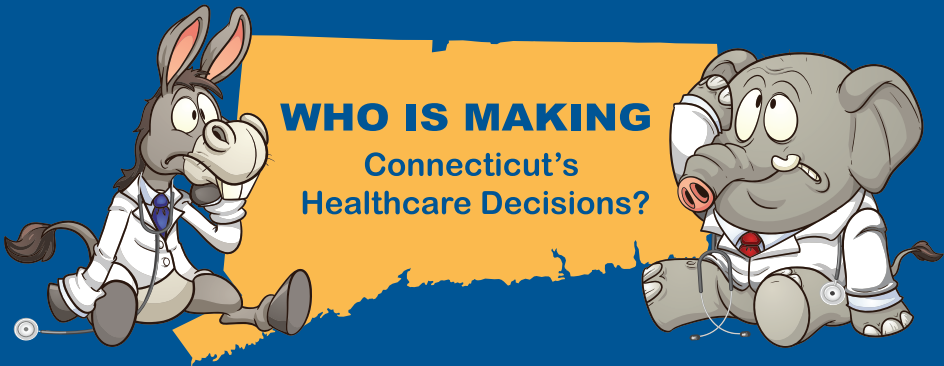


# CT HFMA 66<sup>th</sup> ANNUAL MEETING



Thursday, September 14, 2017  
Aqua Turf Club  
Plantsville, CT 06479



Morgan Stanley

# Preparing for the future? Let's have that conversation.

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Where Meets  
**Passion Purpose**

It's where the magic happens, where goals are achieved,  
and where the impossible becomes possible.

I believe everyone has a special purpose, and those of us called to healthcare finance have a unique role as we are met each day with the challenge of reimagining and transforming what we know into what patients and their families need and deserve. It's a calling to stewardship of lives, relationships, and resources, and it allows us the privilege and honor to serve others every day in both small and big ways. As a result, we are blessed to see the impact of our work in—and through—the lives of others.

Some days, however, the worries and demands of an endless list of challenges can get in the way of living our story and making our mark. At such times, it's important to find ways to reignite our sense of purpose and sustain our passion for what we do. That's why my goal as HFMA Chair is to encourage my fellow healthcare finance professionals to find their "sweet spot"—that place where passion meets purpose.

Pursuing one's passion, however, is not for the faint of heart. It's an endeavor that demands our best and requires an internal fire, a fearless perseverance, and an unwavering commitment to doing whatever it takes to make our goals and

visions a reality. It also requires us to be present, innovative, and grateful—and to never forget why we do what we do.

An important benefit of being driven by passion and purpose is that it allows us to leverage the "power of one." A single person, event, conversation, or encounter has the power to impact someone's life. And by tapping into that power, we can multiply our impact by influencing and inspiring others who then turn around and do the same. Just imagine what we could achieve if our industry were full of passionate, purposeful people! My vision is to make that our reality and our legacy.

I'm profoundly grateful for this opportunity to serve as Chair of the HFMA Board of Directors, and I look forward to further exploring these and other ideas and issues with you over the next 12 months. In the meantime, I hope you'll take some time to think about your own story. What motivates you, and what kind of mark do you want to make? Answering such questions can put you on the path to your own "sweet spot."

**Carol A. Friesen, FHFMA, MPH**  
*2017-2018 HFMA National Chair*



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## Thank you for attending the 2017 CT HFMA Annual Meeting

Please take a few minutes to our survey we've left on your table. Your input helps us improve Chapter events.

We hope to see you at future  
CT HFMA events

### ANNUAL MEETING COMMITTEE

Frank Miceli, Chairman

Megan Budd

Jodi DePalma

Sarah Ginnetti

Gary Goetz

Andrew Lis

Joe Pajor

Susan Prior

Shannon St. Hilaire

Matt Schuster

Eric Wetherell





## Welcome to the:

# 2017 CT HFMA Annual Meeting

## Message from the CT HFMA President

It is my distinct privilege to welcome you, on behalf of our board of directors, our officers and our dedicated volunteers, to the 66<sup>th</sup> Annual Meeting of the Connecticut HFMA Chapter.

We are one of 68 chapters nation-wide that maintain the relentless pursuit of fiscal stewardship, collaboration and forward-thinking ideals in a tumultuous healthcare landscape.

This past year, our team of CT HFMA volunteers has been working tirelessly to bring several enhancements and premier events to your chapter experience to life. Some of those enhancements and events include:

- A contemporary website with intuitive navigation and relevant content
- A successful series of brewery tours throughout the state to enhance our social networking footprint
- The first CT HFMA Women in Leadership event this past March, funded through an HFMA national innovation award received by our chapter
- Perennial educational events of the Revenue Cycle Academy, Accounting Update and our Legal and Legislative Event, and more, rolling up to more than 5,000 education hours for the year
- The Continuum of Care Symposium, linking physicians, acute care, and post-acute care providers
- Our blockbuster annual golf tournament in May at the Fox Hopyard Golf Club with more than 100 participants as a precursor event to the Region 1 Annual Conference at Mohegan Sun

For the coming year, I am pleased to share that our chapter is continuing with several key initiatives to strengthen its value and purpose as your local connection to HFMA. A few of those initiatives include:

- A modernized registration platform to ease the end-user experience
- An outlined succession plan for future leadership engagement of our chapter

- Ongoing collaboration with other industry partners around the state such as the Connecticut Hospital Association, the Connecticut Medical Group Management Association, the Yale and the Connecticut Society of CPAs so that we can bring you a more comprehensive view into the healthcare landscape

Outside of these strategic initiatives, what we value the most is both the input and engagement of our membership.

As the market continues to shift and evolve, it becomes even more imperative that you continuously feed us with information to best meet your needs professionally. There is tremendous value in being a member of HFMA, and it is our role as local chapter leaders to help convey the extent of that value to you, so that we are a reliable source and link to what is happening in the financial management sector of healthcare in Connecticut.

Beyond the basic benefits and value of membership, the true reward has come to those of us who have been volunteers for many years and appreciate being your eyes and ears back to national HFMA. I hope to inspire you to learn more about volunteerism.

Some of the most talented and open-minded individuals I have come to know and appreciate are my fellow CT HFMA volunteers from all four corners of the state. In my experience, it has been worth its weight in gold professionally to have a network of colleagues so engaged and well-versed in the current climate of our state healthcare economy, its dynamic changes and sensibilities, for what is to come.

As your chapter president, I urge you to contact me, one of my fellow board members, or one of our committee members, if you would like to learn how you can serve your local chapter.

Our purpose comes from developing a chapter that is meaningful to YOU, so please let your voice be heard!

**Sarah Ginnett**

*2017-2018 CT HFMA President*



# CT HFMA 2017 – 2018 Officers and Directors

|                                |                                    |
|--------------------------------|------------------------------------|
| President .....                | Sarah Ginnetti, MBA, MHA           |
| President-elect .....          | Megan Budd, CPA                    |
| VP Membership .....            | Gary Goetz, MHA                    |
| VP Programs .....              | Christina Steiner                  |
| Treasurer .....                | Xhemil (John) Koliani, CPA, ABV    |
| Secretary .....                | Denise Smith, COC, CPC, CPMA, CEMC |
| Immediate Past President ..... | Susan Prior                        |

## Board of Directors

### Class of 2018

Chad Bianchi, CPA, MBA, CHFP  
Andrew Lis, CPA, FHFMA  
Michael Rosadini, CPA  
Amanda Kelly  
Eric Wetherell, CPA

### Class of 2019

Kyle Dunleavy  
Scott Frazer  
Frank Miceli, FHFMA, MBA, CPA  
Matt Schuster  
Shannon St. Hilaire, MBA-HCM, FHFMA

# Individual Volunteer Recognition Awards

## HFMA National Founders Awards

The Healthcare Financial Management Association (HFMA) and the Connecticut Chapter recognizes that its strength lies in volunteers, who contribute their time, ideas, and energy to serve the healthcare industry, their profession, and one another. The Founders Merit Award Series acknowledges the contributions made by HFMA members. It is based on points a chapter volunteer earns through various committee and leadership activities.

### The William G. Follmer Bronze Award

This award is presented when a chapter volunteer has earned 25 member points. This award is named after William G. Follmer, who is credited with the creation of the American Association of Hospital Accountants (AAHA, now HFMA).

### The Robert H. Reeves Silver Award

This award is presented when a chapter volunteer has earned 50 total member points. Robert H. Reeves was an organizing member of the AAHA, elected its president in 1956 and was instrumental in creating the structure of AAHA.

### The Frederick T. Muncie Gold Award

This award is presented to a member who has earned a total of 75 member points. This award honors Frederick T. Muncie, an organizing member of the AAHA, and the first president of the association (1947-1949). Muncie also assisted in the organization of the first AAHA chapter (First Illinois).

### The Founders Medal of Honor

This award is conferred by HFMA National through nomination of the Chapter Board of Directors. This prestigious award recognizes an individual who has been actively involved in HFMA for at least three years after earning the Muncie Gold Award, has provided significant service at the chapter, regional and/or national level in at least two of those years, and remains a member in good standing.

## 2016 - 2017 Founders Awards

### Follmer Bronze

Megan Budd  
Kyle Dunleavy  
Scott Frazer  
Patrick Garvey  
Andrew Lis  
Christina Steiner

### Muncie Gold

Sarah E. Ginnetti  
Gary Goetz

### Reeves Silver

Gary Goetz  
Xhemil (John) Koliiani





# 2016-2017 National Chapter Awards

HFMA's chapter awards and recognition program is designed to provide incentives and recognition of chapter activities to achieve results as defined by Davis Chapter Management System policy. It is intended to focus chapters on important activities that add value for members or the Association while simultaneously encouraging innovation and improvement.

## Award of Excellence for Certification - Bronze

Bill Wollman

## Chapter Member Awards Connecticut Chapter Distinguished Service Award

This award is presented by the Chapter in appreciation of a member's sustained dedicated service and commitment spanning multiple years.

## Other Chapter Awards

### President's Pin

Sarah E. Ginnetti

### Past President's Plaque

Susan Prior

# Who Is Making Connecticut's Healthcare Decisions?

CT HFMA Annual Meeting – September 14, 2017

Aqua Turf Club

**8:15 – 8:45 am Registration and Networking**

**8:45 – 9:00 am Welcome & Opening Remarks**

**9:00 – 9:30 am Healthy CT: A Retrospective Analysis**

Ken Lalime, former CEO of Healthy CT. Ken will provide an overview of the challenges the insurance carrier faced under a rapidly changing political landscape and the Affordable Care Act.

**9:30 – 11:15 am Leadership Challenges in Today's Healthcare Political Environment**

Moderated by Ken Lalime, our diverse panel of payers and providers will discuss the current state of the healthcare industry under an uncertain federal and state legislative environment.

*Panelists include:*

**Stephen Allegretto, CPA, MPH** – VP, Strategic Analytics and Financial Planning at Yale New Haven Health System

**Paul T. Liistro** – CEO & Managing Partner – Arbors of Hop Brook Limited Partnership  
Vernon Manor Health Care Center; Administrator, Manchester Manor Health Care Center

**Steve O'Dell** – President, Coordinated Regional Care – Prospect Medical Holding, Inc.

**Deremius Williams** – VP, Provider Solutions at Anthem BCBS of Connecticut

**11:30 – 12:00 pm HFMA Board of Directors Installation and Awards Presentation**

**12:00 – 1:00 pm Lunch**

**1:00 – 2:30 pm Wit and Wisdom to Super Charge Your Day, Tim Richardson**

Tim is the author of Jump Starts: Wit and Wisdom to Super Charge Your Day, co-author of Transformation Thinking: Tools and Techniques That Open the Door to Powerful New Thinking and contributing author to Meditations for the Road

**2:45 – 4:30 pm State Legislative Panel**

Back by member feedback, a panel of state legislative experts will provide honest insight in dealing with healthcare legislation.

**4:30 pm Networking Reception and Event Raffle**

HFMA Connecticut Chapter | 701 Hebron Avenue – Third Floor | Glastonbury, CT 06033



## Meet the Sponsoring Vendors of the 2017 CT HFMA Annual Meeting Event Raffle

We could not put on this fine event without our **Sponsors**. Please take a few minutes to greet each one. If time is an issue please visit those vendor sponsors that have products that are of interest to you.

Now, as an added incentive, we are offering some great prizes. **You must be present to win. We will draw the winner between 5:30 and 5:45 p.m.**

When you meet one of the sponsors, please share your business card or fill out an index card (available at the registration desk). Your business card will be added to the raffle for that vendor sponsor booth.

### How will we pick the winners?

Each vendor will be assigned a number. We will first pick a number. Next, we will announce the prize. We will then select a business card from the corresponding vendor booth.

We hope you ALL participate. Best of Luck!



## **Ken Lalime**

*Principle, KRLHealth*

Ken is a lifelong Connecticut resident with over 35 years of experience in the health care arena. Ken is the past Executive Director of the Connecticut State Medical Society-IPA (CSMS-IPA), a 7,000-physician member independent practice association. Prior to the CSMS-IPA, Ken was the Chief Operating Officer at The Physicians Corporation; the business development manager at Primergy; and he held numerous management positions throughout a 17-year tenure at Norwalk Hospital. Ken was also co-owner of Cranbury Pharmacy in Norwalk and is a member of the Norwalk Board of Health since 1994.

Ken was most recently the Chief Executive Officer of HealthyCT (the Connecticut based health insurance CO-OP) and was responsible for strategic planning, as well as the overall coordination of infrastructure development and regulatory oversight. Ken's vision for HealthyCT was to develop a progressive health plan that facilitates the delivery of efficient, evidence-based medical care through a consumer-focused and patient-centered health care delivery model.

C: 203.627-0583  
E: [klalime@gmail.com](mailto:klalime@gmail.com)



**Steve Allegretto, BA, CPA, MPH**

*Vice President, Value Innovation and Strategic Analytics  
Yale New Haven Health System*

Steve Allegretto is the Vice President, Value Innovation and Strategic Analytics for Yale New Haven Health System, a \$4.4B health system with over 24,000 employees located primarily in Connecticut. He has been at Yale-New Haven Hospital/Yale New Haven Health System for close to 30 years, serving in a variety of financial and operational roles. He is a certified public accountant with an undergraduate degree in economics from Fairfield University and a master's degree in public health from Yale University.

He has had various teaching responsibilities at Yale School of Medicine's Epidemiology and Public Health Program, Quinnipiac University and Sacred Heart University. Steve has a deep interest in demonstrating how the actual application of integrated clinical, operational and financial data drives actual improvement in patient care quality and cost while generating opportunities for value innovation and venture creation



## Paul T. Liistro

*CEO & Managing Partner – Arbors of Hop Brook Limited Partnership; Vernon Manor Health Care Center; Administrator, Manchester Manor Health Care Center*

Paul Liistro is an accomplished businessman with a range of experience in the healthcare, retirement and housing industry in Connecticut. His healthcare interests include the Arbors of Hop Brook, a continuing care retirement community located in Manchester; Manchester Manor, a skilled nursing facility, also located in Manchester; and, Vernon Manor located in Vernon. The nursing centers specialize in post-acute care, dementia care and long-term care services. His health care businesses have earned many industry awards for outstanding quality including Awards from the American Health Care Association, US News and World Report and Centers for Medicare and Medicaid Services (CMS).

In 2010, Manchester Manor and Vernon Manor were recognized by the American Health Care Association for outstanding quality. In fact, Manchester Manor was awarded an AHCA Quality Award at the Gold level, only the 10th Gold level award in the 17 years of the program, and the only award granted to independent owner. The quality award program is based upon the criteria in Malcolm Baldrige Award for Excellence in Health Care. In January 2012, Vernon Manor was recognized by US NEWS and WORLD REPORT as one of the best nursing homes in Eastern CT. CMS have recognized his facilities as 4 Star and 5 Star health facilities. In June 2017, Manchester Manor was recognized by CMS as being in the top 1% of nursing homes in the US. From 1995 through 2015, these

properties have been accredited by CARF-CCAC. Additionally, he has been involved with the design, construction and management of several Active Adult communities around the Hartford area.

His previous business experience includes positions in marketing and accounting with General Foods, General Mills and Price Waterhouse.

Paul has a plethora of affiliations outside of his business activities. Paul has been an active member of the CT Association of Health Care Facilities which represents over 170 for profit and non-profit skilled nursing facilities in Connecticut. Currently, he holds the position of the immediate past Chair of the Association. As President, he is actively involved in the national organization representing long term care in Washington DC, the American Health Care Association (AHCA) which designated him as a Future Leader in healthcare in 2009. In 2012, he was elected to the Board of Governors for the American Health Care Association, serving a 4-year term.

In 2012, Paul was appointed to the Qualidigm Board of Directors; the CMS designated Quality Improvement Organization in CT which assists physician, hospitals, nursing homes and homecare organizations to improve quality in the delivery of healthcare. He has served as Chair of the BOD since 2014.

He also is a member of the University of Connecticut's Business School's advisory committee for health care and insurance studies. This committee advises on the curriculum, supports undergraduates, and participates in the development of future health care managers.

He attended Georgetown University, holds a BA in Economics from Bowdoin College and an MBA from the Wharton School of the University of Pennsylvania.

On a personal note, he is married living in Westport and has two adult daughters. He enjoys perennial gardening, sailing, building kayaks, snowboarding and inline skating. He is a member of St. Luke's Church. And amusingly, his wife Brenda is a marketing executive in an Italian company which designs and markets feeding systems for infants and toddlers. So, between the two of them they provide services and products for life's continuum.



## **Steve O'Dell**

*President, Coordinated Regional Care  
Prospect Medical Holdings, Inc.*

Steve O'Dell joined Prospect Medical Holdings, Inc. in December, 2012 and is now President of Coordinated Regional Care. Steve is responsible for aligning our hospitals, medical groups and individual practice associations (IPAs) and outpatient facilities and clinics to achieve the lowest cost with the highest demonstrated quality in each of our current and new regional markets. He is responsible for working with our market business unit leaders to contract with health plan strategic partners to increase our managed care market share and to assume and manage value-based, global financial risk for both current and new patient populations to improve quality, patient experience and financial results.

Prior to joining Prospect, Steve was senior

vice president at Molina Healthcare, Inc., which operates managed care plans in numerous states serving Medicaid and Medicare beneficiaries and is the Medicaid fiscal intermediary in five additional states. Steve was responsible for enterprise-wide strategic planning, business development, new market start-ups and healthcare reform readiness. Prior to that, Steve was responsible for Molina's western region health plans and staff model clinics in California, Washington, Utah, New Mexico and Texas serving more than one million of the company's members. Previously, Steve held senior executive managed care positions with Blue Cross Blue Shield, United Healthcare, FHP International and First Consulting Group.



## **Demerius Williams**

*Vice President, Provider Solutions  
Anthem BlueCross BlueShield of Connecticut*

Demerius Williams is a member of the leadership team of Anthem Blue Cross and Blue Shield in Connecticut, serving as Vice President of Provider Solutions. In this capacity she is responsible for Anthem's end to end network management activities, including provider contracting, provider relations, payment innovation, provider collaboration and strategic network initiatives designed to enhance value with respect to the total cost of care experience in the market place. Demerius has been with Anthem for 13 years, starting with the company in 2004. She was quickly and often promoted over the years, and has comprehensively and effectively represented Anthem in a number of company imperatives. Her history is one of consistent growth, expansion of responsibility and includes a track record of successful business results. She is a collaborative and inspiring leader who is keen on relationship management and focuses on enhancing the

capabilities of others to achieve results that are broadly beneficial to multiple constituents.

Prior to joining Anthem, Demerius spent time at both CIGNA and ConnectiCare within the network management arena. Demerius is a recognized health care leader in Connecticut with a wealth of contracting, reimbursement, payment innovation and cost of care knowledge, and is well-respected by the provider community and other key health care stakeholders.

Outside of Anthem, Demerius is recognized as a community leader. Among other appointments, she recently served on the board of the Leukemia and Lymphoma Society of Connecticut, which named her as their Woman of the Year in 2011, and has held multiple leadership roles within her home church, the Faith Congregational Church in Hartford, CT. Demerius is also the proud mother of two beautiful children and when she is not busy working, volunteering and mothering, she shares her gift of song in various venues.

Demerius holds a Bachelor's Degree in Human Development and Family Studies from Cornell University and a Master's Degree in Health Policy and Management from New York University. Her vast experience in provider solutions, knowledge of the Connecticut market, strong provider relationships, leadership skills and disciplined focus serves the Connecticut market well as Anthem continues to meet and exceed its customers' needs in our evolving and increasingly complex market place.





## Tim Richardson

*Author*

Tim Richardson has been a full time professional speaker since 1988. He has also owned two other businesses and been the host of a radio talk show interviewing authors, business owners, and community leaders.

Tim received a Bachelor of Science degree in Business Administration from Florida Southern College in 1984 and a Master of Science degree in Marketing Communication from Florida State University 1988. While at FSU, he taught courses in communications. Tim earned the designation of Certified Speaking Professional (CSP) given by the National Speakers Association in 1997.

Previous to starting his company, Tim worked for IBM Corporation in the Marketing Division. He was recognized for his outstanding contributions at IBM with the President's Circle Award for team service, given only to 1% of IBM employees. Tim has worked as a seminar leader with CareerTrack, North America's largest seminar company and as a trainer for Creative Training Techniques

International (the Bob Pike Group). Tim also worked as Director of Training for a luxury Five Diamond resort.

In addition to his business responsibilities, Tim is active in several professional organizations. He is a member of the National Speakers Association and the founder of the North Florida Professional Speakers Association where he served two terms as President. He is founder and president of the Bill Walter Melanoma Research Fund and co-founder and board member of the Jeffry Roth Cycling Foundation. He also serves on a task force to help reduce childhood obesity and is a fund raising coordinator for the Boy Scout district where lives.

Tim is author of **Jump Starts: Wit and Wisdom to Super Charge Your Day**, co-author of **Transformation Thinking: Tools and Techniques That Open the Door to Powerful New Thinking** and contributing author to **Meditations for the Road**. His latest book he is writing is titled *How to Live Rich in a World Consumed with Cash, Career, and Conquest*. He has been interviewed on regional and national TV and radio programs and writes articles for national publications.



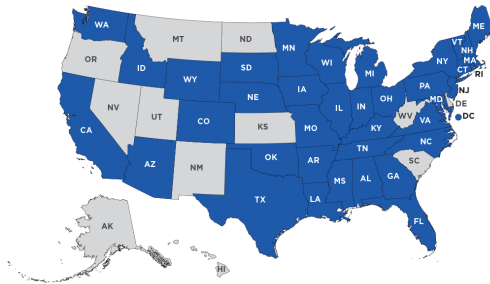
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