

Tiber Creek Group

POLITICAL AND POLICY OUTLOOK 2024-2025



TIBER CREEK GROUP

OUR FIRM

Tiber Creek Group (TCG), originally founded in 1987, is an independently-owned firm that crafts custom solutions and strategies for the world's industry leaders to accomplish their policy and political goals. We have offices in Washington, D.C. and New York.

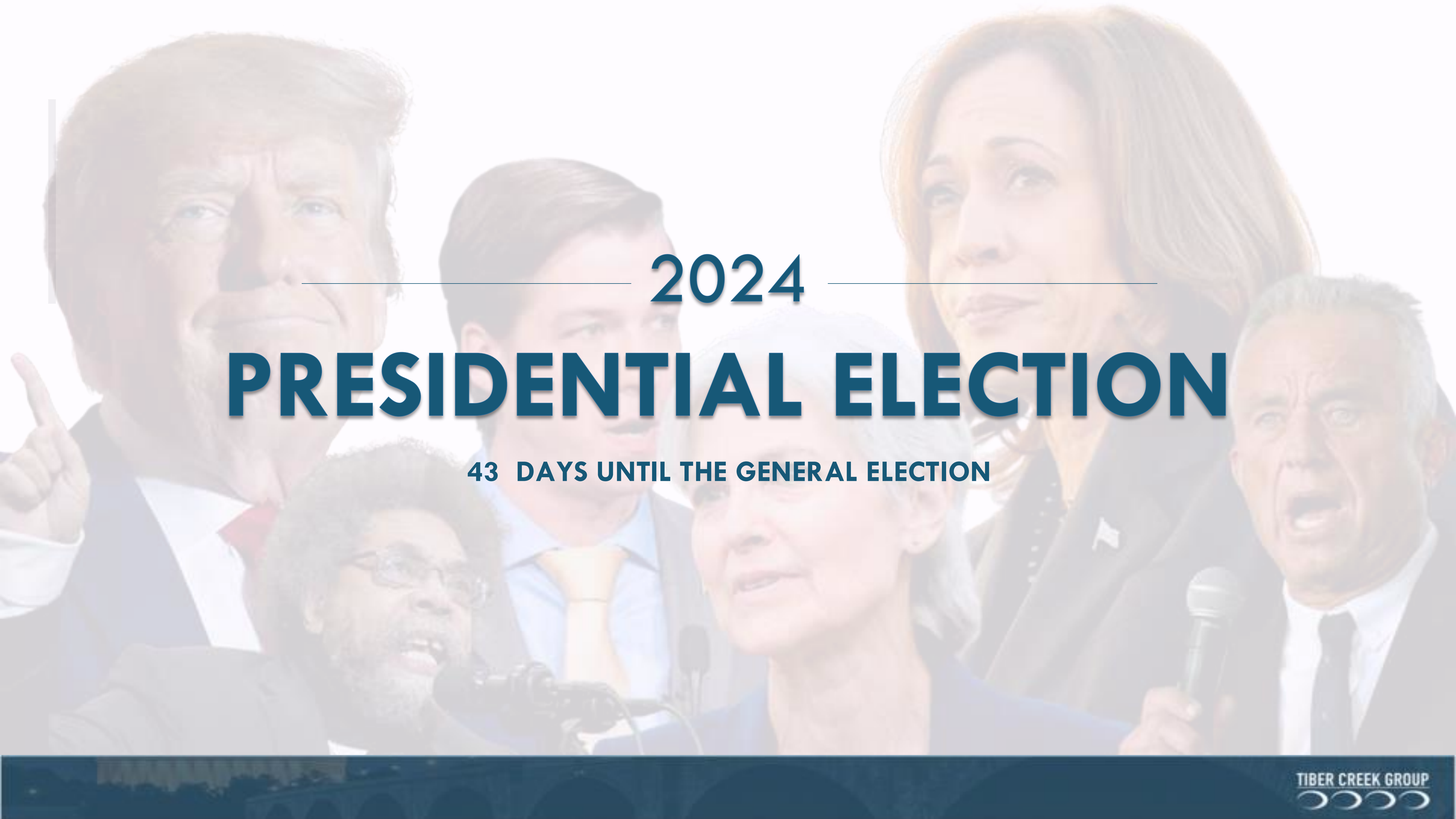
Our 21 lobbyists – 13 Democrats and 8 Republicans – are senior professionals with extensive experience in all parts of the government and with political campaigns at the presidential, federal, state, and local levels. We deploy bipartisan engagement teams that deliver measurable results for clients whether Democrats or Republicans control Congress and the White House.

The combination of policy expertise and deep bipartisan relationships with the Leadership of both Chambers of Congress, all key committee chairs and ranking members, moderate Senate and House Democrats, rank-and-file members of both parties, and the Administration uniquely positions us as a one-stop shop for advocacy needs in the 118th Congress and beyond.

Our TEAM



ANDREW MCKECHNIE served as policy advisor to Senator Chuck Grassley (R-IA) when he was Ranking Member of the Senate Finance Committee. In that role with Sen. Grassley and the Finance Committee, Andrew worked extensively on multiple issues related to the Affordable Care Act (ACA), Medicare reforms, and general health policy. Prior to his time at the Senate Finance Committee, Andrew worked for former Sen. Norm Coleman (R-MN) and former Rep. Jim Ramstad (R-MN), a senior member of the Ways and Means Committee. With a Masters in Health Policy from George Washington University, Andrew works extensively with clients seeking to navigate and respond to the highly-regulated health care industry.



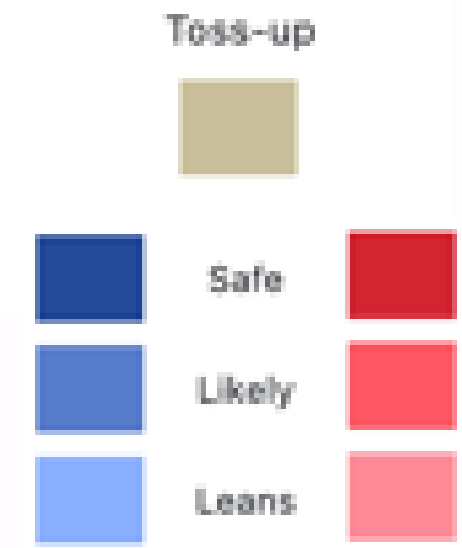
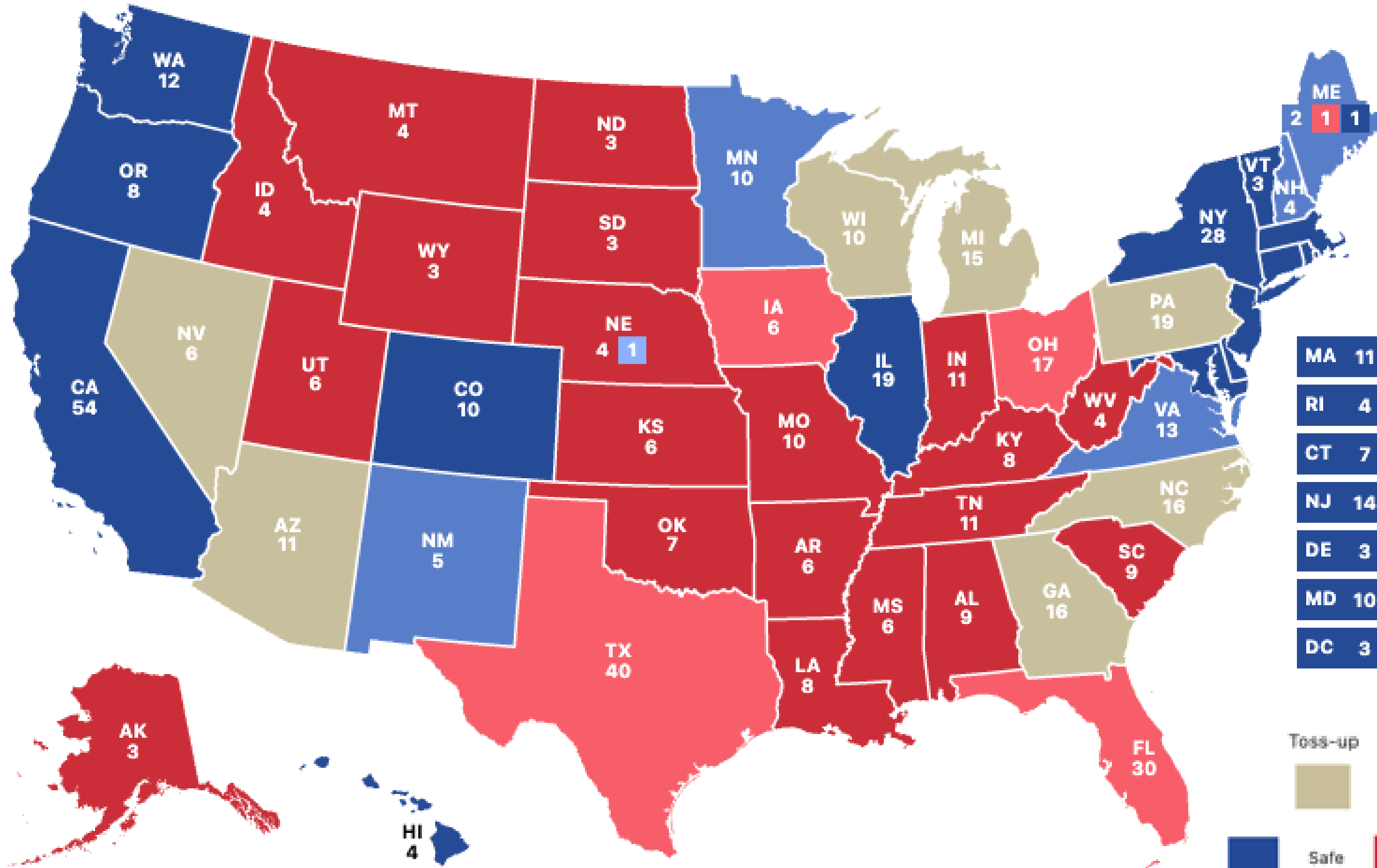
2024

PRESIDENTIAL ELECTION

43 DAYS UNTIL THE GENERAL ELECTION

Democrats ▾ 226

219 Republicans ▾



Republican



Trump

Democrat

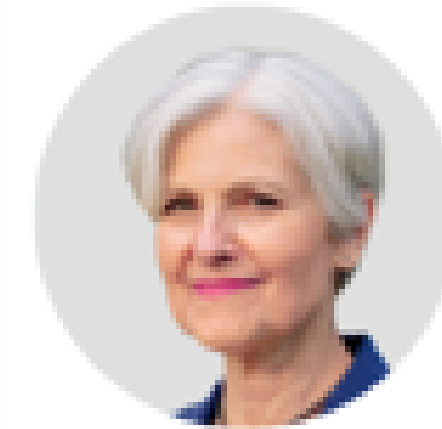


Harris

Independent and Third Party



West



Stein



Oliver

STATE OF THE RACE: NATIONAL POLLING

New York Times/Siena College

**Likely voters between Sept. 11-16*



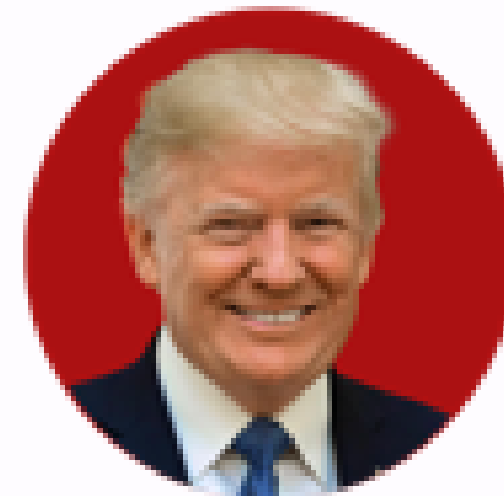
47%



47%

Emerson College

**Likely voters between Sept. 3-4*



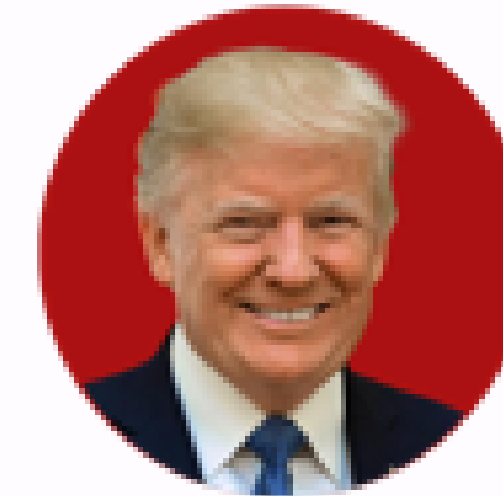
47%



49%

ABC News/Ipsos

**Likely voters, Sept. 13*



46%



52%

STATE OF THE RACE: POLLING AS OF SEPTEMBER 20TH

| STATE | HARRIS | TRUMP |
|----------------|------------|------------|
| National | 49% | 47% |
| Pennsylvania | 49% | 48% |
| Michigan | 50% | 47% |
| Wisconsin | 49% | 48% |
| Nevada | 48% | 48% |
| Arizona | 48% | 48% |
| Georgia | 49% | 47% |
| North Carolina | 48% | 48% |

State of the Race: Demographic Deep Dive

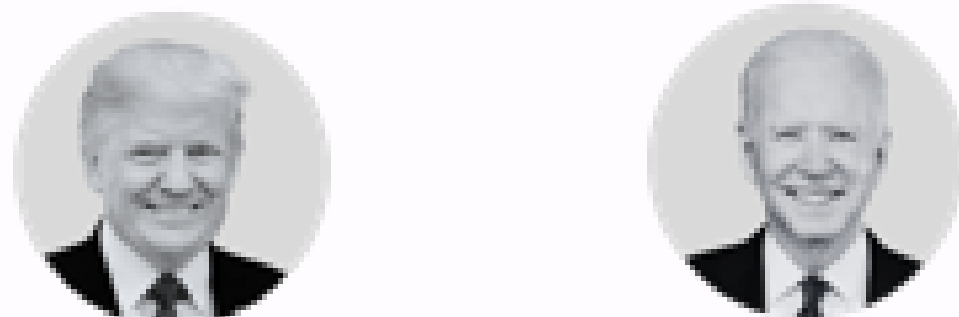
Gender

September 2024



Men – **54%** Men – **40%**
 Women – **42%** Women – **54%**

July 2024



Men – **57%** Men – **34%**
 Women – **43%** Women – **51%**

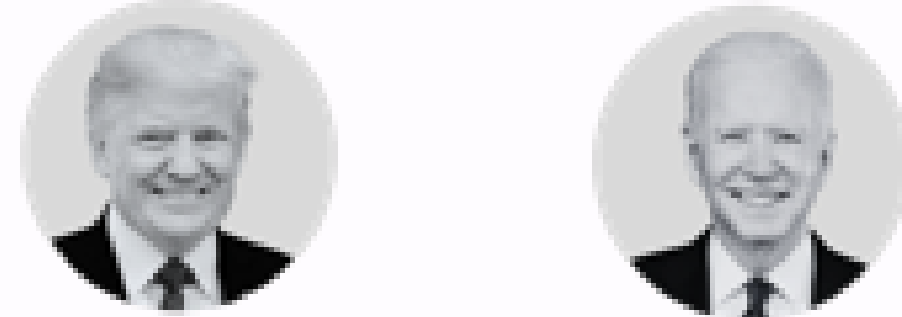
Age

September 2024



18-29 – **37%** 18-29 – **58%**
 30-44 – **45%** 30-44 – **49%**
 45-64 – **49%** 45-64 – **47%**
 65+ – **51%** 65+ – **44%**

July 2024



18-29 – **45%** 18-29 – **48%**
 30-44 – **49%** 30-44 – **43%**
 45-64 – **55%** 45-64 – **37%**
 65+ – **45%** 65+ – **48%**

Race/Ethnicity

September 2024



White – **54%** White – **43%**
 Black – **15%** Black – **79%**
 Hispanic – **39%** Hispanic – **51%**
 Other – **43%** Other – **46%**

July 2024



White – **56%** White – **39%**
 Black – **14%** Black – **79%**
 Hispanic – **46%** Hispanic – **47%**
 Other – **45%** Other – **39%**

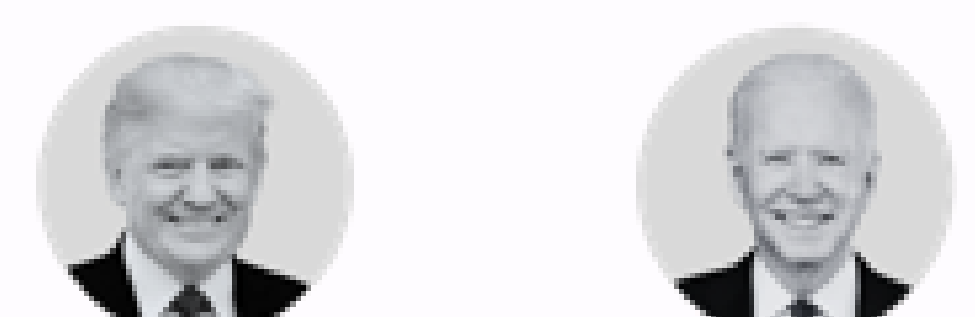
Education

September 2024



B.A. + – **35%** B.A. + – **61%**
 No B.A. – **56%** No B.A. – **38%**

July 2024

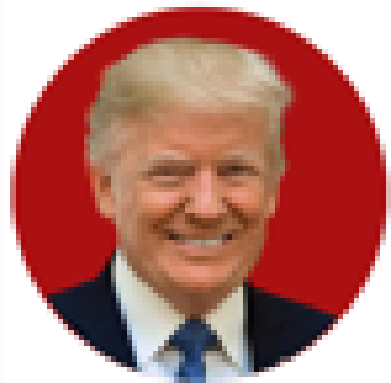


B.A. + – **37%** B.A. + – **55%**
 No B.A. – **58%** No B.A. – **35%**

ISSUE POLLING

Who do Americans trust more to handle key issues?

IMMIGRATION



+10

ECONOMY



+7

INFLATION



+7

ISRAEL/HAMAS WAR



+6

HEALTH CARE



+9

CRIME & SAFETY



+1

GUN VIOLENCE



+5

DEMOCRACY



+7

RACE RELATIONS



+16

SUPREME COURT



+5

ABORTION



+14

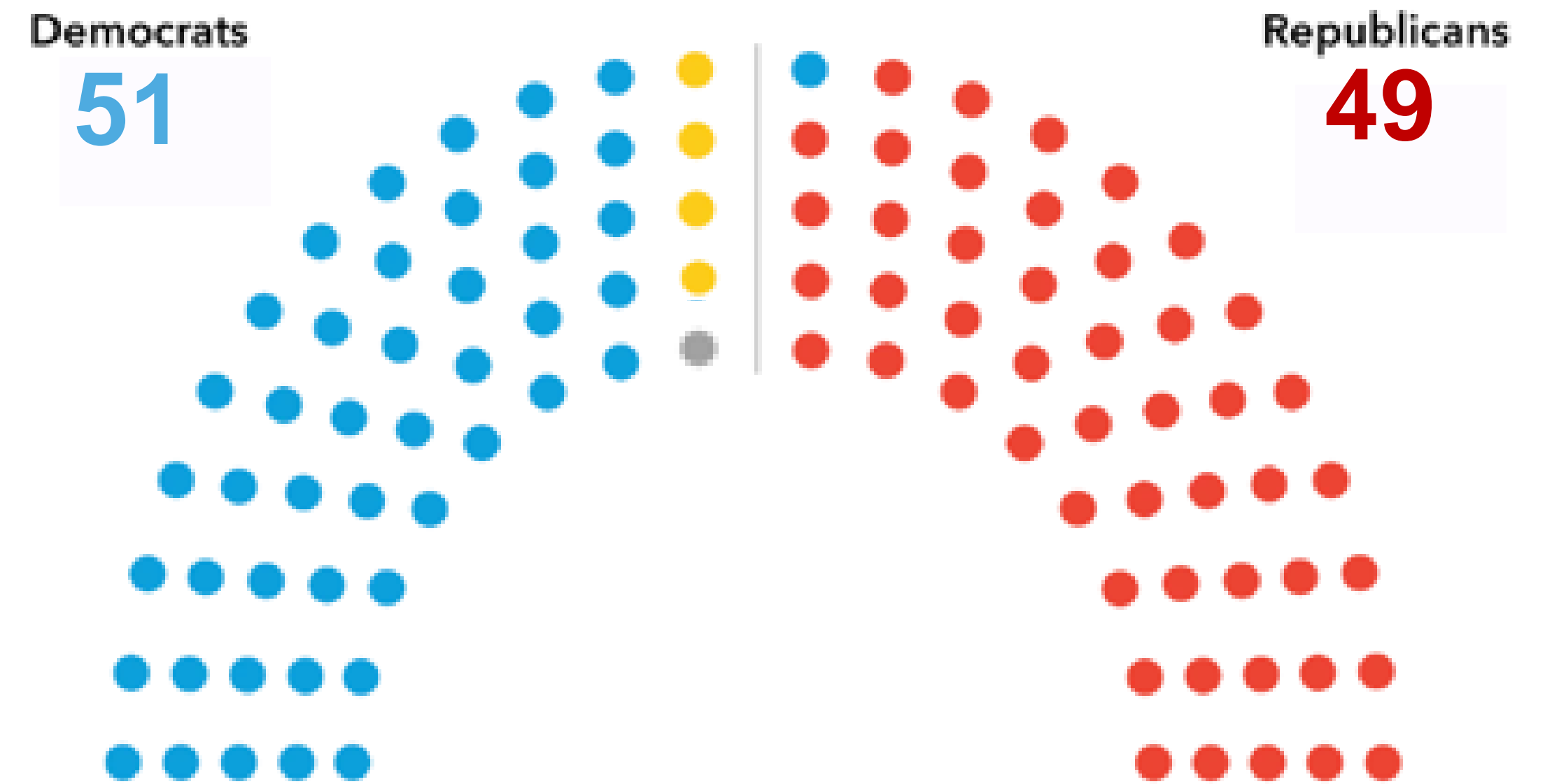
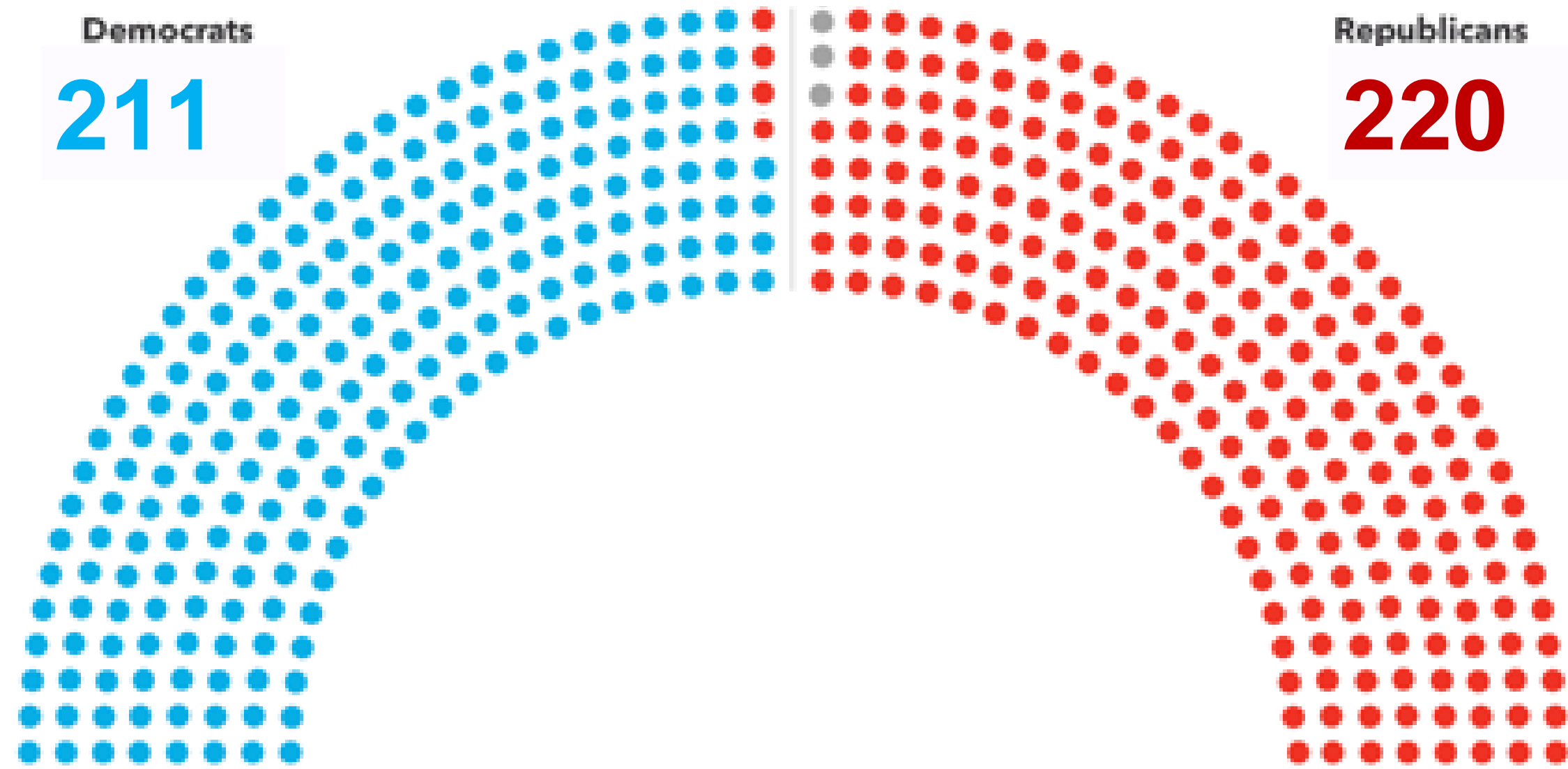
Click [here](#) or see Appendix A for a **key issue analysis** on Trump and Harris



CONGRESSIONAL PROJECTIONS



WHAT'S AT STAKE: CONGRESSIONAL BALANCE OF POWER



House of Representatives

All **435** House seats are contested in 2024

Democrats must flip **4** seats currently held by Republicans to gain a majority

Four Vacancies: NJ-09, NJ-10, WI-08, TX-18

U.S. Senate

34 Senate seats are contested in 2024

Races to Watch: AZ, PA, OH, NV, WI, MI, MT

*Map includes 4 Independents who participate in the Democratic caucus
VP Harris serves as tiebreaking 51st vote*

One Vacancy: NJ

*Sen. Bob Menendez (D-NJ) resigned in July following his conviction for taking bribes and acting as an agent of a foreign government. New Jersey Gov. Phil Murphy appointed **George Helmy** to fill Menendez's seat for the remainder of his term, which expires in January.*

119TH CONGRESS: SENATE PROJECTIONS

14 Solid Democrat*

1 Lean Democrat

4 Lean Democrat*
(WI, PA, NV, AZ)

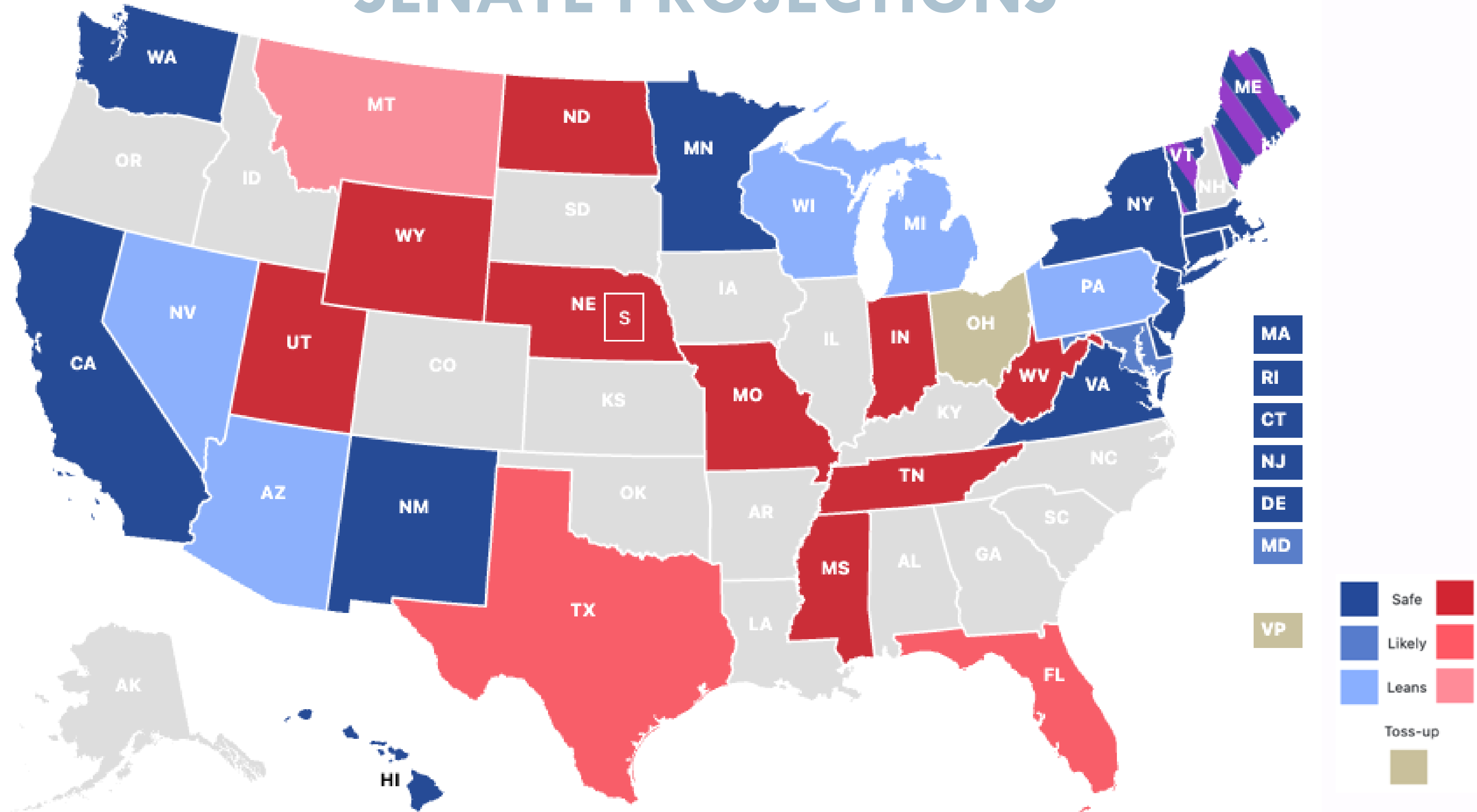
2 Toss-Up
(MI, OH)

**Includes Independents who caucus
with the Democratic Party*

10 Solid Republican

1 Lean Republican
(MT)

2 Likely Republican
(FL, TX)



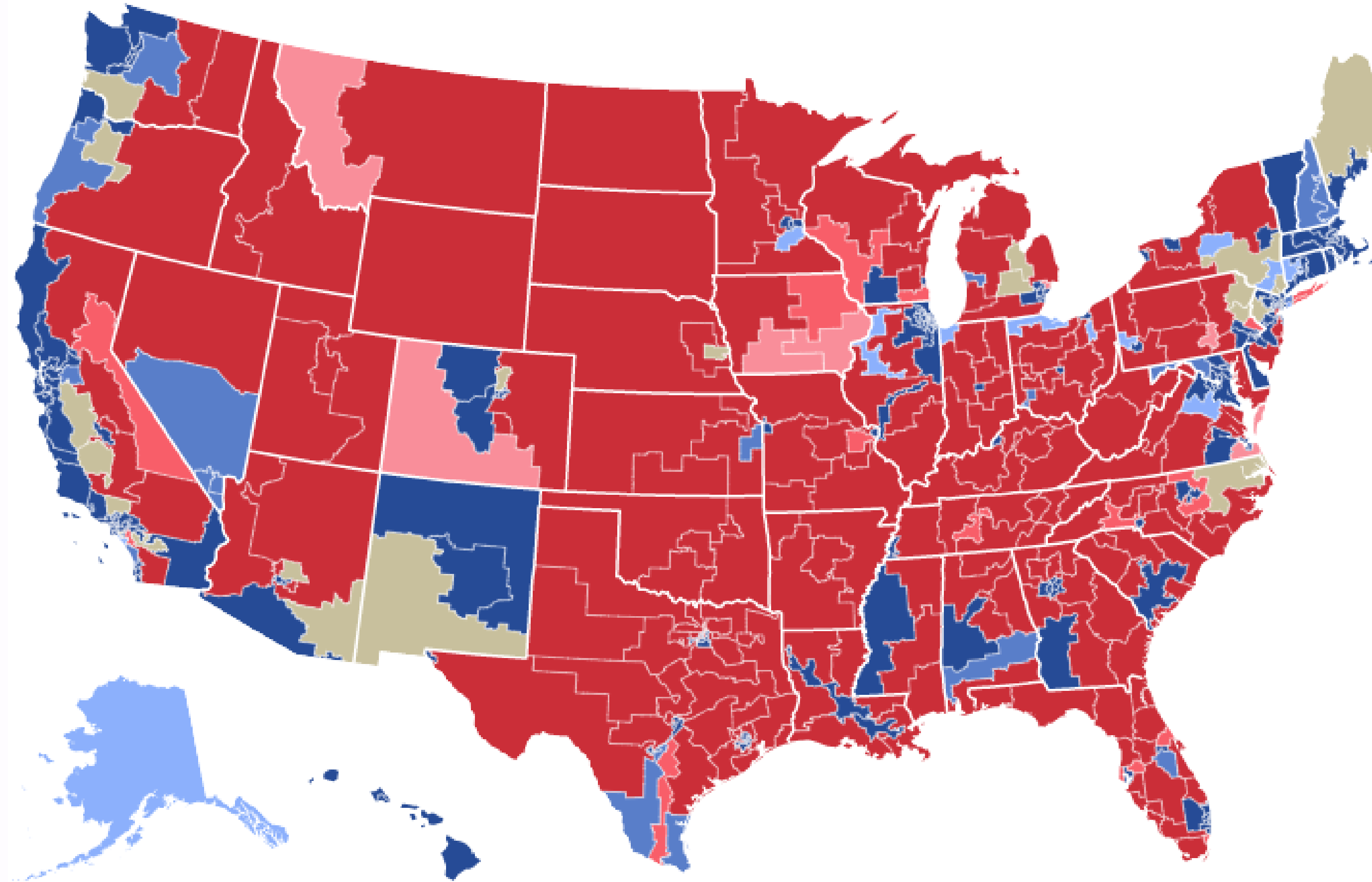
119TH CONGRESS: HOUSE PROJECTIONS

11 Toss-Up

13 Lean
Democrat

16 Likely
Democrat

174 Solid
Democrat



13 Toss-Up

6 Lean
Republican

10 Likely
Republican

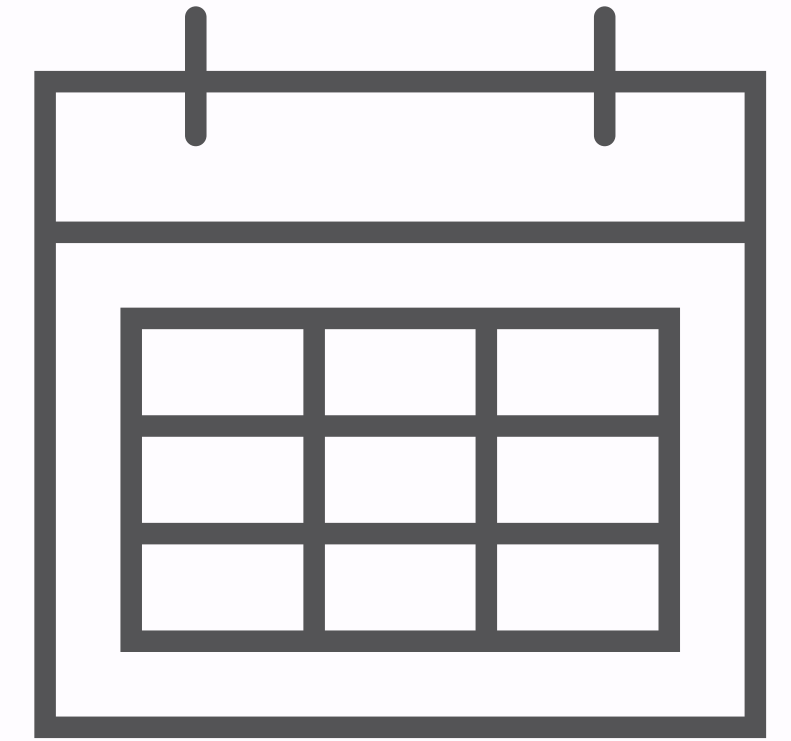
192 Solid
Republican

Totals: **203** Democrat **208** Republican **24** Toss-Ups
218 needed for majority

2024-2025 HEALTH POLICY OUTLOOK



KEY DATES FOR 2024-2025



November 5: Election day

November 12 to December 20: Post-election Lame Duck Session

December 31, 2024:

- Expiration of several healthcare priorities (telehealth flexibilities, physician pay relief, Community Health Centers, Alternative Payment Model bonus payments, and more)
- Expiration of Debt Ceiling suspension agreement

January 20, 2025: 47th President of the United States sworn in

December 31, 2025:

- Expiration of enhanced Affordable Care Act subsidies
- Expiration of Tax Cut and Jobs Act (TCJA) policies

LAME DUCK AGENDA

What gets done during the lame duck session will largely depend on the election outcome and whether there is a government spending deal. Issues at play:

- FY 25 Government Spending Deal (or CR)
- Telehealth extension
- Health care extenders (DSH, CHCs, NHSCs, special diabetes program, etc.)
- Site-neutral payments
- PBM policies
- Drug patent reforms
- Prior Authorization Restrictions



FACTORS SHAPING 2025 POLICY

ELECTION OUTCOME

“MUST PASS” ISSUES

- DEBT LIMIT
- TAX CUT AND JOBS ACT
- ACA ENHANCED SUBSIDIES
- APPROPRIATIONS
- NATIONAL DEFENSE AUTHORIZATION ACT

CONGRESSIONAL LEADERSHIP

- POPULISM VS. BUSINESS-FRIENDLY
- DEAL MAKERS VS. PARTISANS
- MODERATES VS. PROGRESSIVES

COMMITTEE LEADERSHIP AND
MAKEUP

HARRIS AND TRUMP ON HEALTHCARE

Protect the ACA & expand enhanced subsidies

Expand coverage options for people in Medicaid non-expansion states

Medicare dental, vision, hearing benefits

Address pharmaceutical patent abuses that block competition

Support for "march-in" rights to lower drug prices

Expand Insulin OOP Cap

Medical debt relief

Protect reproductive rights

Maternal health

Health equity

Drug price negotiation and importation

PBM reforms

More oversight/limits on provider consolidation

No Medicare cuts

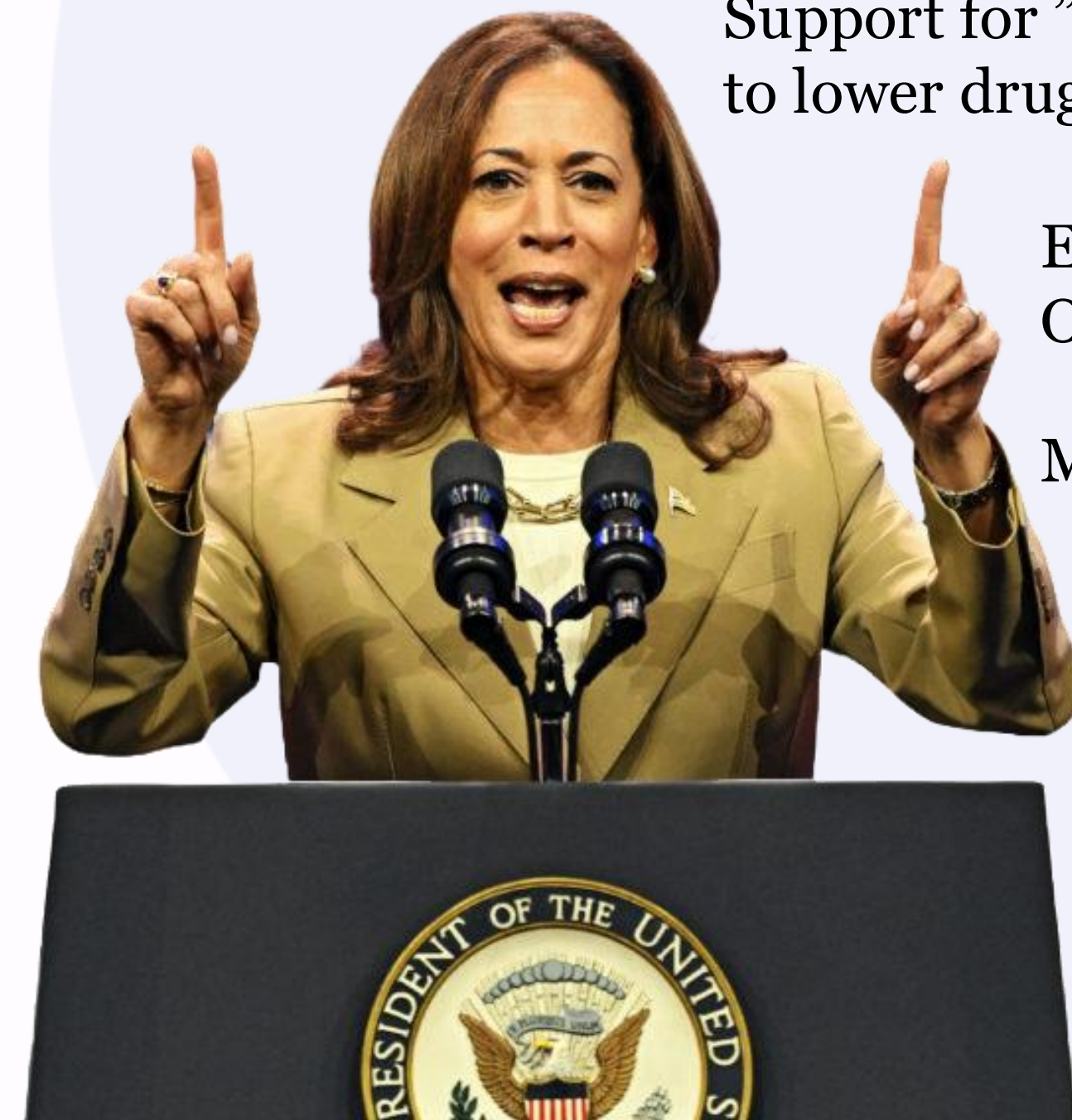
Increased competition and transparency

Expand coverage options outside of ACA

International reference pricing for drugs

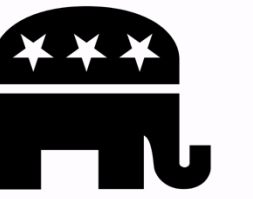
Regulatory red tape relief

Medicaid reforms





POTENTIAL HEALTH POLICY ISSUES FOR 2025



DEMOCRATS SWEEP

DIVIDED CONGRESS

REPUBLICANS SWEEP

Reconciliation bill to avoid 60 vote requirement in U.S. Senate

Expansion of Inflation Reduction Act’s prescription drug negotiation program

Extension of American Rescue Plan’s enhanced insurance subsidies

Coverage options for people living in Medicaid non-expansion states

Increased funding for Home and Community Based Services (HCBS)

Expanded access to mental health and substance use disorder treatment

Health equity

Limits on Medicare Advantage spending growth

Bipartisan negotiation to extend American Rescue Plan’s enhanced insurance subsidies and Tax Cuts and Jobs Act tax policies

Bipartisan negotiations over entitlement spending as part of debt ceiling increase

Continued focus on lowering prescription drug costs and restrictions on pharmacy benefit managers

Physician payment reforms

Medicare Advantage reforms

Continued oversight of healthcare consolidation

Higher likelihood of short-term policy extensions

Reconciliation bill to avoid 60 vote requirement in U.S. Senate

Medicaid reforms (e.g. block grants)

International reference pricing for prescription drugs

Limits on power and scope of federal public health bureaucracy

Regulatory “red-tape” relief for providers, insurers

Physician payment reforms

More coverage options outside of ACA mandates

Expanded use of HSAs, HRAs

Increased healthcare price transparency

QUESTIONS?

