

HFMA METROPOLITAN NEW YORK

63RD JOSEPH A. LEVI ANNUAL INSTITUTE

UNIONDALE MARRIOTT

HFMA Metro NY 2022-2023 President
Catherine Ekbom, CRCR, CHFP



Thursday & Friday

MARCH 23RD & 24TH
16 EDUCATIONAL CREDIT HOURS



2022-2023
Annual Institute Committee
Leah Amante, CRCR, Chair
Robert M. Braun, MHA, CRCR, FHFMA, Co-Chair
Nick Rivera, CPA, FHFMA, Vice Chair
Robin Ziegler, Vice Chair



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HFMA Metro New York Chapter is approved as a New York State CPE Provider in the area of specialized knowledge and applications. In accordance with the standards of the National Registry of CPE Sponsors the total credits have been rounded down. CPE Credits have been granted on a 50-minute hour.

General Information

The 63rd Joseph A. Levi Annual Institute program is intended to provide current practical information to financial professionals about policies and trends affecting major segments of the healthcare industry.

Registration Information

Certified Members: \$300

Healthcare Providers: \$300

Changes to \$325 after 2/25/23

Business Partner Members: \$400

Changes to \$450 after 2/25/23

Business Partner Non-Members: \$500

Changes to \$550 after 2/25/23

REGISTER TODAY HERE!

<https://cvent.me/OkkGm8>

Hotel Accommodations

Book your group rate for HFMA Attendee

You will find the information for your online reservation link below.

Annual Institute Attendee Pricing: \$180/night

*Last Day to Book: Wednesday, March 15th

<https://www.marriott.com/event-reservations/reservation-link.mi?id=1668792499370&key=GRP&app=resvlink>

COVID-19 Policy

The safety, health and well-being of our community remains our top priority at the Metro NY Chapter of HFMA. Proof of vaccination against COVID-19 will be required for all attendees, speakers and vendors of this event. By registering for this event, you are hereby attesting that you received full COVID-19 vaccination. Each day of the event, Evidence of Vaccination will be required along with a valid form of ID.

We know there are a lot of uncertainties surrounding the latest COVID-19 variant. If we cannot host an in-person event and transition to virtual, we will let you know as soon as possible.

CPE Accreditation

Participants will receive a certificate of attendance at the completion of each program reflecting the number of instructional hours earned. CPE requirements may differ by jurisdiction; therefore, participants should consult their reporting jurisdiction. All HFMA Metro NY education programs earn points toward HFMA Certification and Certification maintenance requirements.

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PLANNING COMMITTEE

Thank you to the
Joseph A. Levi 63rd Annual Institute
Committee Members!

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CRCR, FHFMA



Nick Rivera, CPA,
FHFMA
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Andrew Weingartner, FHFMA, CRCR



SCHEDULE AT A GLANCE

DAY ONE

Thursday, March 23rd, 7:30am-6:15pm

7:30AM - 8:15AM	REGISTRATION & BREAKFAST
8:15AM - 8:30AM	WELCOME & SPECIAL TRIBUTE
8:30AM - 9:30AM	NATIONAL HFMA UPDATE JOSEPH FIFER
9:30AM - 10:30AM	KEYNOTE DR. PATRICK O'SHAUGHNESSY
10:30AM - 11:30AM	NETWORKING & VENDOR FAIR
11:30AM - 12:30PM	ONE ON ONE W/ DR. MITCHELL KATZ
12:30PM - 1:30PM	LUNCH & VENDOR FAIR
1:30PM - 1:45PM	AFTERNOON OPENING REMARKS
1:45PM - 2:45PM	MOTIVATIONAL SPEAKER SCOTT CONARD, MD
2:45PM - 3:15PM	NETWORKING & VENDOR FAIR
3:15PM - 4:15PM	HEALTHCARE BUDGETING FOR THE FUTURE
4:15PM - 5:45PM	CFO PANEL DISCUSSION
5:45PM - 6:15PM	TRIBUTE TO JOSEPH FIFER
6:15PM - 9:00PM	PRESIDENT'S RECEPTION <i>* President's Extended Cocktail Reception</i>

DAY TWO

Friday, March 24th, 7:30am-4:00pm

7:30AM - 8:15AM	REGISTRATION & BREAKFAST
8:15AM - 8:30AM	WELCOME & OPENING REMARKS
8:30AM - 10:00AM	KEYNOTE MICHAEL DOWLING
10:00AM - 10:30AM	NETWORKING & VENDOR FAIR
10:30AM - 11:30AM	CEO PANEL TRANSFORMING THE DELIVERY OF HEALTHCARE
11:30AM - 12:30PM	NATIONAL CHAIRMAN'S THEME
12:30PM - 1:30PM	NETWORKING & LUNCH
1:30PM - 2:45PM	BEHAVIORAL & MENTAL HEALTH PANEL
2:45PM - 3:45PM	LEGISLATIVE UPDATE
3:45PM - 4:00PM	CLOSING REMARKS



FEATURED SPEAKERS

DAY ONE

Keynote Speaker



**Dr. Patrick O'Shaughnessy,
DO, MBA, FACEP, CHCQM**
President & CEO, Catholic Health

One on One



Dr. Mitchell Katz
President & CEO,
NYC Health + Hospitals

DAY TWO

Keynote Speaker



Michael Dowling
CEO, Northwell Health

Motivational Speaker



Scott Conard, MD
CEO, Converging Health, LLC



SPEAKERS



Joseph Fifer
President & CEO,
HFMA



Dr. Patrick O'Shaughnessy
President & CEO
Catholic Health



Dr. Mitchell Katz
MD, President & CEO
New York City
Health + Hospitals



Scott Conard
MD, CEO
Converging Health



Frank Stevens
Chief Growth Officer,
Strata



Mike DeAngelo
Director, Integrated Financial
Services, Yale New Haven Health



Laura DeSisto
Budget Director,
Boston Children's
Hospital



Kevin McBride
VP, Finance &
Performance
Management
Catholic Health



Dom Boulette
AVP of Budget &
Forecasting
Hospital for Special
Surgery



Michael Breslin
Group Senior Vice President,
Chief Financial Officer &
Treasurer
NewYork-Presbyterian



Gail Kosyla
EVP & CFO, Yale New
Haven Health



Joseph Wisnoski
Senior VP & CFO
Mather Hospital



Michael Dowling
President & CEO
Northwell Health



Arthur Gianelli
Chief Transformation
Officer & President
Mount Sinai Health
System & Mount Sinai
Morningside Hospital



Bruce Flanz
President & CEO
Medisys Health
Network



Aaron Crane
2022-2023
National Chair,
HFMA



Ian Shaffer
MD, President
Behavioral Health
Management
Solutions



Linda Rosenberg
Director of External
Relations, Columbia
University Department
of Psychiatry
Columbia University



Angela Terepka
MS, PsyD
Director of Psychology
NYC Health + Hospitals,
Elmhurst Hospital Center



Lawrence Ferber
PhD
Director of Behavioral
Health Central Intake
Services
Catholic Health



Dennis Whalen
Senior Vice
President, State
Government Affairs
Northwell Health



Wendy Darwell
President & CEO
Suburban Hospital
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Cristina Freyre Batt
VP, Federal Relations
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Matt Kudish
CEO
The National Alliance on Mental
Illness of New York City



David Woodlock
President & CEO
Institute for
Community Living, Inc.



Elisabeth Wynn
EVP, Health Economics
and Finance
GNYHA



Mark Bogen
President
Bogen Consulting Group



Gerard Walsh
President & CEO
Episcopal Health
Services



Errol Pierre
PhD, SVP, State
Programs
Healthfirst, Inc.



AGENDA

DAY ONE

Thursday, March 23rd, 7:30am-6:15pm

REGISTRATION & CONTINENTAL BREAKFAST
7:30AM-8:15AM

WELCOME &
OPENING
PRESENTATION

8:15AM-8:30AM

Emerald Society Presentation of Colors

Catherine Ekbom, CRCR, CHFP
President, Metropolitan New York Chapter, HFMA

NATIONAL
HFMA UPDATE

8:30AM-9:30AM

National HFMA Update

Joseph Fifer, CPA, FHFMA, President & CEO, HFMA

HFMA President and CEO Joe Fifer will discuss the implications of HFMA's key strategic initiatives, offer perspectives on recent events, and discuss success imperatives for legacy healthcare stakeholders.

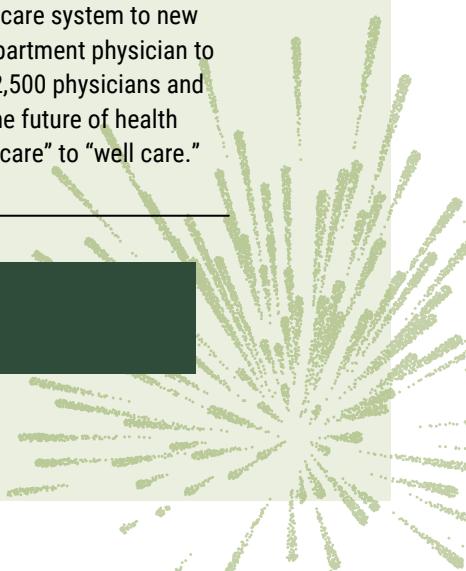
KEYNOTE
SPEAKER

9:30AM-10:30AM

Dr. Patrick O'Shaughnessy, DO, MBA, FACEP, CHCQM, President & CEO, Catholic Health

When describing Dr. Patrick O'Shaughnessy, words like innovative, inspiring and passionate immediately come to mind. As president and chief executive officer of Catholic Health, "Dr. O" is steering his Long Island-based health care system to new heights. Hear all about his personal journey from emergency department physician to chief medical officer to leader of Catholic Health's 6 hospitals, 2,500 physicians and 16,000 employees. Dr. O'Shaughnessy will share his vision for the future of health care and discuss how the delivery of care is evolving from "sick care" to "well care."

NETWORKING BREAK & VENDOR FAIR
10:30AM - 11:30AM



AGENDA

DAY ONE

ONE ON ONE
WITH DR.
MITCHELL
KATZ

11:30AM - 12:30PM

East Coast to West Coast and the Return Home to New York

Dr. Mitchell Katz, President & CEO, NYC Health & Hospitals

Hosted by:

Errol Pierre, PhD. Senior Vice President State Programs, Healthfirst

Hear Dr. Katz's amazing story of how he lead the Los Angeles County Health Agency and helped to eliminate \$270 million budget deficit by increasing revenues and slashing administrative expenses. As President & CEO for NYC Health & Hospitals, Dr. Katz will share the current state of NYC Health & Hospitals and his vision for the future of healthcare delivery in the New York Metropolitan area

NETWORKING LUNCH
12:30PM - 1:30PM

AFTERNOON
REMARKS

1:30PM - 1:45PM

Leah Amante, CRCR

63rd Annual Institute Chair, Metropolitan New York Chapter, HFMA

HFMA Metro NY Event Charity, Tunnels to Towers Foundation

The HFMA Metro NY Chapter has a long standing history of supporting national and local charities. For this year's Annual Institute chapter president, Catherine Ekbom has selected to support the Tunnel to Towers Foundation. The Tunnel to Towers Foundation was established in 2001 in response to the events of 9/11/2001. The foundation assists first responders and our military servicemen and women. We ask that you please consider supporting the Tunnel to Towers Foundation and be as generous as you can.



AGENDA

DAY ONE

MOTIVATIONAL SPEAKER

1:45PM-2:45PM

Scott Conard, MD, Founder & Partner, Convergent Health

Hear Dr. Conard's inspiring perspective on how to transform healthcare by providing more convenience, increasing access, significantly improving quality, and lowering cost. Dr. Conard firmly believes challenges can be best met with innovation, technology and accountability, and that "greater convenience, increased access, higher quality, and lower costs" are not mutually exclusive.

NETWORKING BREAK & VENDOR FAIR

2:45PM - 3:15PM

HEALTHCARE BUDGETING FOR THE FUTURE

3:15PM - 4:15PM

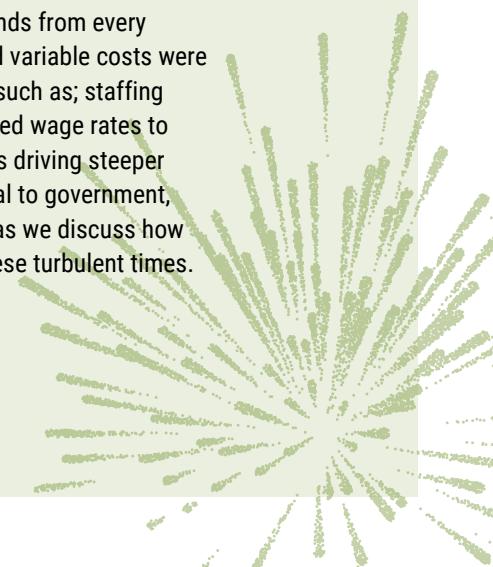
Moderator:

Frank Stevens, Chief Growth Officer, Strata

Panelists:

- **Mike DeAngelo, MHA, Director, Integrated Financial Services, Yale New Haven Health**
- **Laura DeSisto, MBA, Budget Director of FP&A and Decision Support, Boston Children's Hospital**
- **Dom Boulette, MBA, AVP of Budget & Forecasting, Hospital for Special Surgery**
- **Kevin McBride, VP, Finance & Performance Management, Catholic Health**

The financial healthcare landscape continues to face headwinds from every direction. Prior to the pandemic, reimbursement methods and variable costs were areas of concern. Post-pandemic we face struggles in areas such as; staffing shortages with supplemental premium agency usage, enhanced wage rates to enhance recruitment and retention, global supply chain issues driving steeper inflation than ever before, shifts in payer mix from commercial to government, clinical variation, and investments in infrastructure. Join us as we discuss how northeastern hospitals are readjusting and dealing with to these turbulent times.



AGENDA

DAY ONE

CFO PANEL DISCUSSION

4:15PM - 5:45PM

Moderator:

Mark Bogen, President, Bogen Consulting Group

Panelists:

- **Michael P. Breslin, CPA, Group SVP, CFO & Treasurer, NewYork-Presbyterian**
- **Gail W. Kosyla, MBA, EVP & CFO, Yale New Haven Health**
- **Joseph Wisnoski, SVP & CFO, John T. Mather Hospital, Northwell Health**

Since the beginning of the COVID-19 pandemic three years ago, hospitals and health systems have faced numerous challenges and pressures as they continue to adapt and navigate in the changing health care landscape. Hospitals and health systems continue to experience a host of challenges, including rising costs, workforce shortages, supply chain issues, and increased reporting and scrutiny by regulators and payors. Various stakeholders' reports indicate hospitals and health systems across the country are facing negative margins and financial pressures as they try to manage the wellbeing of health care organizations with needed investments for long-term financial sustainability. During the CFO Panel, hear how different hospitals and health systems are navigating the economic strain, what they are doing to help secure their organizations financially, and how they are managing the financial operations in the time of disruption.

TRIBUTE TO JOSEPH FIFER

5:45PM-6:15PM

Tribute to Joseph Fifer & Congratulations on Retirement

SOCIAL & NETWORKING EVENT: PRESIDENT'S RECEPTION 6:15PM - 9:00PM

Please join us as we end Day One with an extended President's Reception, all are welcome! Great time to catch up with old and new colleagues!



AGENDA

DAY TWO

Friday, March 24th, 7:30am-4:00pm

REGISTRATION & CONTINENTAL BREAKFAST
7:30AM-8:15AM

WELCOME &
OPENING
REMARKS

8:15AM-8:30AM

Andrew Weingartner, FHFMA, CRCR
President-Elect, Metropolitan New York Chapter, HFMA

KEYNOTE
SPEAKER

8:30AM-10:00AM

Michael Dowling, President and CEO, Northwell Health

We are proud to have Michael Dowling, Modern Healthcare's selection as America's most influential leader in healthcare, serve as our Friday Keynote. Please join us as Mr. Dowling shares his thoughts and perspective on the warp speed evolution of the healthcare industry. Touching upon such topics as, gun violence, health disparities, immigration, artificial intelligence, the expansion of ambulatory care and home as hospital.

NETWORKING BREAK & VENDOR FAIR
10:00AM - 10:30AM



AGENDA

DAY TWO

TRANSFORMING
THE DELIVERY
OF HEALTHCARE

10:30AM-11:30AM

Moderator:

Aaron Crane, FHFMA, CPA, 2022-2023 HFMA National Chair

Panelists:

- **Arthur A. Gianelli, FACHE, Chief Transformation Officer, Mount Sinai Health System, President & CEO, Mount Sinai Morningside**
- **Bruce Flanz, President & CEO, Medisys**
- **Gerard Walsh, President & CEO, Episcopal Health Services**

Past, Present & Future State: A look back as how we got here and where the delivery of healthcare is headed. In the wake of the pandemic, we have witnessed the ability and agility of hospitals and health systems to transform the delivery of care to meet patient needs. Hear from industry leaders as they describe their journey and vision for the future of healthcare. Touching upon topics such as access, equity, quality, reimbursement and patient satisfaction.

NATIONAL
CHAIRMAN'S
THEME

11:30AM-12:30PM

Ignite The Spark

Aaron R. Crane, FHFMA, CPA, 2022-2023 HFMA National Chair

Today's U.S. healthcare system is like an unmanaged forest filled with deadwood and underbrush. The result is low-quality metrics at the greatest expense in the world compared to other developed nations. Healthcare finance professionals, however, are in a position to "ignite the spark" that brings about necessary change and innovation.

NETWORKING LUNCH
12:30PM - 1:30PM



AGENDA

DAY TWO

BEHAVIORAL &
MENTAL
HEALTH PANEL:
POST-PANDEMIC
AND THE
BEHAVIORAL
HEALTH CRISIS

1:30PM-2:45PM

Moderator:

Ian Shaffer MD, MMM, CPE, *President, Behavioral Health Management Solutions, LLC.*

Panelists:

- **Matt Kudish**, *Executive Director of the National Alliance on Mental Illness*
- **Linda Rosenberg**, *Director of Psychology, Columbia University*
- **Angela Terepka**, MS, PsyD, *Director of Psychology at NYC Health + Hospitals, Elmhurst Hospital*
- **David Woodlock**, *President & CEO of Institute For Community Living, Inc.*
- **Lawrence Ferber**, PhD, *Director of Behavioral Health Central Intake Services, Catholic Health*

The impact of the worldwide pandemic has been traumatic. While we emerge from the pandemic and regaining normalcy, we must continue our awareness of the needs of our most vulnerable members of society. This panel of behavioral health professionals will discuss how we might combat the challenges; access and the increasing demand for services, recruitment/retention of mental health professionals, public policy and funding.

LEGISLATIVE
UPDATE

2:45PM - 3:45PM

Moderator:

Dennis Whalen, *SVP, State Government Affairs, Northwell Health*

Panelists:

- **Elisabeth Wynn**, *EVP, Health Economics and Finance, Greater New York Hospital Association*
- **Wendy Darwell**, *President & CEO, Suburban Hospital Alliance of NYS, LLC, Nassau-Suffolk Hospital Council & Northern Metropolitan Hospital Association*
- **Cristina Batt**, *VP, Federal Relations, HANYS*

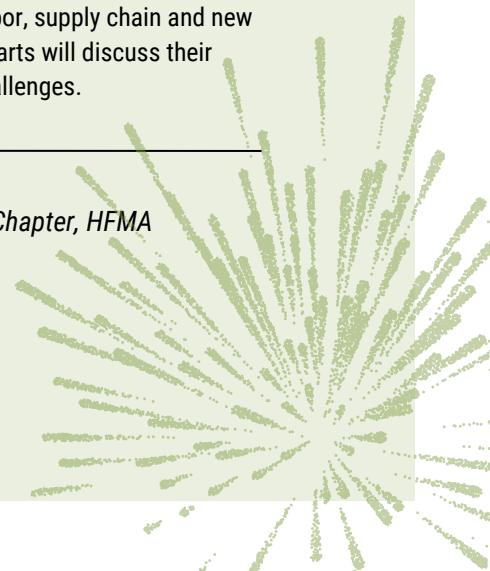
Hospitals and health systems are facing many regulatory challenges as we move from a pandemic to an endemic. Hear from our local industry leaders as they discuss the challenges facing the healthcare industry, including; labor, supply chain and new regulatory reporting requirements. These healthcare stalwarts will discuss their advocacy strategies and plans to help us combat these challenges.

CLOSING
REMARKS &
RAFFLE
DRAWING

3:45PM-4:00PM

Robert M. Braun, MHA, CRCR, FHFMA

63rd Annual Institute Co-Chair, Metropolitan New York Chapter, HFMA



Chapter Leadership

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FHFMA, CRCR
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Leah Amante, CRCR
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Chapter Leadership

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2020-2021	Donna Skura
2019-2020	Diane McCarthy, FHFMA
2018-2019	Mario Di Figlia, FHFMA
2017-2018	Maryann J. Regan
2016-2017	David Woods, MBA

EX-OFFICIO

All Past Presidents of the Metropolitan New York Chapter, HFMA

Dedication

Joseph A. Levi was one of the founding fathers of the Metropolitan New York Chapter of the Healthcare Financial Management Association, serving twice as its President during 1957-1958 and 1961-1962.

Mr. Levi was the chapter's first certified fellow (1957) and received the following awards for service to the chapter:

- 1961 - The William A. Follmer, Bronze Merit Award
- 1968 - The Robert H. Reeves, Silver Merit Award
- 1972 - The Frederick T. Munci, Gold Award
- 1970 - The Stephen A. Ryan Memorial Award

In 1978, the National Board of Directors presented Joe with the Frederick C. Morgan award for outstanding contributions to the field of healthcare financial management.

In 1983, the Annual Institute was renamed to memorialize Joseph A. Levi; a friend, teacher, administrator, professional and dedicated worker.

We will never forget him.



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