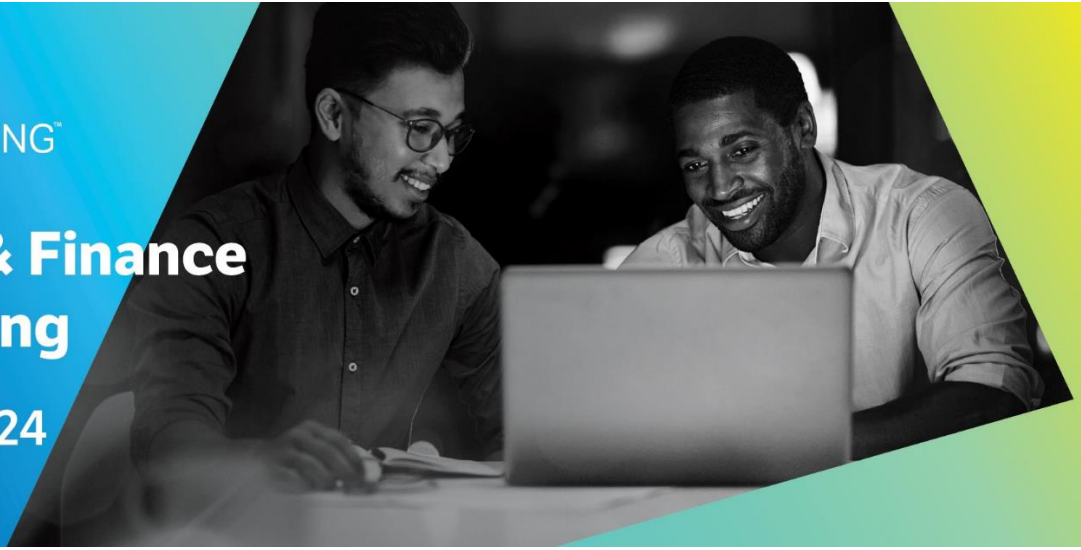


Operations & Finance Virtual Meeting

February 6-7, 2024



AMGA Consulting's Operations & Finance Virtual Conference will delve into the most pressing and forward-thinking topics in the healthcare industry in 2024, including the current state of medical groups, the latest operations and financial benchmarks, and leveraging data for financial improvement.

Take a deep dive into the crucial discussion of building a high-performance culture in medical groups. This conference is your gateway to shaping the future of healthcare, making informed decisions, and driving excellence in medical group management.

Note: This virtual event is created for a medical group audience only. It is closed to AMGA Corporate Partners, other industry organizations, and consulting firms.

For more information, please contact **Dustin Gunderson, MBA**, Director of Business Development at dgunderson@amga.org.

Program Objectives:

1. Discuss nuanced insights into emerging market trends and competitive dynamics influencing group practice operations.
2. Share valuable insights into market leading practices for forecasting utilization and revenue.
3. Explore the strategic utilization of market data to enhance the financial performance of a healthcare organization.
4. Delve into strategic approaches to uncover opportunities in the areas of patient access, provider productivity, physician compensation, clinic staffing, and other operational efficiencies.
5. Empower participants with the knowledge needed to navigate the intricacies of benchmarking, safeguarding the financial stability and success of their organizations.
6. Explain how to navigate workforce challenges with precision and effectiveness.
7. Equip healthcare professionals with practical insights to optimize access and enhance overall healthcare delivery in a complex system.
8. Explore ten key strategies for optimizing healthcare leadership and performance.

Credit hours: 7.75 CME; 9.4 CPE; 7.75 ACHE Qualified Education

Tuesday, February 6

12:00pm – 12:05pm	<p>Welcome and Meeting Overview <i>Fred Horton, MHA, President, AMGA Consulting</i></p>
12:05pm – 1:00pm	<p>The State of Medical Groups in 2024 <i>Fred Horton, MHA, President, AMGA Consulting and Mike Coppola, MBA, Vice President, Chief Operating Officer, AMGA Consulting</i></p> <p>AMGA Consulting’s President will kick off our meeting with a journey through the evolving landscape of medical groups in 2024. This presentation delves into the disruptive forces reshaping healthcare, with a keen focus on the financial pressures impacting medical groups. We’ll discuss nuanced insights into emerging market trends and competitive dynamics influencing group practice operations. This presentation will frame our meeting, empowering you to navigate the complexities of financial challenges with a tailored examination of innovative solutions and strategic recommendations designed to optimize resilience, drive sustainable growth, and position your group for success in the coming year.</p> <p><u>Reflection question for participants:</u> What are the disruptive forces reshaping healthcare, specifically – the financial pressures impacting medical groups?</p>
1:00pm – 2:00pm	<p>Balancing Volume and Value: Primary Care Compensation Redesign in a Dynamic Market <i>David Valenzuela, MD, AZ Region Primary Care Physician Executive, Banner Health</i></p> <p>A decade after the Affordable Care Act and three years removed from the revamped E/M coding structure, the Banner Medical Group felt it needed to better align its primary care compensations models with the current marketplace in order to attract and retain the top talent necessary to thrive in a dynamic and highly competitive region. This session will outline how Banner Medical Group altered the structure of their compensation plan to meet these objectives. During this session attendees will hear how Banner Medical Group contemporized their compensation plan while balancing the shift from volume to value. Our speakers will dive into the goals behind the changes, environmental pressures for change, how the change was structured, and what to do going forward when it comes to the evolution of primary care compensation.</p> <p><u>Reflection question for participants:</u> How might your organization’s strategic shift from volume to value impact the quality of primary care services?</p>
2:00pm – 2:05pm	Break
2:05pm – 3:05pm	<p>Leveraging Data to Drive Financial Improvement <i>Katie Dobler, Vice President, Salem Health Medical Group; Bart Caldwell, MBA, Projects Director, Salem Health Medical Group; Joshua Franke, MBA, Chief Projects Officer, Salem Health Hospitals & Clinics; and Will Holets, MBA, MHA, Senior Director, AMGA Consulting</i></p> <p>In this session, presenters will delve into the strategic utilization of market data to enhance the financial performance of their organization.</p> <p><u>Reflection question for participants:</u> How can my organization navigate the staffing challenges within our healthcare industry?</p>

3:05pm – 4:05pm	<p>Building a High-Performance Culture in Medical Groups <i>Howard B. Graman, MD, Vice President, AMGA Consulting</i></p> <p>From communicating a compelling vision and recruiting top-tier talent to implementing accountable practices, addressing work/life balance, and promoting clinical excellence, this session provides a comprehensive guide to fostering a thriving medical group within the broader healthcare system.</p> <p><u>Reflection question for participants:</u> What are ten key strategies for optimizing healthcare leadership and performance?</p>
4:05pm – 4:30pm	<p>Day 1 Wrap-Up & Preview of Day 2 <i>Fred Horton, MHA, President, AMGA Consulting</i></p>

Wednesday, February 7

12:00pm – 12:05pm	<p>Opening Comments <i>Fred Horton, MHA, President, AMGA Consulting</i></p>
12:05pm – 1:00pm	<p>Top 5 Pitfalls to Avoid When Applying Survey Data <i>Kelsi O'Brien, MHSA, Senior Director; and Will Holets, MBA, MHA, Senior Director, AMGA Consulting</i></p> <p>In this presentation, we will carefully dissect the potential pitfalls associated with the improper utilization of benchmark data, emphasizing the critical impact it can have on your organization's financial health. By identifying and addressing common misconceptions, attendees will gain a nuanced understanding of how to leverage benchmark data effectively, mitigating risks and ensuring that strategic decisions are informed by accurate and contextually relevant information. The session aims to empower participants with the knowledge needed to navigate the intricacies of benchmarking, safeguarding the financial stability and success of their organizations.</p> <p><u>Reflection question for participants:</u> How can I leverage benchmark data effectively, mitigating risks and ensuring that strategic decisions are informed by accurate and contextually relevant information?</p>
1:00pm – 1:40pm	<p>Provider Work Expectations – Managing the New Normal <i>Keith Miyamoto, MD, President PIG Health Physicians Medical Group and Jerry Floro, MD, FACC, FACP, Division of Cardiology, PIH Medical Group PIH Health Physicians</i></p> <p>In this session, our presenters tackle the imperative task of re-establishing work expectations for providers in the ever-evolving medical group landscape. During this session attendees will hear examples of strategic approaches for managing providers at varying production levels, offering specifics of how the medical group adopted to new and clear definitions, implemented concrete protocols, and communicated new expectations to its provider workforce. Gain a comprehensive understanding of how to navigate workforce challenges with precision and effectiveness in this informative and practical session.</p> <p><u>Reflection question for participants:</u> How can I re-establish work expectations for providers in the ever-evolving landscape of my organization?</p>

1:40pm – 1:50pm	Break
1:50pm – 2:50pm	<p>Access Strategies in a Complex Healthcare System <i>Douglas Ditri, Former COO System Ambulatory Operations, Henry Ford Health</i></p> <p>In this insightful presentation, we will explore nuanced and effective access strategies tailored for the complexities of today's healthcare systems. Exploring topics such as, appointment scheduling innovations, leveraging technology advancements to meet consumer demand and maximizing patient flow attendees will gain a comprehensive understanding of how to navigate the intricacies of a multifaceted healthcare environment. Whether addressing the challenges of diverse patient populations, streamlining referral processes, or enhancing virtual health accessibility, this session aims to equip healthcare professionals with practical insights to optimize access and enhance overall healthcare delivery in a complex system.</p> <p><u>Reflection question for participants:</u> How can my organization optimize access and enhance overall healthcare delivery in our complex system?</p>
2:50pm – 3:50pm	<p>Clinic Staffing in Today's Nuanced Environment <i>Ann Tesmer SVP, Froedtert & the Medical College of Wisconsin Clinical Operations at Froedtert Health</i></p> <p>In this session, Froedtert Health will discuss the application of market-based staffing principles to drive operational standardization and financial improvement, in a competitive marketplace. The audience will come away with an understanding of how to apply market data in an ambulatory and academic settings to standardize care teams. The session aims to equip attendees with the skills necessary to navigate the nuanced world of clinic staffing.</p> <p><u>Reflection question for participants:</u> How does your health system/medical group adjust clinic staffing for highly productive providers?"</p>
4:05pm – 4:30pm	<p>Closing Comments & Adjournment <i>Fred Horton, MHA, President, AMGA Consulting</i></p>

CONTINUING EDUCATION:

Physicians, Nurse Practitioners, Registered Nurses, and Physician Assistants (CME Credit): AMGA is accredited by the Accreditation Council for Continuing Medical Education (ACCME) to provide continuing medical education for physicians. AMGA designates this live educational activity for up to **7.75** AMA PRA Category 1 Credits™. Physicians should claim only the credit commensurate with the extent of their participation in the activity. For the purpose of recertification, the American Nurses Credentialing Center (ANCC) and the National Commission on Certification of Physician Assistants (NCCPA) accept AMA PRA Category 1 Credit™ issued by organizations accredited by the ACCME. With respect to individual states' requirements for continuing education, State Boards have final authority of the acceptance. **Disclosures:** As an accredited provider of Continuing Medical Education (CME) activities, it is the policy of AMGA to ensure balance, independence, objectivity, and scientific rigor in all its educational activities. All planners, faculty, and other individuals in control of content, participating in any learning activity sponsored by AMGA, are required to disclose all financial relationships with ineligible companies – whose primary business is producing, marketing, selling, re-selling, or distributing healthcare products used by or on patients – over the previous 24 months. **None of the planners for any of the accredited activities have relevant financial relationships to disclose.**

CPAs (CPE Credit): AMGA is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of Continuing Professional Education (CPE) on the National Registry of CPE Sponsors. AMGA

designates this live educational activity for up to **9.4** CPE credits in the field of “specialized knowledge.” In accordance with the standards of the National Registry of CPE Sponsors, CPE credits are granted based on a 50-minute hour. No prerequisite requirements are necessary for this event. Please note: State boards of accountancy have final authority on the acceptance of individual courses for CPE credit.

American College of Healthcare Executives (ACHE) Qualified Credit: By attending this AMGA program, participants may earn up to **7.75** American College of Healthcare Executives (ACHE) Qualified Education hours toward initial certification or recertification of the Fellow of the American College of Healthcare Executives (FACHE) designation. Participants of this program who wish to have their attendance considered for ACHE Qualified Education hours should list it when they apply to the ACHE for advancement or recertification. Please note: Participants are responsible for maintaining a record of their ACHE Qualified Education hours.