

JEFFREY R. LEWIS
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Executive Director and Chief Operating Officer, Heinz Family Philanthropies (1991 to Present)

Direct and administer a multi-million dollar family philanthropy strategically focused on venture philanthropy – using philanthropic dollars to help leverage public and private funds.

Key accomplishments include:

-Author of the Heinz Plan to Overcome Prescription Drug Expenses (HOPE) – a plan to provide prescription drug coverage to all persons 65 and older living in Massachusetts.

-Author of the Aggregate Prescription Drug Purchasing Study: Myth or Reality (study under preparation for release in 2001).

-Creation of the Pennsylvania Public School Health Care Voluntary Trust. (Creating the first statewide public school health care purchasing consortium in the United States.)

-Design of the National Women's Retirement Study – A national public education and polling campaign targeted toward the 90% of working women earning \$40,000 or less per year.

-Creation of the Heinz/Good Housekeeping Magazine women's pension education initiative – includes co-authorship of "What Every Woman Needs to Know About Money and Retirement" – April 1998 magazine supplement (now in four languages).

-Design of the Heinz pension collaboration with the National Newspaper Publishers Association (African-American weekly papers) and the National Association of Hispanic Publications (Hispanic Weekly papers).

-Creation of the Allegheny County Public School Health Insurance Purchasing Consortium and the Allegheny County Public Sector Health Insurance Purchasing Consortium.

-Design of the Women and Environment Initiative – Annual national conference focused on women's health and environment.

-Design and implementation of the Democracy Project – National study to develop solutions to engage 18-24 year olds in the voting process.

-Creation of the Heinz/MassINC Study – Study to develop solutions to the emergence of economic threats to workers and their families in the Commonwealth of Massachusetts, specifically the high cost of living and exodus of skilled workers to other states.

Chief of Staff For Teresa Heinz, Heinz Family Office (1991 to Present)

Act as the Chief of Staff for Teresa Heinz on matters related to political and personal issues. This position involves extensive personal representation of Mrs. Heinz and the Heinz family in Pennsylvania and across the United States.

Associated activities include:

-Co-director, Carnegie Mellon University Regional Economic Revitalization Initiative – Responsible for designing labor and tax strategies.

-Adjunct Professor for Public Policy, H. John Heinz III School of Public Policy and Management, Carnegie Mellon University (1994).

-Developed and implemented a statewide strategy for the role of Teresa Heinz in Senator John Kerry's (her husband) 1996 reelection campaign.

Senior Policy Advisor, United States Senator John Kerry (D-Massachusetts) (1995)

Assist the Senator and his staff in developing strategy for a myriad of domestic policy issues such as minimum wage, pension policy, women's economic issues, etc. This work continues in a non-paying capacity.

Republican Staff Director, United States Senate Special Committee on Aging, Ranking Member Senator John Heinz (R-Pennsylvania) (1989-1991)

Responsible for developing and directing the Senator's public policy initiatives on the Senate Special Committee on Aging and the Senate Finance Committee in the areas of health care and insurance reform, pension and Social Security, unemployment, age discrimination and education matters. These responsibilities also included designing and implementing the Senator's investigative strategies regarding health care, housing, and nursing home fraud and abuse. Additional responsibilities included developing and implementing both short and long-term partisan and bipartisan strategies on public policy and political issues for Senator Heinz and the Members of the Committee, designing and directing investigations for Republican members of the Committee, and assisting the majority staff director with personnel matters. Direct administrative responsibility for a staff of fourteen.

Strategic Planning and Policy Consultant (1986 to present)

Designed specific business, political and communication strategies for private business and individuals, government agencies and non-profit organizations.

Member, Oregon Employment Appeals Board, Appointed by Governor Victor Atiyeh (R-Oregon) (1986-1988)

Appointed by the Governor of Oregon as the business representative on a three-member board. Responsible for adjudicating unemployment compensation appeals and addressing such major public policy issues as unemployment compensation and drug testing in the workplace, and AIDs testing for employees of hospitals and medical facilities.

Assistant to Governor Victor Atiyeh (R-Oregon) (1984-1986)

Served as the Governor's chief staff person responsible for mediating disputes involving state agencies and the general public. Additional responsibilities included developing targeted publications for the Governor on combating child abuse, a handbook for seniors, and a statewide program recognizing the accomplishments of Oregonians who care for foster children.

Consultant on Pension Policy, U.S. Department of Labor, Office of the Assistant Secretary for Legislative Affairs (1983-1984)

Served as special assistant to the Assistant Secretary for Legislative Affairs. Acted as liaison with and strategist for the White House on pension legislation pending before Congress. These responsibilities included developing a bipartisan legislative and political strategy for the Assistant Secretary on women's pension issues.

Senior Legislative Assistant, U.S. Senator Bob Packwood (R-Oregon) (1979-1983)

Senior staff person for all health, welfare and labor issues pending before the Senate Finance Committee. Responsibilities also included drafting legislation, developing legislative and non-legislative strategies for implementing legislative and political objectives, preparation of publications, floor statements and speeches for the Senator. Additional responsibilities included serving as chief liaison with organized labor, seniors' organizations, health care organizations and institutions across the U.S.

Deputy Staff Director, U.S. Senate Special Committee on Aging, Ranking Member Senator Pete Domenici, (R-New Mexico) (1978-1979)

Responsibilities included developing and implementing health care, pension, disability and labor-related strategies for both Committee and non-Committee legislative initiatives. Responsible for a staff of ten professionals.

Legislative Assistant, Urban Elderly Coalition (1977-1978)

Research Assistant, National Council on Aging (1976-1977)

EDUCATION

1989 Juris Doctorate Northwestern School of Law, Lewis and Clark College,
Portland, OR

1983 Master of Science University of Southern California, Leonard Davis School of
Gerontology, Los Angeles, CA

1975 Bachelor of General Studies University of Michigan, Ann Arbor, MI
(with distinction)

LEGAL PUBLICATIONS

"Drug Testing in the Workplace: Legal and Policy Implications for Employers and Employees," *Detroit College of Law Review*, 3 DET. C.L. REV. 699 (1987). (Winner of the 1987 Detroit College of Law Fifth Annual Labor Law Writing Competition, Law Student Division)

"Redesigning Medicare: Moving Forward," *Public Law Forum*, Saint Louis University School of Law, Vol. 4, No. 1, 1984

"Social Security: Public and Private Sector Policy Options for the Future," *Notre Dame Journal of Legislation*, Vol. 10, No. 1, January 1983

OTHER PUBLICATIONS

"The Private Sector: Merger of insurers would give consumers the blues," *Pittsburgh Post-Gazette*, August 7, 2001

"Sen. Heinz Knew a Decade Ago What Surgery Medicare Needed" (by Jeffrey Lewis, Cliff Shannon and Richard Bryers), *Allentown Morning Call*, April 13, 2001

"Ten Years Later, Sen. Heinz Is Remembered," *Erie Times*, April 4, 2001

"Feminized Poverty National Disgrace," *The Tribune* (Scranton, PA), April 4, 2001

"Women: Uniquely at Risk in Retirement" (by Cindy Hounsell and Jeffrey Lewis), *The Business & Aging Networker*, Vol. 8, No. 4, Spring 2000

"State Pensions Have Deficiencies for Women" (by Jeffrey R. Lewis and Ellen A. Bruce), *Everett Herald* (WA), April 15, 2000

"Heinz Plan to Overcome Prescription Drug Expenses," A project of the Heinz Family Philanthropies prepared by Jeffrey R. Lewis, April 5, 2000

"Women in Government Jobs Increasingly Endangered" (by Jeffrey R. Lewis and Ellen Bruce), *PSEA The Voice*, March 2000.

"State Pension Law Inadequate to Protect Women" (by Jeffrey R. Lewis and Ellen A. Bruce), *Springfield Sunday Republican* (MA), December 26, 1999

"Off-The-Wall Gift: Some Security for the Future" (by Jeffrey R. Lewis and Teresa Heinz), *Philadelphia Daily News*, December 23, 1999

"U.S. Needs Policy to Encourage Women Workers to Save More" (by Teresa Heinz and Jeffrey R. Lewis), *PSEA The Voice for Education* (PA), October 1999

"U.S. Needs Policy to Encourage Women Workers to Save More" (by Teresa Heinz and Jeffrey R. Lewis), *Buck's County* (PA) *Courier*, September 13, 1999

“U.S. Needs Policy to Encourage Women workers to Save More” (by Teresa Heinz and Jeffrey R. Lewis), *Allentown (PA) Morning Call*, September 6, 1999

“Planning for Retirement” (by Jeffrey R. Lewis and Cindy Hounsell), *PT Magazine*, June 1999

“Social Security Reform: What Else Is In Pandora’s Box?” (By Dorothy Leavell and Jeffrey R. Lewis), *The Chicago Crusader*, February 20, 1999

“Social Security Reform: What Else Is In Pandora’s Box?” (By Dorothy Leavell and Jeffrey R. Lewis), *The Gary Crusader*, February 20, 1999

“Perfect Gift for Employees” (by Teresa Heinz and Jeffrey Lewis), *Sacramento Bee*, December 24, 1998

“This Year, Give Employees a Holiday Gift They’ll Save” (by Teresa Heinz and Jeffrey Lewis), *Atlanta Constitution*, December 18, 1998

“We Wish You a Merry Retirement” (by Teresa Heinz and Jeffrey Lewis) *Detroit Free Press*, December 16, 1998

“Is the ‘Feminine Face’ of Poverty Frightening Enough to Prompt Retirement Planning?” (By Jeffrey Lewis and Cindy Hounsell), *RDH*, The National Magazine for Dental Hygiene Professionals, September 1998

“A Fair Share: What Women Need to Know when Divorce Looms” (by Jeffrey Lewis and Cindy Hounsell), *Richmond Times-Dispatch*, July 13, 1998

“Get a Financial Life: Women Uniquely at Risk for Late-life Poverty” (by Jeffrey Lewis and Cindy Hounsell), *Richmond Times-Dispatch*, July 6, 1998

“Social Security, Divorce and Poverty” (by Jeffrey Lewis and Cindy Hounsell), *The Washington Afro-American*, June 6-12, 1998

“Rebuild Democracy’s Foundation” (by Jeffrey Lewis and Sanford D. Horwitt), Worcester, Massachusetts *Telegram & Gazette*, June 6, 1997

“Women and Retirement Security,” *Women in Action*, Vol. 9 No.1 (1997) (by Teresa Heinz, Cindy Hounsell and Jeffrey R. Lewis) (A Colorado Women’s Agenda newsletter)

“The Quiet Crisis: Retirement Issues Await Today’s Working Women,” Vol. 19, *Women & Philanthropy News*, Fall/Winter 1996

"Children, Middle Aged and Elderly Populations: Balancing Perceived Needs Against Changing Societal Pressures, Priorities and Budget Constraints", 139 Congressional Record 4442 (April 2, 1993)

Understanding 1991 Medicare: A Guide for Children of Aging Parents, Senate Report 101-131 (January 1991)

"Older Americans Month: A Time for Concern or Celebration?" *Aging Network News*, Vol. VII, April 1990

"Abdicating Legislative Responsibility: The Great Political Escape," *Oregon Health Law Newsletter*, Vol. 1, May 1989

"Public Policy and AIDS: A Need for Action, A Need for Change," *Oregon Journal on Aging*, Vol. II, No. 3, Fall 1988

"Understanding the Impact of AIDS," *Oregon Journal on Aging*, Vol. II, No. 3, Fall 1988

"Advice to Administrators: CNAs, Abuse Investigations and Unemployment," *Oregon Journal on Aging*, Vol. I, No. 2, Summer 1987

"Helping Rural Hospitals Expand Their Marketplace," (prepared for private consulting firm) May 1985

The Parents Handbook: Understanding Child Sexual Abuse, State of Oregon, May 1985

Seniors Handbook, State of Oregon, December 1984

"The Future of Long-Term Care," *OAHA Action*, Winter 1984

"Senior Power Grows as a Political Force," *Senior Tribune*, Vol. 2, No. 10, October 1984

"A 1984 Force That Can't Be Ignored: The Political Power of the Elderly,"
Senior Challenge, Vol. 3, No. 5, July 1984
OSTA Review, Vol. 7, No. 62, Summer 1984
Sandy Senior Scene, Vol. 11, No. 6, September 1984
Northwest Advocate, Vol. 12, No. 6, September 1984

"Pay TV Would Hurt the Elderly," *The Blue Mountain Eagle*, May 19, 1983

"Beyond Prospective Reimbursement for Hospitals," *HMO*, December 1982

"Payment Supplementation: Can and How It Should Be Done," *Contemporary Administrator*, March 1982

"Supplementation: A Way to Reduce Medicaid Spending," *Hospital Progress*, March 1982

"Social Security: Public and Private Sector Policy Options for the Future," *Digest*, December 1981

ARTICLES PREPARED FOR TERESA HEINZ

"Helping Seniors With Out-of-Reach Drug Costs" (by Teresa Heinz, Thomas Finneran and Thomas Birmingham), *Boston Globe*, April 27, 2000

“Closing the Money Gap for Women in Retirement” (authored by Teresa Heinz), *Boston Globe*, October 1, 1999

“The Gift of Security” (authored by Teresa Heinz), *Boston Globe*, December 15, 1998

“Pension Reform Is A Priority For Most Working Women,” October 8, 1996, *Worcester Telegram & Gazette* (authored by Teresa Heinz and Massachusetts State Representative Harriette Chandler)

"The American Parent: Challenge, Communication and Change," *13 Tele. & Families*, 5, (1991)

ARTICLES PREPARED FOR SENATOR HEINZ

"Overhauling Medicare," *HMO*, Second Quarter 1990

"Health Care for Children: Our Future -- Our Destiny," *Federation for American Health Systems Review*, November/December 1990

ARTICLES PREPARED FOR SENATOR JOHN KERRY

“Working Mothers Deserve A Raise,” *The Boston Globe*, September 4, 1995

ARTICLES PREPARED FOR SENATOR PACKWOOD

"Arms to Jordan - A Threat to Israel," *Jewish Monthly*, May 1982

"Long-Term Care: Public and Private Sector Policy Options," *The Journal of the Institute for Socioeconomic Studies*, Autumn 1981

"A Need to Move Progressively Ahead," *Journal of American Health Care*, November 1980

"Issue Paper: Long-Term Care for the Elderly and Disabled," *Home Health Review*, September 1980