



*The Commonwealth of Massachusetts*  
*Commonwealth Health Insurance Connector Authority*  
*100 City Hall Plaza*  
*Boston, MA 02108*

RECEIVED  
STATE ETHICS COMMISSION  
MAR 20 AM 10:09

MAURA HEALY  
Governor

KATE WALSH  
Board Chair

KIM DRISCOLL  
Lieutenant Governor

AUDREY GASTEIER  
Executive Director

March 16, 2023

State Ethics Commission  
One Ashburton Place  
Room 619  
Boston, MA 02108

Re: Disclosure of Travel Expenses Serving a Legitimate Public Purpose and Determination by State  
Appointing Authority

To Whom It May Concern:

Enclosed for filing please find copies of the following documents:

- 1.) Disclosure of Travel Expenses Serving a Legitimate Public Purpose (Marissa Woltmann); and
- 2.) Determination by a State Appointing Authority;


If you have any questions about this matter, please call me at 617-936-1034. Thank you for your attention to this matter.

Very truly yours,

Andrew R. Egan  
General Counsel

**DISCLOSURE BY NON-ELECTED PUBLIC EMPLOYEE  
OF TRAVEL EXPENSES SERVING A LEGITIMATE PUBLIC PURPOSE  
AS REQUIRED BY 930 CMR 5.08(2)(d)1.**

|   |   |
|---|---|
|   | <b>NON-ELECTED PUBLIC EMPLOYEE INFORMATION</b>  |
| Name of non-elected public employee:  | Marissa Woltmann  |
| Title/ Position   | Senior Director of Policy and Applied Research  |
| Agency/ Department  | Commonwealth Health Insurance Connector Authority   |
| Agency address:   | 100 City Hall Plaza, 6 <sup>th</sup> Fl<br>Boston, MA 02108   |
| Office phone:   | 617-933-3151  |
| Office e-mail:  | Marissa.woltmann@mass.gov   |
| Write an X to confirm each statement.   | <p>I am filing this disclosure because:</p> <p><input checked="" type="checkbox"/> I am going to engage in an activity that serves a legitimate public purpose, i.e., it is intended to promote the interests of the Commonwealth, a county or a municipality; and</p> <p><input checked="" type="checkbox"/> A non-public entity (but not a lobbyist) has offered to reimburse, waive or pay travel expenses and costs worth more than \$50.</p> |
|   | <b>ACTIVITY THAT SERVES A LEGITIMATE PUBLIC PURPOSE</b>   |
| Describe the activity which is the reason for traveling.  | I will attend the State Health and Value Strategies in-person Small Group Convening for State-Based Marketplace and Insurance Department leadership focused on innovations in state Marketplace and commercial insurance.   |
| Describe your participation in the activity.  | I will learn about states' preparations for the end of Medicaid coverage protections as well as innovations in Marketplace and commercial coverage, including advancing health equity in the commercial market, opportunities to improve member experiences through networks and benefits, cost issues, and how states are supporting facilitated/automatic enrollment and leveraging state-based subsidies.                                      |
| Date, time and location of activity.  | The Convening is on March 13 and 14, 2023, and will be held in Philadelphia, Pennsylvania at the Study Hotel.   |
| Please explain how the activity will promote the interests of the Commonwealth, a county or a municipality. | My attendance of the Convening will promote the interests of the Commonwealth by ensuring that I am informed about the best strategies available to the Health Connector and to the Division of Insurance to support members in using their health insurance coverage, as well as to share best practices from Massachusetts in a national context.   |

|   |  |
|---|--|
|   | <b>TRAVEL EXPENSES</b>   |
| Identify the person or organization that offered to reimburse, waive or pay your travel expenses. | State Health and Value Strategies, a program of the Robert Wood Johnson Foundation   |
| Address of person or organization.  | 50 College Road East<br>Princeton, NJ 08540-6614   |
| Provide information in as much detail as possible:  | <i>Itemization and explanation of amounts offered:</i>   |
| Transportation:   | <i>Air, train, bus, and taxi fare and rental car hire, etc.</i><br>Roundtrip airfare between Boston and Philadelphia \$248<br>Taxi/rideshare to and from the airport in both cities est. \$200   |
| Lodging:  | <i>Overnight accommodations.</i><br>One night's stay at The Study Hotel for \$266  |
| Meals:  | <i>Breakfast, lunch, dinner, special events.</i><br>State Health and Value Strategies will be providing lunch, and a networking reception on Monday March 13. On Tuesday, it will provide breakfast and a boxed lunch. The cost of these meals is estimated at \$120 in total. |
| Admission:  | <i>Registration, admission, tickets, etc.</i>  |
| Other (please list):  | <i>Refreshment, instruction, materials, entertainment, etc.</i>  |
| Total:  | Est. \$834   |
| Write an X beside any statement that applies.   | <input checked="" type="checkbox"/> I have attached the relevant itinerary.<br><input checked="" type="checkbox"/> I have attached the relevant agenda.  |
| Employee signature:   |   |
| Date:   | 3/6/23   |

Attach additional pages if necessary.

Complete the disclosure and submit it to your appointing authority.

## DETERMINATION BY APPOINTING AUTHORITY

|   |   |
|---|---|
|   | <b>APPOINTING AUTHORITY INFORMATION</b>   |
| Name of Appointing Authority:   | Audrey Gasteier   |
| Agency and Title/Position:  | Commonwealth Health Insurance Connector Authority<br>Executive Director   |
| Agency address:   | 100 City Hall Plaza, Fl. 6<br>Boston, MA 02108  |
| Office phone:   | 617-933-3030  |
| Employee who filed the disclosure:  | Marissa Woltmann  |
|   | <b>DETERMINATION</b>  |
| <b>To give approval, check <u>both</u> statements.</b>                                  | <p>Upon consideration of the facts disclosed by the employee above, I find that:</p> <p><input checked="" type="checkbox"/> Acceptance of the reimbursement, waiver or payment of travel expenses will serve a legitimate public purpose, i.e., it will promote the interests of the Commonwealth, a county or a municipality; AND</p> <p><input checked="" type="checkbox"/> Such public purpose outweighs any special non-work related benefit to the employee or the person providing the reimbursement, waiver or payment.</p>  |
| Reason that the employee's travel or attendance will serve a legitimate public purpose: | Marissa's attendance of the Convening will promote the interests of the Commonwealth by ensuring that she and the Health Connector are informed about the best strategies available to the Health Connector and to MassHealth to manage the unwinding of the Medicaid Continuous Coverage requirement. This will allow her to give informed and actionable advice to ensure that the unwinding occurs in a manner that is best-suited to the residents of Massachusetts. The Convening will also educate Marissa about other policy matters including reducing uninsurance and ways to improve health insurance network standards, knowledge she can apply to her work in Massachusetts to benefit Massachusetts residents. |
| Appointing Authority signature:   | <i>Audrey Gasteier</i>  |
| Date:   | 3/9/2023  |

Attach additional pages if necessary.

The appointing authority should maintain the disclosure as a public record and give a copy of any signed determination to the employee.

## Woltmann, Marissa (CCA)

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**From:** Marissa Woltmann <woltmannm@gmail.com>  
**Sent:** Monday, March 6, 2023 12:08 PM  
**To:** Woltmann, Marissa (CCA)  
**Subject:** Fwd: Your trip confirmation (BOS - PHL)

CAUTION: This email originated from a sender outside of the Commonwealth of Massachusetts mail system. Do not click on links or open attachments unless you recognize the sender and know the content is safe.

----- Forwarded message -----

**From:** American Airlines <[no-reply@info.email.aa.com](mailto:no-reply@info.email.aa.com)>  
**Date:** Sun, Feb 19, 2023 at 9:43 PM  
**Subject:** Your trip confirmation (BOS - PHL)  
**To:** <[WOLTMANNM@gmail.com](mailto:WOLTMANNM@gmail.com)>

American Airlines 


Issued: February 20, 2023

## Your trip confirmation and receipt


You can check in via the American app 24 hours before your flight and get your mobile boarding pass.

**Record Locator: XAOVEH**

**Monday, March 13, 2023**


 **BOS**  
Boston  
**8:00 AM**

**AA 1185** 

 **PHL**  
Philadelphia  
**9:35 AM**

**Seat:**  
**Class: Economy (B)**  
**Meals:**

**Tuesday, March 14, 2023**

 **PHL**  
Philadelphia  
**2:21 PM**

**AA 2550** 

**BOS**  
Boston  
 **3:38 PM**

Seat:  
Class: **Economy (B)**  
Meals:

[Manage your trip](#)

Earn 10,000 bonus miles  
Plus \$50 back and no annual fee. Terms Apply.  
[Learn more](#)



## Your purchase

**Marissa Woltmann**  
Join the AAdvantage® Program

New ticket (0012372789749) \$247.80  
[\$202.79 + Taxes & carrier-imposed fees \$45.01]

**Total cost** **\$247.80**

## Your payment

Trip Credit (ending 3488) \$59.99  
AmericanExpress (ending 1013) \$187.81

**Total paid** **\$247.80**

## Bag information

### Checked Bag (Airport)

1<sup>st</sup> bag     \$30.00  
2<sup>nd</sup> bag     \$40.00

### Checked Bag (Online\*)

|                     |         |
|---------------------|---------|
| 1 <sup>st</sup> bag | \$30.00 |
| 2 <sup>nd</sup> bag | \$40.00 |

Maximum dimensions: 62 inches or 158 centimeters calculated as (length + width + height)

Maximum weight: 50 pounds or 23 kilograms

Bag fees apply at each Check-in location. Additional allowances and/or discounts may apply. Bag and optional fees

If your flight is operated by a partner airline, see the other airline's website for carry-on and checked bag policies.

\*Online payment available beginning 24 hours (and up to 4 hours) before departure.

### Carry-on bags

**1<sup>st</sup> carry-on** Includes purse, briefcase, laptop bag, or similar item that must fit under the seat in front of you.

**2<sup>nd</sup> carry-on** Maximum dimensions not to exceed: 22" long x 14" wide x 9" tall (56 x 35 x 23 cm).



[Book a hotel »](#)



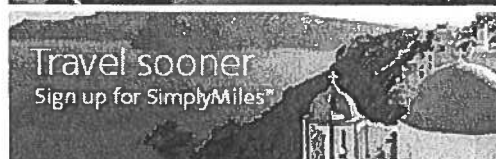
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Additional Services are subject to credit card approval at time of ticketing. Additional Services may appear on multiple accompanied documents as a matter of reference.

If you have purchased a NON-REFUNDABLE fare, the itinerary must be canceled before the ticketed departure time of the first unused coupon or the ticket has NO VALUE. If the fare allows changes, a fee may be assessed for changes and restrictions may apply.

You have up to 24 hours from the time of ticket purchase to receive a full refund if you booked at least 2 days before departure. You must log in on [aa.com](http://aa.com) or



## State Health and Value Strategies Small Group Convening The Individual Market in 2023

March 13-14, 2023 – University of Pennsylvania Carey Law School – Philadelphia, PA

| Time                    | Topic  |
|-------------------------|--|
| 11:30 a.m. – 12:30 p.m. | Lunch  |
| 12:30 - 1:00 p.m.       | <b>Welcome &amp; Introductions</b>   |
| 1:00 - 2:30 p.m.        | <b>Unwinding – What We Know and What We Are Planning for</b><br>Unwinding Medicaid coverage will be an all-encompassing project over the next year. This session will review current guidance and suggested actions steps for states as they prepare for the impact of unwinding on the individual market.   |
| 2:30 - 2:45 p.m.        | Break  |
| 2:45 - 3:30 p.m.        | <b>Quick Strike Session 1 – Easy Enrollment Implementation Updates</b><br>Maryland led the way implementing a facilitated enrollment process based on tax filing, and more states are adding similar programs and new innovations each year. This session will offer an opportunity to discuss recent developments and next steps for these programs.  |
| 3:30 - 4:15 p.m.        | <b>Quick Strike Session 2 – State Subsidy Options and Design</b><br>Despite the success of the ACA and the enhanced subsidies extended by the Inflation Reduction Act, some consumers still find healthcare difficult to access due to cost—especially out-of-pocket cost sharing. This session will drop into the weeds of state subsidies and how states can apply them in a flexible, supportive policy design.   |
| 4:15 - 5:00 p.m.        | <b>Quick Strike Session 3 – Implementing an Enrollee Advisory Group</b><br>A core principle of health equity is that when policies are discussed that affect a group of people, those people should be part of the conversation. This session will identify opportunities to build and enhance connections to enrollees through enrollee advisory groups.  |
| 5:00 p.m.               | <b>Networking Reception</b>  |
| 8:30 a.m.               | <b>Breakfast Available</b>   |
| 9:00 - 10:15 a.m.       | <b>The Future of Network Regulation</b><br>CMS has made clear its intention to enhance standards for and oversight of network adequacy across all programs, with updated time and distance and new office wait time standards in place for the FFM. Federal law has also imposed new requirements for provider directories. This session will explore ways for states to assess plan networks, options for oversight, and policies to address disparities in access. |
| 10:15 - 10:30 a.m.      | Break  |
| 10:30 - 11:45 a.m.      | <b>Reaching the Remaining Uninsured</b><br>The goal of maximizing enrollment in the marketplace has been a challenge since the beginning. However, changes to federal surveys like the ACS will make identifying communities for enrollment assistance more difficult. This session will dig into strategies to boost enrollment while also managing the unwinding.  |
| 11:45 a.m. – 12:00 p.m. | Wrap Up & Next Steps (Lunch available)   |

**The Ninth Annual Health Insurance Exchange Conference:  
Changing Market Conditions and Marketplaces During a Time of (Relative) Political Stability**

University of Pennsylvania Carey Law School

Co-Sponsored by the Princeton University Center for Health & Wellbeing and

the Penn Leonard Davis Institute for Health Economics

Supported by the Robert Wood Johnson Foundation

**March 14-15, 2023**

**Tuesday afternoon**

- 11:15-1:15 – Lunch available
- 1:15-2:15 Opening Keynote: TBD – Discussion of macro trends (provider consolidation, private equity, inflation) on health insurance sector
  - Moderator/commentator: Allison Hoffman (Penn Law)
- 2:15-2:30 Break
- 2:30-3:30 Reevaluating Networks, Adequacy, and Value
  - **Moderator/commentator: Joel Ario**
- 3:30-3:45 Break
- 3:45-5:00 Enhancing the Consumer Experience

Core to the success of Marketplaces is attracting and retaining customers. States are taking the lead to create new programs, review existing processes, and working with the newly eligible populations coming out of the Medicaid continuous coverage requirement.

  - **Moderator/commentator: Heather Howard (Princeton)**
- 5:00 First day wrap up
- 6:00 Cocktails/dinner for speakers, state officials & invited guests

**Wednesday morning**

- 8:30-9:00 Breakfast available
- 9:00-10:30 Research Panel
  - **Moderator/commentator: Tom Baker (Penn Law)**
- 10:30-10:45 Break
- 10:45-12:15 The New 1332 Waiver Paradigm

States have been applying for and receiving Section 1332 waivers for a wide variety of new innovations. This panel will hear from the states that have or are seeking

  - **Moderator/commentator: Dan Meuse (Princeton)**
- 12:15 Wrap up
- 12:30 Boxed Lunches Available

## Egan, Andrew (CCA)

---

**From:** Stephanie Benjamin <stephanie.benjamin@princeton.edu>  
**Sent:** Monday, March 6, 2023 12:03 PM  
**To:** Woltmann, Marissa (CCA)  
**Subject:** RE: Hotel Information: Convening in Philadelphia

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Yes, of course.

The hotel is \$229.00 per night with total tax \$37.48, so \$266.48 total.

Meal estimates:

Lunch, 3/13: \$30

Reception, 3/13: \$40

Breakfast, 3/14: \$20

Do you need the meals for the HIX conference too? You can either base it off of these (I think they are using similar caterers) or, if you prefer, I can check with Carlyn Miller at Penn.

Best,

Stephanie

---

**From:** Woltmann, Marissa (CCA) <marissa.woltmann@state.ma.us>  
**Sent:** Friday, March 3, 2023 3:37 PM  
**To:** Stephanie Benjamin <stephanie.benjamin@princeton.edu>  
**Subject:** RE: Hotel Information: Convening in Philadelphia

Hi Stephanie,

Thank you for all this information. Do you happen to have cost estimates for the hotel and meals SHVS will be covering? I need to fill out a disclosure form that includes them. It doesn't need to be exact or especially detailed, but breaking out estimates for food vs. lodging would be perfect.

Thanks,  
Marissa

Marissa Woltmann (she/her)  
Senior Director of Policy and Applied Research

**Massachusetts Health Connector**  
100 City Hall Plaza, Boston, MA 02108  
**C:** 617-388-3736  
**O:** 617-933-3151  
**F:** 617-933-3070  
**MAhealthconnector.org**

**From:** Stephanie Benjamin <[stephanie.benjamin@princeton.edu](mailto:stephanie.benjamin@princeton.edu)>  
**Sent:** Tuesday, February 21, 2023 1:28 PM  
**To:** Woltmann, Marissa (CCA) <[marissa.woltmann@mass.gov](mailto:marissa.woltmann@mass.gov)>  
**Subject:** Hotel Information: Convening in Philadelphia

CAUTION: This email originated from a sender outside of the Commonwealth of Massachusetts mail system. Do not click on links or open attachments unless you recognize the sender and know the content is safe.

Dear Marissa,

We are looking forward to seeing you at our convening on *The Individual Market in 2023* on March 13-14 in Philadelphia, PA. We have a room reserved for you at The Study at University City:

***Address:***

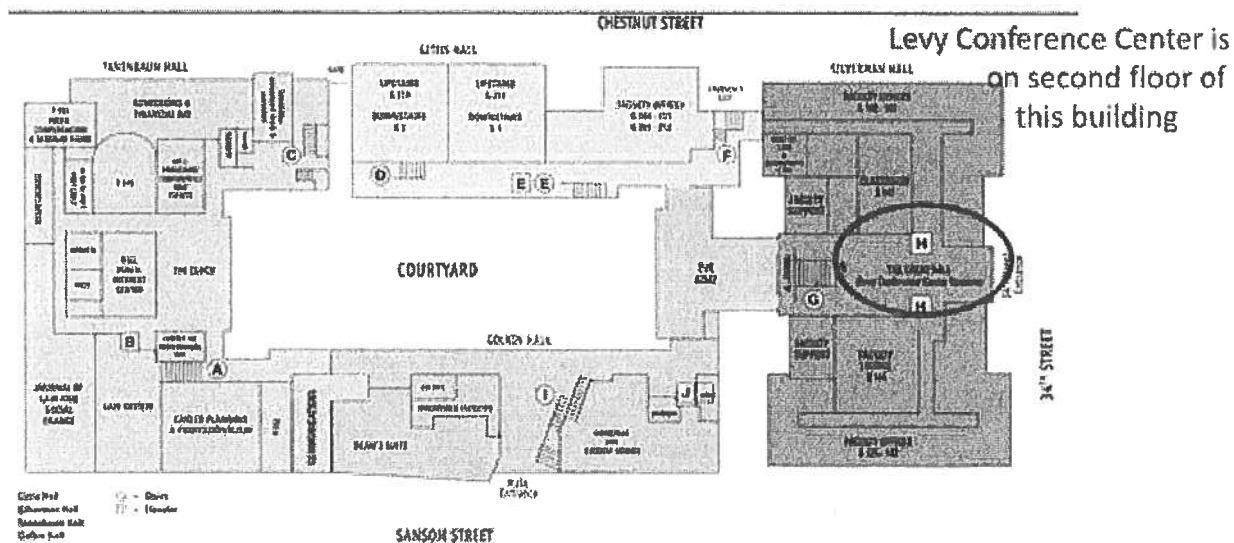
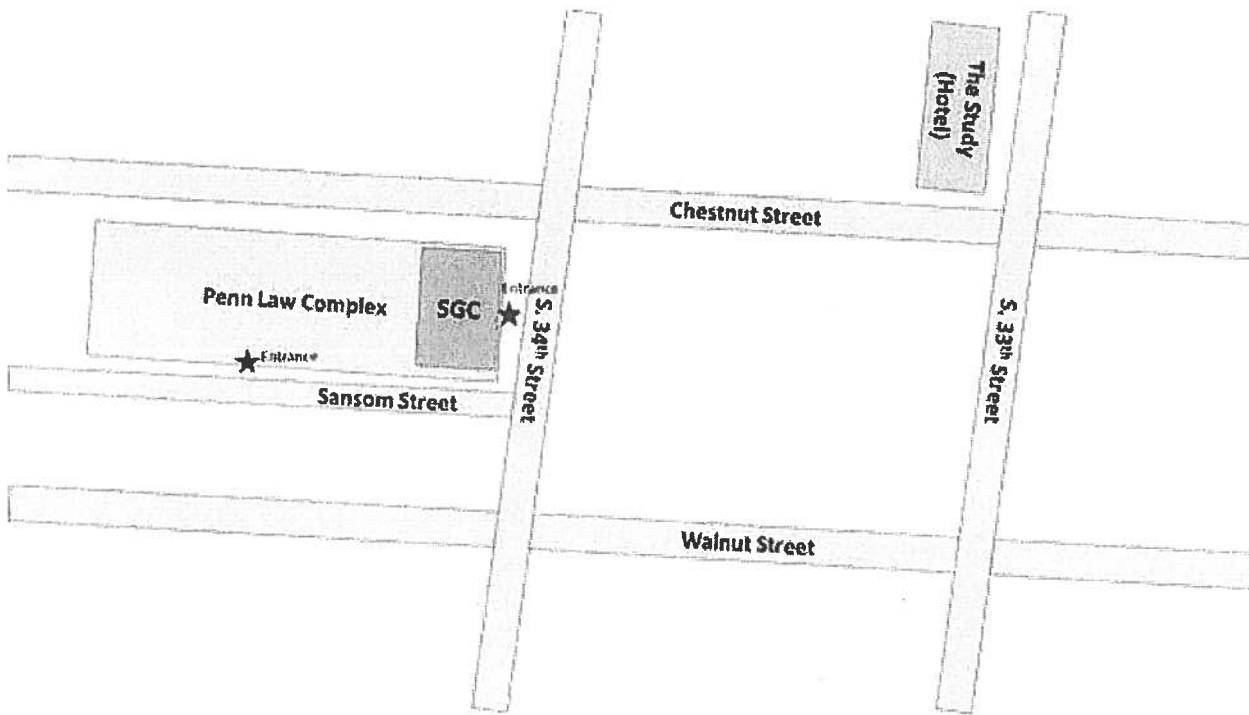
The Study at University City  
20 S. 33<sup>rd</sup> Street  
Philadelphia, PA 19104  
(215) 398-1868  
[Website](#)

***Reservation Details (you may have already received a confirmation directly from the hotel):***

Guest Name: **Marissa Woltmann**  
Check-in: **3/13/2023**  
Check-out: **3/14/2023**  
Number of Nights: **1**  
Hotel Confirmation Number: **66673449-1**

Please let me know as soon as possible if your reservation details are in error or if your plans change.

Guest room internet access is included. Check-in time is 3:00 p.m. and check-out time is 12:00 noon. Since many guests are arriving on Monday and our meeting starts at 11:30 a.m., prior to check-in, you are welcome to bring your suitcase to our meeting or check it with reception at the hotel before heading over. Our convening is being held on Penn's campus at the **Levy Conference Center**, which is on the second floor of **Silverman Hall in the Penn Law School complex**. There are two entrances to the Law School, one on 34<sup>th</sup> Street and one at 3501 Sansom Street. The 34<sup>th</sup> Street entrance has more limited hours, so if it is locked, just proceed around the corner to the 3501 Sansom Street entrance.



For participants attending the HIX Conference on March 14 - 15, that conference is being held on the ground floor of Golkin Hall, which is adjacent to Silverman Hall.

The hotel is located at the corner of 33<sup>rd</sup> and Chestnut Streets in West Philadelphia. It is in walking distance of the Drexel and University of Pennsylvania campuses and is about 8 miles from the Philadelphia International Airport. You can take a taxi from the airport or the Airport Line train from the airport towards Center City to the second stop. The **Penn Medicine** Station is on the University campus and the hotel is an 11-minute walk from there, or a short taxi ride. If you are arriving by Amtrak train, the hotel is a short taxi ride from 30<sup>th</sup> Street Station, Philadelphia. **Onsite valet parking** is available - please reach out to me if you would like me to arrange parking at the hotel.

The Networking Reception will be held at 5:00 p.m. on Monday, March 13 immediately following the meeting, in the Great Hall in Silverman Hall, in the same building where the meeting is held.

Attire for the event is business casual.

Please do not hesitate to reach out if you have any questions or concerns.

Kind regards,  
Stephanie Benjamin  
Program Administrator  
State Health and Value Strategies  
Princeton University  
609-258-2395  
[stephanie.benjamin@princeton.edu](mailto:stephanie.benjamin@princeton.edu)