

# Joseph A. Levi

## 51st Annual Institute

February 25-26, 2010

The LaGuardia Marriott Hotel

East Elmhurst, NY

### *Healthcare Reform: Balancing Cost, Quality, Access and Care – Putting it All Together and Making it Count*

Presented By the Metropolitan New York Chapter  
Healthcare Financial Management Education Foundation

14.75 Educational Credit Hours



# Thursday, February 25, 2010

- 7:30 – 8:30 AM**      **Registration and Continental Breakfast**
- 8:30 – 8:45 AM**      **Welcome and Opening Remarks**  
Cynthia A. Strain, FHFMA, President, Metropolitan New York Chapter, HFMA  
David Evangelista, Chairman, Joseph A. Levi 51st Annual Institute
- 8:45 – 9:15 AM**      **National HFMA Chairman's Remarks: Making it Count**  
**Speaker:** Cathy Jacobson, CPA, FHFMA, 2009-2010 National HFMA Chairman
- 9:15 – 10:30 AM**      **Latest From Washington**  
Updates out of Washington DC, including Medicare and Capital Hill, and how it is expected to impact the healthcare sector specifically, hospital reimbursement.  
**Speaker:**  
Leslie Norwalk, Esquire, Strategic Counsel to Epstein, Becker & Green, Former Administrator CMS
- 10:30 – 11:00AM**      **Networking Break and Vendor Fair**
- 11:00 – 12:30 PM**      **Financial Leadership: CFO's Taking the Lead**  
A moderated discussion by Hospital CFO's confronting significant issues of leadership with respect to financing, payment vehicles and health care delivery. Our panel will explain their unique view of the expanding role of a Hospital CFO, given the current economic state of the nation and likely Healthcare Reform considerations.  
**Moderator:** Raymond Sweeney, Executive Vice President, Healthcare Association of NY State  
**Panelists:**  
Jerry Haas, CFO, Senior Vice President Finance, South Nassau Communities Hospital  
Cathy Jacobson, CPA, FHFMA, CFO & Treasurer, Senior Vice President of Strategic Planning & Finance, Rush University Medical Center, Chicago, Illinois  
Phyllis Lantos, FHFMA, Executive Vice President, CFO & Treasurer, New York Presbyterian Hospital  
Donald Scanlon, Executive Vice President of Business & Finance, CFO, The Mount Sinai Medical Center  
Robert Shapiro, CPA, Senior Vice President & CFO, North Shore-LIJ Health System
- 12:30 – 2:00 PM**      **Networking Lunch with Dessert in Vendor Fair**  
Presentation on the benefits of HFMA Membership
- 2:00 – 2:15 PM**      **National HFMA Update and Perspective on Healthcare Reform**  
**Speaker:** Richard Clarke, DHA, FHFMA, President & CEO, HFMA
- 2:15 – 3:45 PM**      **Leading Within the New Landscape of Healthcare Reform- A CEO's Perspective**  
Hear from industry leaders on the highly debated topic of health reform; their reactions to proposed legislation, their strategies for adjusting to a potentially new delivery system and their thoughts on navigating the rough terrain ahead.  
**Moderator:** Richard Clarke, DHA, FHFMA, President & CEO, HFMA  
**Panelists:**  
Stanley Brezenoff, President & CEO, Continuum Health Partners  
Michael Dowling, President & CEO, North Shore-LIJ Health Systems  
Robert Levine, President & CEO, Peninsula Hospital Center  
Joseph Quagliata, President & CEO, South Nassau Communities Hospital
- 3:45 – 4:30 PM**      **Networking Break and Vendor Fair**
- 4:30 – 6:00 PM**      **"Operating in the Red": The Impact of Healthcare Reform on NY State**  
Join us for a presentation on the implementation of healthcare reform in New York State. Hear about the New York State Executive budget deficit and the key points that will effect all health care providers. What will be the impact of Federal Healthcare Reform on New York State.  
**Moderator:** Irwin Birnbaum, JD, Senior Advisor RWJ Clinical Scholars Program, Yale University  
**Panelists:**  
Deborah Bachrach, JD, Former Deputy Commissioner for the New York State Health Department's Office of Health Insurance Programs (OHIP)  
Betsy McCaughey, PhD, Founder and Chairman of Committee to Reduce Infection Deaths. Former Lieutenant Governor of New York State  
Kenneth E. Raske, President & CEO, Greater New York Hospital Association  
Daniel Sisto, President, Healthcare Association of New York State
- 6:00 – 7:30 PM**      **Social & Networking Event: Chapter President's Reception**

# Friday, February 26, 2010

**7:30 – 8:15 AM Registration**

**8:15 – 8:30 AM Welcome**

Edmund P. Schmidt III, President-Elect, Metropolitan New York Chapter, HFMA

**8:30 – 9:30 AM Breakfast Presentation:**

## **“Four Generations in the Workplace: Searching for the Common Ground”**

Today’s workforce is experiencing a new phenomena-four distinct generations at work, many times, in equal leadership positions. Cam Marston has studied the collective histories and traits of each generation to uncover what makes the Matures, Baby Boomers, Gen X-ers, and Gen-Yers tick.

The author of *Motivating the “What’s In It For Me?” Workforce*, Marston helps bring out the best in your employees and colleagues.

**Speaker:** Cam Marston, Multi-Generational Relations and Workplace Communications Expert

**9:30 – 11:15 AM New York State Office of the Medicaid Inspector General Update**

Participants will be provided with an up-to-the minute summary of what the OMIG has been working on and where it will focus in the future. You can’t afford to miss this timely session that will supply information that will impact all attendees. Interactive discussion to follow presentation.

**Moderator:** Lynn Stansel, Esquire, Vice President & Counsel, Compliance, Montefiore Medical Center

**Speaker:** James G. Sheehan, NYS Medicaid Inspector General

**11:15 – 11:45 AM Networking Break and Vendor Fair**

**11:45 – 12:45 PM Congressional Update on Healthcare Reform**

Congressman Jerrold Nadler will be speaking on the impact of the upcoming Healthcare Reform bill in Congress and how it affects the Healthcare Industry. Interactive discussion to follow presentation on Healthcare Reform and other Healthcare related areas of interest.

**Speaker:** The Honorable Jerrold Nadler, United States House of Representatives

**12:45 – 2:30 PM Lunch Presentation: Case Study: Healthcare Reform Readiness Assessment (HRAA)**

A case study will be presented with the results of a Healthcare Reform Readiness Assessment (HRAA) conducted with multi-hospital systems, community hospitals and academic medical centers in 2009 and 2010. The HRAA was designed to assist health systems in self-assessing their preparedness for healthcare of the future in seven areas related to reform. A CFO participant will join the panel to show how the assessment aided the system in organizing to prepare for reform.

### **Speakers:**

Wayne Cafran, Managing Director, KPMG

Susan Davis, Director, KPMG

**1:30 - 1:45PM Closing Remarks**

Palmira Cataliotti, CPA, FHFMA, Co-Chair Joseph A. Levi 51st Annual Institute

## **General Information**

*The 51st 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.*

**Vendor Fair:** All registrants will be able to share valuable ideas and information throughout the event.

**Dress Code:** Business dress is suggested for all sessions

**For up-to-date chapter or conference information visit our chapter website at [www.hfmametronny.org](http://www.hfmametronny.org)**

## **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 it’s 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, 1968- The Robert H. Reeves*

*1972- The Frederick T. Munci, 1970- The Stephen A. Ryan Memorial*

*In 1978 the National Board of Directors presented Joe with the Frederick C. Morgan award for outstanding contributions to the field of health care 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.***

# Chapter Officers and Board of Directors

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Kenneth E. Raske, President, Greater New York Hospital Association  
Kevin W. Dahill, President & CEO, Nassau-Suffolk Hospital Council

## **REGISTRATION FEES:**

### **Before or on December 31, 2009**

Certified Members	\$299.00
HFMA Members	\$299.00
Non-members	\$400.00

### **After January 1, 2010**

Certified Members	\$300.00
HFMA Members	\$350.00
Non-members	\$450.00

**NOTE: ON SITE REGISTRATION WILL RESULT IN AN ADDITIONAL \$50.00 FEE ADDED TO THE FEES LISTED ABOVE**

### **REGISTRATION IS A GUARANTEE OF PAYMENT. NO REFUNDS ARE ISSUED**

Substitutions are permitted on an equal fee basis. If the substitute does not qualify for the rate paid they are responsible for the difference.

## **HOTEL INFORMATION**

**LaGuardia Marriott Hotel**, 102-05 Ditmars Boulevard, East Elmhurst, NY 11369 • (718) 565-8900

For guaranteed group rates call (718) 565-8900 • \$149.00 Single/Double Hotel Room

HFMA has reserved a limited block of rooms at the host hotel at this preferred rate. Preferred rates will be held until February 1, 2010 or while rooms are available. Please call the hotel directly and mention HFMA Annual Institute Vendor Room Block to ensure your preferred rate. If you chose to book online the group code is: fmamaa. You are responsible for making your own hotel reservations, including changes and cancellations

## **SCHEDULE CHANGES**

Occasionally, it may be necessary to re-schedule or cancel programs. Registrants will receive advance notice of such changes. Metro NY Chapter of HFMA cannot be responsible for any penalties incurred as a result of such changes. All changes will be posted to the chapter website at [www.hfmametrony.org](http://www.hfmametrony.org)

## **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.

# METRO NY 51st JOSEPH A LEVI ANNUAL INSTITUTE REGISTRATION FORM

**Meeting Code 1041NY1**

**3 WAYS TO REGISTER**

1. **FAX** this form to 708-531-0665
2. **MAIL** the form with payment:  
**HFMA**  
**Dept 77-6063, Chicago, IL 60678-6063**
3. **ONLINE CREDIT CARD REGISTRATION:**  
[http://www.hfma.org/events/chapter/MetroNY022510\\_022610.htm](http://www.hfma.org/events/chapter/MetroNY022510_022610.htm)

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Are you a current HFMA Member?  Yes (Member # \_\_\_\_\_)

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**Registration is a guarantee of payment. No refunds will be issued. Substitutions are permissible.**

On or Before December 31, 2009

Certified Member \$299.00

Member \$299.00

Non-Member \$400.00

On or After January 1, 2010

Certified Member \$300.00

Member \$350.00

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Check enclosed (Payable to: HFMA Education Foundation)

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**Register by 12/31/09 to qualify for the discount**

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