2017 Gerry Haggerty Annual Leadership Institute

Plant...Harvest...Crush.
Planning for a Fruitful Financial Future

May 21 – 23, 2017
The Lodge at Geneva-On-The-Lake

Please join us for two days of education and entertainment!

Total HFMA Hours: 13.5
Total Ohio CPA CPE’s: 14.5
Attendee Registration Fees:

CLICK HERE to register online!

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<thead>
<tr>
<th></th>
<th>HFMA Member</th>
<th>HFMA Certified</th>
<th>Non-Member</th>
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<tbody>
<tr>
<td>Early Registration</td>
<td>$250</td>
<td>$225</td>
<td>$300</td>
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<tr>
<td>Registration After May 1</td>
<td>$280</td>
<td>$255</td>
<td>$350</td>
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<tr>
<td>Guest Rate [covers all meals and social activities]</td>
<td>$150</td>
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Hotel Information

The Lodge at Geneva-On-The-Lake
4888 N. Broadway
Geneva-On-The-Lake, Ohio 44041
http://www.thelodgeatgeneva.com/

Room Rates for May 21st- May 23rd: $115

Note: room rates for Suites is $159

Instructions for making reservations by phone:

1. Call 1-800-801-9982
2. Give check in & check out dates.
3. Tell the reservation line that you are with a group and give them the Group ID: 4GA4PQ
4. Provide the Group Name: HFMA Ghali Conference
5. Give them your credit card number.
6. At this time the credit card will be charged for the first night stay plus tax.
7. Wait for a confirmation number.

Reservations must be made before the room block expiration date of: Thursday, April 20, 2017

Reservations requested after this date will be subject to availability.

Room rates are quoted exclusive of local taxes and fees, currently 14.75%, as well as a $9.00 daily Resort Services Fee.
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Agenda At-a-Glance

SUNDAY
1:00pm – 6:00pm  Early Registration/Vendor Set Up [Exhibit Hall]

6:00pm – 9:00pm  Wine Tasting and Networking
You will be able to participate in a formal wine tasting or spend some time casually sampling the wines and enjoy the food and wine pairings!

MONDAY
HFMA: 7.5 credits
OSCPA: 8.0 credits

7:00am – 8:00am  Registration/Breakfast/Vendor Fair [Exhibit Hall]

8:00am – 9:00am  Community Benefit
Heidi Gartland Vice President University Hospitals

9:00am – 10:00am  Population Health Planning and Community Benefit in Northeast Ohio
Kirstin Craciun, MPP, MSW, Director of community outreach for The Center for Health Affairs

10:00am – 10:30am  Break/Vendor Fair [Exhibit Hall]

10:30am – 11:30am  Budgets and Benchmarks and Productivity...OH My! Leveraging Labor Cost Management Tools
Elaine Eichman, Manager – Management Engineering, Cleveland Clinic Foundation

11:30am – 1:00pm  Lunch/Vendor Presentation [Exhibit Hall]
Our vendors will take this opportunity to introduce themselves and their valuable products and services.

1:00pm – 2:30pm  The Leader shift Accelerating Your Leadership and Your Impact
Jeff Nischwitz Thought Leader & Speaker – President The Nischwitz Group

2:30pm – 3:00pm  Break/Vendor Fair [Exhibit Hall]

3:00pm – 4:00pm  Medicare Access and CHIP Re-authorization Act of 2015 (MACRA) – Strategic Readiness and Approach
Dan Clark – Director of Consulting - RSM US LLP (formerly McGladrey)
4:00pm – 5:00pm  **Vendor Roundtable**
You will be educated on how our Chapter Partners can help you *Plan for a fruitful financial future.*

5:00pm – 6:00pm  **Cocktail Reception [Exhibit Hall]**
After the Vendor Roundtable relax and enjoy a cocktail and time to network with other attendees, speakers and vendors.

6:00pm – 7:00pm  **Dinner [Exhibit Hall]**

7:00pm – 10:00pm  **Open Bar, Entertainment & Prizes**

  **Welcome Back: Casino Night [Exhibit Hall]**
Stick around after dinner and participate in HFMA Casino Night with Black Jack, Roulette, Craps and Poker. Welcome Back *Highrollers Entertainment.*

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**TUESDAY**

7:00am – 8:00am  **Registration/Breakfast/Vendor Fair [Exhibit Hall]**

8:00am – 9:30am  **Imperatives for Hospital Financial Performance**
*Eric Fontana – Managing Director*
*The Advisory Board Company*

9:30am – 10:00am  **Break/Vendor Fair [Exhibit Hall]**

10:00am – 11:00am  **Update on the State Operating Budget: Understanding How Evolving Policies Impact Your Ability to Plan for a Fruitful Financial Future**
*Daphne Kackloudis Saneholtz is a Partner at Brennan, Manna & Diamond*

11:00am – 12:00pm  **The Changing Role of the CFO**
*Lisa Hilling, CPA Principal and James Watson, CPA CIA Managing Principal CliftonLarsonAllen*

12:00pm – 1:30pm  **Lunch/HFMA Overview/New Officer Installation [Exhibit Hall]**
Join us for lunch, an overview of HFMA and the installation of the new HFMA Officers.

1:30pm – 3:00pm  **Healthcare Today: Hot Topics and Trends Shaping the Industry**
*Nikki DiFilippo, President and CMO - Via Ver Group will be coordinating a panel of experts*

3:00pm – 3:30pm  **HFMA Membership & Closing Remarks**

*HFMA: 6.0 credits  
OSCPA: 6.5 credits*
Programming Details
Total HFMA Hours: 13.5
Total Ohio CPA CPE’s: 14.5

Community Benefit
Heidi Gartland Vice President University Hospitals

Population Health Planning and Community Benefit in Northeast Ohio
Kirstin Craciun, MPP, MSW, Director of community outreach for The Center for Health Affairs

This presentation will highlight how recent state-level developments will impact future population health planning work in Northeast Ohio. An emphasis will be placed on describing how Northeast Ohio hospitals currently approach community benefit. The region’s key health challenges (including health disparities) and strengths will be described as well as current efforts to improve health outcomes.

1. Understand how state-level population health planning will impact population health planning in Northeast Ohio.
2. Recognize the different ways in which hospitals provide community benefit.
3. Have a clear grasp of Northeast Ohio’s key health challenges (including disparities) and strengths and how hospitals are responding.

Budgets and Benchmarks and Productivity...OH My! Leveraging Labor Cost Management Tools
Elaine Eichman, Manager – Management Engineering, Cleveland Clinic Foundation

Presentation will focus on utilizing national database comparative benchmarking in combination with productivity systems as tools for ongoing monitoring of labor costs, identification of efficiency opportunities and ongoing effective productivity management.

1. Understand the role of comparative benchmark analysis in labor cost management.
2. Leverage the productivity system as a tool for staffing decisions.
3. Identify opportunities for labor cost savings.

The Leader shift Accelerating Your Leadership and Your Impact
Jeff Nischwitz Thought Leader & Speaker – President The Nischwitz Group

It’s time for a change – time for a shift in what it means to lead and what it means to be a leader. A shift from doing to being. A shift from managing to creating. A shift from telling to asking. A shift from delegating to empowering. A shift from outcomes to impact. Welcome to leadership in the 21st Century!

1. Build trust, enhance relationship and communicate effectively
2. Build your team with questions, feedback and modeling
3. Build a culture of self-accountability with your team
Medicare Access and CHIP Re-authorization Act of 2015 (MACRA) – Strategic Readiness and Approach

Dan Clark – Director of Consulting - RSM US LLP (formerly McGladrey)

High level review of the MACRA legislation both the Merit Based Payment Systems (MIPS) and Advanced Payment Models APMs. Discussion of the key strategic drivers related to payment reform; quality drivers, bundled payments, population health...

1. Understand key goals of MACRA
2. Understand elements related to MIPS and APMs
3. Understand key strategic drivers related to improving organizational performance in a Quality Payment environment

Imperatives for Hospital Financial Performance

Eric Fontana – Managing Director – The Advisory Board Company

This session will discuss the three important key emerging strategic priorities for hospital leadership that require a closer look to optimize future margins, Revenue Cycle, Care Variation and Growth

1. Emerging revenue cycle challenges and how to address them
2. Imperatives for hospital and health system growth
3. Why clinical variation has risen to the top of the c-suite agenda

Update on the State Operating Budget: Understanding How Evolving Policies Impact Your Ability to Plan for a Fruitful Financial Future

Daphne Kackloudis Saneholtz is a Partner at Brennan, Manna & Diamond

The State must achieve a balanced budget by the end of the state fiscal year biennium in June 2017. The budget bill not only serves as the mechanism for doing this, but as a significant vehicle for policy and regulatory change. During this session, we will examine proposed changes affecting health care providers.

1. After this session, participants will understand the proposed policy changes likely to impact their business.
2. After this session, participants will have a better idea of the interplay between the federal and state policy environments and the resulting policies that will impact their business.
3. After this session, participants will be able to plan for policy changes that will impact their financial bottom lines and clinical programs.

The Changing Role of the CFO

Lisa Hilling, CPA Principal and James Watson, CPA CIA Managing Principal – CliftonLarsonAllen

With the seemingly never ending disruption in health care payment models and delivery systems, CFO’s are being forced to take on roles that go beyond their primary role as stewards of their organization’s finances. This presentation will address what CFO’s need to be considering as they prepare for bundled payments, population health strategies, cost reductions and managed care contracting.

1. Overview of evolving payment systems and their impact on the competencies of a financial leader.
2. Identify best practices that foster a working collaboration among hospitals, physician practices and post-acute providers.
3. Recognize the differences in language between departments and the steps (and tools) that will translate into an integrated management culture.
Healthcare Today: Hot Topics and Trends Shaping the Industry

Nikki DiFilippo, President and CMO - Via Ver Group will be coordinating a panel of experts

**Panelists:**

Ann Huston  
Chief Strategy Officer – Cleveland Clinic

JB Silvers, PhD  
John R. Mannix Medical Mutual of Ohio Professor of Health Care Finance and professor of banking and finance – Weatherhead School of Management, CWRU

Holly Perzy  
Executive Director – MetroHealth Select

How will technology make a difference in costs, adoption and outcomes? What kind of an economic model will make it work? Join us for a dynamic panel discussion with esteemed leaders offering perspectives on hot topics and trends shaping the healthcare industry.

1. Gain first hand insights represented through examples and panel discussions focused on hot topics and key trends identified by leaders within the health industry.
2. Identify financial implications, changes, and challenges that healthcare reform and technology present.
3. Provide guidance that will enable participants to develop their own strategies to maximize financial opportunities and manage risks that healthcare reform will create.

CLICK HERE to Register!