

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!

	HFMA Member	HFMA Certified	Non-Member
Early Registration	\$250	\$225	\$300
Registration <i>After May 1</i>	\$280	\$255	\$350
Guest Rate [<i>covers all meals and social activities</i>]	\$150	\$150	\$150

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: Financial and Social Returns on Investments**
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 – 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 & Learn [Exhibit Hall]**
Grab your lunch and take a seat! Two of our vendors will take this opportunity to introduce themselves and dive into how their products and services can bring value to your facility.
- 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.*

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 & Raffle [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, Partner – 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 Vera Group has coordinated a panel of experts JB Silvers, Professor of Banking and Finance at the Weatherhead School at CWRU will act as moderator.
Panelists:

<i>Ann Huston</i>	<i>Chief Strategy Officer – Cleveland Clinic</i>
<i>Holly Perzy, M.D.</i>	<i>Vice President, Care Delivery – MetroHealth System</i>
<i>Jim Pshock</i>	<i>CEO – Bravo Wellness</i>
<i>Charlie Loughheed</i>	<i>President/Chief Strategy Officer – IBM Watson</i>
- 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: Financial and Social Returns on Investments

Heidi Gartland Vice President University Hospitals

Federal and state governments grant tax exempt status to hospitals. Tax exemption is granted to certain organizations whose mission is to improve Nonprofit hospitals have a unique position as community benefit organizations. We know that with no money there is no mission but at the same time federal and state governments confer tax exempt status on hospitals so we can further the work for providing health and social welfare to our communities. It has been reported that the value of federal and state tax exemption is over \$12.6 Billion annually. This session will discuss the laws and regulatory landscape of nonprofit hospitals' community benefit obligations. We will discuss how the Patient Protection and Affordability Act expanded the requirements (in Section 501r) and created new obligations on nonprofit hospitals in the way of IRS reporting, billing and collection requirements, making financial assistance policies available widely in the community with a focus on vulnerable communities that are more likely to be uninsured. Finally, we will discuss how the State of Ohio is adding its own requirements on hospitals to assure we are meeting new requirements for contributing to and working with local health department in doing Community Health Needs Assessments and their implementation plans.

- 1. Understand what community benefit is and why health care finance professionals should understand nonprofit hospitals obligations under federal and state laws*
- 2. Discuss the pending state and federal health policy changes to the Affordable Care Act and how that can impact nonprofit hospitals and their community benefit obligations*
- 3. Understand the federal regulations pertaining to the 501r requirements relating to tax penalties for non-compliance, billing and collection restrictions, financial policy requirements and so on.*

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, Partner – 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

Panel Coordinator: Nikki DiFilippo, President and CMO – Via Vera Group

Moderator: JB Silvers, Professor of Banking and Finance – Weatherhead School at CWRU

Panelists:

<i>Ann Huston</i>	<i>Chief Strategy Officer – Cleveland Clinic</i>
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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!