

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

*Recognizing*



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



NYS Education Department Sponsor License # 000337

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

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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

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### **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

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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

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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!

## CHAIR



**Leah Amante, CRCR**

## CO-CHAIR



**Robert M. Braun, MHA,  
CRCR, FHFMA**



**Nick Rivera, CPA,  
FHFMA  
Vice Chair**



**Robin Ziegler  
Vice Chair**

## COMMITTEE MEMBERS

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Kiran Batheja, FHFMA  
Alyson Belz, FHFMA  
Daniel Corcoran  
Mario DiFiglia, CPA, FHFMA  
Cristina Edwards  
Catherine Ekblom CRCR, CHFP  
David Evangelista  
Stephanie Gerez CRCR, CHFP  
Diann Jones, CRCR, CSMC  
Matt Kamien, CHFP, CRCR  
James Linhart

Ann McDonald, CRCR  
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Patrick McDonough  
Samer Oweis, CRCR, CHFP, CSPR  
Gabriel Pomerantz  
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Meredith Simonetti, FHFMA  
Sean Smith, CPA, FHFMA  
Donna Skura  
Shivam Sohan, FHFMA, CRCR  
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

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### 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

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### 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  
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**Dom Boulette**  
AVP of Budget &  
Forecasting  
Hospital for Special  
Surgery



**Michael Breslin**  
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**Gail Kosyla**  
EVP & CFO, Yale New  
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**Joseph Wisnoski**  
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**Michael Dowling**  
President & CEO  
Northwell Health



**Arthur Gianelli**  
Chief Transformation  
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System & Mount Sinai  
Morningside Hospital



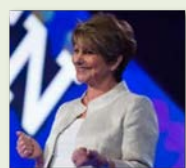
**Bruce Flanz**  
President & CEO  
Medisys Health  
Network



**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



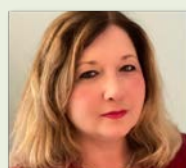
**Angela Terepka**  
MS, PsyD  
Director of Psychology  
NYC Health + Hospitals,  
Elmhurst Hospital Center



**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  
Alliance of NYS, LLC,  
Nassau-Suffolk Hospital  
Council, and Northern  
Metropolitan Hospital



**Cristina Freyre Batt**  
VP, Federal Relations  
HANYS



**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.

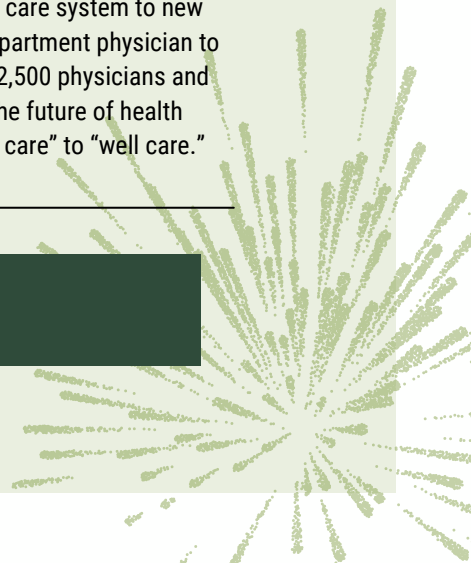
KEYNOTE  
SPEAKER

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

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ONE ON ONE  
WITH DR.  
MITCHELL  
KATZ

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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

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NETWORKING LUNCH  
12:30PM - 1:30PM

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AFTERNOON  
REMARKS

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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 Ekbohm 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

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### CFO PANEL DISCUSSION

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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

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5:45PM-6:15PM

***Tribute to Joseph Fifer & Congratulations on Retirement***

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**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

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### TRANSFORMING THE DELIVERY OF HEALTHCARE

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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

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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.

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NETWORKING LUNCH  
12:30PM - 1:30PM



# AGENDA

## DAY TWO

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### 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

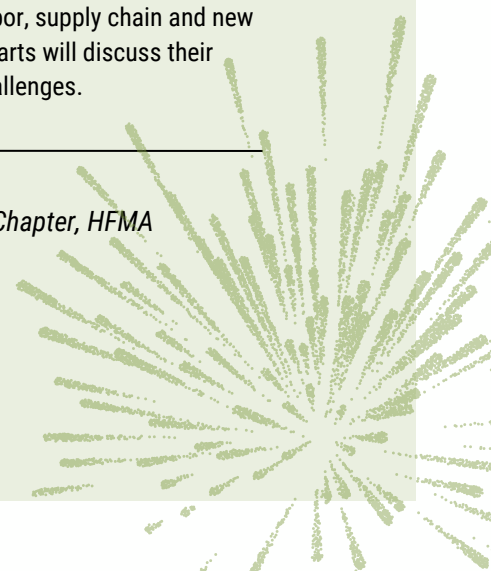
Hospitals and health systems are facing many regulatory challenges as we move from a pandemic to an endemic. Hear from our local industry leaders as they discuss the challenges facing the healthcare industry, including; labor, supply chain and new regulatory reporting requirements. These healthcare stalwarts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

## 2022-2023 OFFICERS



Catherine Ekbom, CRCR, CHFP  
President



Andrew R. Weingartner,  
FHFMA, CRCR  
President Elect



Shivam Sohan, FHFMA, CRCR  
VP Education



Alyson Belz, FHFMA  
Treasurer



Leah Amante, CRCR  
Secretary



Sean P. Smith, CPA, FHFMA  
Immediate Past President

## 2023-2024 BOARD OF DIRECTORS

### Class of 2023



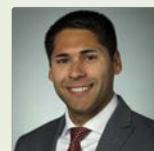
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Nick Rivera,  
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Alicia Weissmeier,  
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### Class of 2024



Robert M. Braun, MHA,  
CRCR, FHFMA



Susane  
Lim



Matthew Kamien,  
CHFP, CRCR



Robin  
Ziegler



Stephanie Gerez,  
CHFP, CRCR

# Chapter Leadership

## PAST PRESIDENTS

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Immediate Past President	Sean Smith, CPA, FHFMA
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

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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.

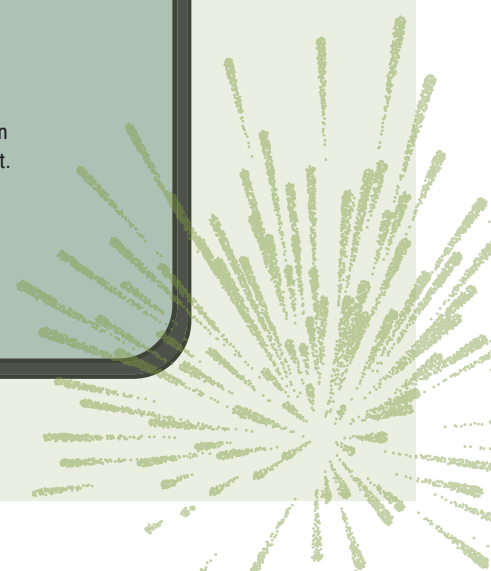
Mr. Levi was the chapter's first certified fellow (1957) and received the following awards for service to the chapter:

- 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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