20th Annual CFO Forum

August 18-19, 2021

Renaissance Charleston Historic District Hotel
68 Wentworth Street
Charleston, SC 29401

Wednesday, August 18

12:00 – 12:15pm **Welcome & Lunch**
Christian Soura | Executive Vice President | SCHA

12:15 – 1:00pm **Capital Markets Update: Navigating Turbulent Times**
Liz Sweeney | President | Nutshell Associates (Huntington Technology Finance)
After a year of upheaval, the healthcare industry is enjoying renewed public appreciation for the vital role it plays. But does that translate to improved access to capital? This session will focus on market conditions and credit trends in the healthcare industry, with a focus on how COVID impacted hospitals operationally and financially, current capital market conditions and credit viewpoints, and what analysts are looking for going forward.

1:00 – 1:45pm **Current Audit Topics and Effective Strategies for Defending Audits**
Alice Harris | Member | Nexsen Pruet
This presentation will address the latest trend in payor audits and strategies to successfully manage these audits.

1:45 – 2:00pm **Networking Break**

2:00 – 2:45pm **The Changing Liability Considerations Arising from the use of Telehealth**
Darra Coleman | Special Counsel | Nexsen Pruet
Alice Harris | Member | Nexsen Pruet
This presentation will address the expanded use of telehealth and some of the liability issues that may come with this expanded use of telehealth which would include reimbursement and other liability.

2:45 – 3:30pm **Managing the Trend Toward Transparency**
Matthew Roberts | Member, Board of Directors | Nexsen Pruet
This presentation will address the recent adoption of new federal legislation and executive rules requiring hospitals and other providers to provide more transparency with respect to their pricing. The presentation will also address the

changes in benefit designs and health care consumerism that has developed over the last several years.

3:30 – 4:00pm **Exploring Cost Saving Strategies for Employers and their Employees in the Healthcare Benefits Space**
Tony Lodovico | Senior Vice President, Business to Business | MASA Medical Transport Solutions
Focus will consist of illustrating current trends around cost of healthcare for employers and employees. Presentation will also include high level description of MASA as a value differentiator for CFOs and the companies they serve.

4:00pm **Adjourn**

6:00pm **Dinner**

Thursday, August 19

8:30 – 9:00am **Welcome & Breakfast**
Christian Soura | Executive Vice President | SCHA

9:00 – 9:45am **The Benefits of Group Self-Insurance Captives in a Hardening Market**
Adam Allen, MBA, FACHE | President & CEO | Antum Risk
A comparison of the different insurance options will be discussed along with an update on the current insurance market in South Carolina. Case studies will be presented that illustrate how group self-insurance captives can result in long term stability and savings. An example of a unique retrospective funding model born out of the suggestion of a SC hospital will be highlighted.

9:45 – 10:30am **Learning from the Maryland Model**
Dawn Carter | Senior Partner | Ascendient Healthcare Advisors
The State of Maryland has been experimenting with healthcare payment models for decades. Since 1977, Maryland's Health Services Cost Review Commission ("HSCRC") has been prospectively setting hospital payment rates for all payers, with considerable success. In 2014, Maryland introduced a new payment model, the "All-Payer Model" to expand payment control to cover all hospital-based services. In 2019, Maryland modified its model once again, adopting the "Total Cost of Care Model" in attempt to manage costs across the full continuum.

While Maryland's experience could comprise a graduate course for an entire semester, the purpose of this presentation is to understand the Maryland models, what has worked, and what lessons health systems in other states can learn to better prepare for widespread payment reform. This presentation will include specific strategies deployed by hospitals under the model, as well as critical success factors and ongoing challenges under a fixed revenue payment system.

10:30 – 10:45am **Networking Break**

10:45 – 11:30am **The Future of Rural Healthcare or Saving Rural Healthcare**
Brian Ackerman | Partner | Ascendient Healthcare Advisors
This presentation will include industry trends impacting rural healthcare (e.g., provider and workforce shortages, hospital-physician integration, payor shifts/strategies, hospital-at-home), as well as three different examples of rural healthcare transformation and the tools that delivered a different solution for each community.

11:30 – 12:15pm	**Healthcare Contingent Labor and Financial Stewardship in 2020** April Hansen, MSN, RN | Group President, Workforce Solutions | Aya Healthcare and Qualivis *The pandemic introduced new challenges to an already-strained healthcare workforce. Contingent workers were called upon in mass volume to subsidize core staff across the nation. As the war for talent by hospital systems ensued, cost inflation followed. Join us for this dynamic session to understand the status of the healthcare workforce pre-pandemic, the factors influencing costs during the past year, and the new trends in the post-pandemic workforce. Attendees will learn strategies to more effectively navigate the contingent labor workforce to control costs, improve quality, and retain core talent.*
12:15 – 12:30pm	**Break & Lunch**
12:30 – 1:00pm	**State Issues Update with SC DHHS**
1:00pm	**Closing Comments and Adjournment of Sponsors & Guests** Christian Soura | Executive Vice President | SCHA
1:00 – 2:00pm	**CFO Executive Session** Lisa Goodlett | Chairman | SCHA Finance Council
2:00pm	**Adjourn**

Speaker Bios

Liz Sweeney
Liz Sweeney is the founder of Nutshell Associates, a boutique public finance consulting and municipal advisory company. Nutshell is registered as a municipal advisor with the SEC and MSRB and is certified as a Women's Business Enterprise (WBE) and Woman Owned Small Business (WOSB). Liz is a member of the Board of Directors of the University of Maryland Medical System, which delivers world class care while serving many of Maryland's neediest patients through its 13 hospitals, 2 million annual patient visits, 28,000 employees, and greater than 150 locations. Her committee activities include finance, corporate & social responsibility, and board education.

Previously, Liz was a managing director at S&P Global Ratings, the world's largest credit rating agency, where she conducted objective, in-depth credit evaluations with a focus on the non-profit healthcare sector. As an analyst, Liz was known for providing insightful opinions about the strategic, financial, and operational risks of nonprofit hospitals and healthcare systems. She also served in a senior credit policy and risk management role as S&P's criteria officer for US Public Finance, responsible for a portfolio of credit rating methodologies utilized to assign ratings to over 22,000 public finance obligors.

Liz publishes research and opinions frequently to share with the market. She recently wrote about the performance of Maryland's unique hospital payment system during COVID, the imperative for healthcare boards to maintain a sharp focus on board education, and the role of healthcare boards in overseeing Environmental, Social and Governance (ESG) issues. You can read Liz's thought leadership at www.nutshellassociates.com.

She holds an MBA from NYU's Stern School of Business, a BS from Georgetown University, and a Certificate in Healthcare Management from NYU's School of Professional Studies.

Alice Harris
Alice Harris is an experienced health care, reimbursement, and compliance attorney based in the firm's Columbia, South Carolina office, where she assists hospitals, health care systems, physician practices, skilled nursing facilities, hospice agencies, home health care agencies, and other health care providers with a wide variety of matters. Her practice focuses on health care regulatory compliance, payor audit appeals and defense, reimbursement, billing and coding, COVID-19 advice, compliance program guidance, response to federal and state contractor audits, internal investigations, fraud and abuse analysis and litigation matters, federal and state survey and certification matters, Medicaid Cost Report appeals, EMTALA investigations, transactional compliance due diligence, and other health care regulatory and litigation matters.

Alice has experience handling overpayment and extrapolated overpayment appeals related to Medicare, Medicaid, and Commercial payor audits, including UPIC, ZPIC, MIC, and other contractor audits. She also assists providers with proactive compliance assistance to reduce exposure to audits, as well as root cause examinations and the development of corrective action plans to address underlying issues related to ongoing payor audits.

Her compliance analysis and advice experience ranges from initial formation and restructuring of compliance programs, including policy and procedure development, to internal investigations, potential whistleblower exposure, and coordination of ongoing coding reviews.

Darra Coleman
Darra James Coleman is Special Counsel in Nexsen Pruet's Columbia, South Carolina office, where she practices Health Care law.

Darra has more than 20 years of diverse experience serving both public and private sector clients. From May of 2012 until March of 2020, she served as Chief Advice Counsel and policy counsel for the South Carolina Department of Labor, Licensing and Regulation, where she managed the legal team that provides in-house legal services to 42 professional and occupational licensing boards.

Most recently, Darra has been able to leverage her experience in policy counsel to help clients navigate the COVID-19 crisis. She offers guidance in the areas of telehealth, regulatory compliance and licensure to assist clients in facing the myriad of changes that are occurring in state and federal policies and regulations to address the rapidly changing health care landscape.

Following a judicial clerkship immediately upon graduation from law school, Darra spent five years practicing with a small litigation firm where she represented governmental entities, individuals and insurance carriers in civil litigation and mediation throughout South Carolina. She spent the next eight years with a mid-size law firm where her practice grew to encompass cases from around the country and diverse business interests, including health care and other professional licensure defense. As a mediator and litigator, Darra helped clients resolve disputes involving employment, probate, personal injury, family, insurance coverage, contract and construction law.

Darra recognizes her clients' needs are as varied and fast-paced as the evolving world in which we live.

Matthew Roberts
Representing health care providers has been a critical mission at Nexsen Pruet for six decades. Matthew Robert's dedication to continuing that tradition is why firm leadership selected him to Chair the firm's Health Care Practice Group.

Matthew's Practice
Matthew has assisted providers in virtually every aspect of the health care business. Typically, his engagements are focused on:

- Healthcare affiliations and joint ventures Physician/hospital relationships Managed care issues
- Stark/Anti-Kickback laws
- General compliance matters
- Health care contracts

- Board governance

Matthew has set up single service agreements, developed integrated physician networks and established other collaborative arrangements between health care providers. Matthew collaborates with clients to create and implement strategic plan and has extensive experience advising clients on affiliations, joint ventures, and purchase and sales. He also advises physician relationships, health care provider Boards on matters including executive compensation, conflict of interest policies and Board involvement in compliance and quality related issues.

Matthew also works with health care clients on ways to minimize their exposure compliance risk caused by the myriad of regulatory requirements found in the health care industry and to create a "culture of compliance" implemented on a system-wide basis. Matthew routinely works with providers to assist them in resolving payment and billing disputes with various types of payors. Matthew is also very involved with clients operating in the Life Sciences industry, advising them on issues related to governance, compliance, corporate and transaction matters.

Tony Lodovico
25 year successful leader across various healthcare segments. Business leader who partners with organizations to develop meaningful strategies that create value for clients. Industries served include – Healthcare: Pharmaceutical, hospitals, physicians, pharmacies, Managed Care Organizations, Insurance and Memberships: Emergency Medical Transportation, Employee benefits brokers, Associations and Affinity groups. Customers in the insurance and memberships space include the following verticals: Hospitals, School Districts, Municipalities, Firefighters Associations, Financial Institutions.

Adam Allen
Adam is responsible for overall management of Antum Risk's operations and for ensuring that Antum Risk's mission is carried out. He also serves as president of Palmetto Hospital Trust, Palmetto Healthcare Liability Insurance Program, and Preferred Healthcare Liability Insurance Program SPC, a Cayman Islands-domiciled Class B insurance company.

Prior to joining Antum Risk in 2000, Adam worked in new product development for a catalog retailer whose target market was healthcare and dentistry. He also worked in technology development and project management with a large computer service corporation.

M.B.A., University of Edinburgh, Edinburgh, Scotland
B.A. in Marketing, University of South Carolina, Columbia, SC
AINS – Associate in General Insurance
ARM – Associate in Risk Management
AIS – Associate in Insurance Services
FACHE – Fellow of the American College of Healthcare Executives

Dawn Carter
A hospital and healthcare consultant with more than 25 years of experience, Dawn Carter is a forward-thinking leader and advocate of transformational healthcare delivery. Since first founding her practice in 1994, Dawn has specialized in helping her clients envision a future outside the traditional hospital "box" to include new delivery channels, innovative organizational models, and emerging opportunities for collaboration.

Dawn's expertise includes strategic planning, merger/acquisitions, business planning, and financial feasibility. She leverages this depth and breadth of experience along with the latest data and statistical modeling tools to provide clients with the insights and guidance they need to make sound decisions in a highly complex, highly regulated, and rapidly evolving healthcare landscape.

Dawn has served as a trusted consultant to a wide range of healthcare clients, including regional health systems, academic medical centers, community hospitals, home health agencies, hospice agencies, provider associations and physician groups. She is a frequent speaker at hospital and healthcare association events, including the North Carolina Healthcare Association (formerly North Carolina

Hospital Association), The Duke Endowment, and the Society for Healthcare Strategy and Market Development.

Dawn earned her Master's in Healthcare Administration from the University of North Carolina at Chapel Hill, Gillings School of Global Public Health and has served as an adjunct assistant professor of healthcare strategic planning at her alma mater since 1999.

Brian Ackerman
Based in our Washington, D.C. office, Brian directs Ascendient engagements related to hospital and health system strategy, public health planning, physician development and planning, and financial feasibility studies. Brian leverages his unique analytical skills, financial knowledge and consulting experience to help clients think strategically while ensuring they adhere to ever increasing regulatory pressures. Brian also assists clients with service line business plans, market demand studies, community health needs assessments, merger/acquisition analysis, and CON preparation. Brian has presented at industry conferences and authored articles for healthcare publications of leading associations, including the Healthcare Financial Management Association (HFMA). He received his Master's in Healthcare Administration from the University of North Carolina at Chapel Hill, Gillings School of Global Public Health.

April Hansen, MSN, RN
As Aya Healthcare's Group President of Workforce Solutions, April Hansen, MSN, RN is responsible for strategic business development, workforce solutions program operations and clinical services support. A strong proponent of lifelong learning, April created the Aya Scholars Program, the industry's first clinical ladder and professional recognition model for travel nurses, to ensure their continued career growth.

April also oversees the clinical and quality outcomes of more than 19,000 workers on assignment across the United States. She currently serves on the Board of Directors for the Wisconsin Organization of Nurse Leaders, serves on the Membership Committee with WONL and in the past served as an elected member of the Wisconsin Nurses Association Public Policy Committee.

April was awarded the 2019 Wisconsin Nurse Leader of the Year, was named to Becker's List of Rising Healthcare Stars in 2018, Staffing Industry Analyst's "40 Under 40" list in 2019 and Staffing Industry Analyst's Global Power 150 - Women in Staffing in 2020. April was published in the June, 2019, edition of Nursing Administration Quarterly on disruption in healthcare and the role of nursing leadership. April has served as an expert for national media outlets including CBS This Morning, CNBC, Associated Press, Marketplace and Forbes.

Additional Details

For questions, please contact Kristin Hill at khill@scha.org, Manager of Business Development for Solvent Networks and/or Tammy Pope at tpope@scha.org, Advocacy and Government Relations Specialist for SCHA.

Continuing education units have been approved toward CPE for this activity by SCHA. Continuing Education Certificates for proof of attendance will be issued to all registrants attending this event upon completion of the online program evaluation.