

**Simione Healthcare Consultants**  
**Leadership Summit 2020**  
**SEPTEMBER 29-OCTOBER 1 | 1-5 PM EDT | \$199/PERSON**  
**AGENDA AT-A-GLANCE**

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**Day 1, September 29, 1-5 PM EDT**

**Advancing Leadership in Home and Community-Based Care**

**1:00 pm-2:40 pm**

**Opening Remarks: William J. Simione III, Managing Principal**

**Session 1: From the Eyes of a Consultant: Making Sense of 2020 & Creating a Solid Future in an Industry Primed for Growth**

**Panelists**

William J. Simione, III, Managing Principal (Moderator)  
David Berman, CPA, CGMA, CVA, Principal, Mergers & Acquisitions  
J'non Griffin, President, Home Health Solutions  
Christine Lang, MBA, Director, Data Consulting  
Melynda Lee, MBA, Director, Growth Solutions

Julia Maroney, RN, MHSA, Managing Director  
Eric Scharber, Principal, Talent Solutions (Exact Recruiting)  
Rob Simione, CPA, Director, Financial Consulting  
Kim Skehan, RN, MSN, Director, Compliance, Quality & Regulatory

**Session Description**

Hear from the leading consultants in home health and hospice about perspectives on business so far in 2020, and what they expect to see in the year to come. Experts in clinical operations, finance, compliance, regulatory, M&A, information technology, and talent management will paint a picture of the current landscape based on their engagement with hundreds of providers across the US. The goal of this session is to give leaders a multi-disciplinary perspective of the challenges among providers, successful responses to those challenges, and opportunities to move forward with positive momentum.

**2:40 pm-2:50 pm Break**

**2:50 pm-3:50 pm Session 2 - Leadership Lessons: If Hindsight is 2020, Then Why Aren't All the Answers Right in Front of Us?**

**Panelists**

Eric Scharber, Principal, Talent Solutions (Moderator)  
Sara Castillo, Chief Clinical Officer, AccentCare Home Health Inc.

Carla Davis, Chief Executive Officer, Heart of Hospice  
Brent Korte, Chief Home Care Officer, EvergreenHealth

**Session Description**

As a result of a sudden halt in the world's movement, industry leaders have responded to the pandemic and social unrest with timely, difficult decisions. Learn from key C-suite leaders about how they prioritized and kept their focus, how they developed other leaders in their ranks, and why that matters. Panelists will address leadership self-assessment and how to continue to grow in changing times. The conversation will address communication, culture, and leadership development in this particularly unique year – and most important, we will tie it back to organizational performance.

**3:50 pm-4:00 pm Break**

**4:00 pm-4:45 pm Session 3: Tough Times Show Our True Colors: Exploring & Leveraging Top Talent**

**Panelists**

Eric Scharber, Principal, Talent Solutions  
Melynda Lee, MBA, Director, Growth Solutions  
Rob Krause, Division Vice President of Sales, West-Gateway Division, LHC Group

## Session Description

Leadership development requires understanding the unique values and traits of each team member to ensure that their strengths can affect change and support organizational performance. By understanding yourself and others based on your personality type, leaders can develop more effective communication and enhance collaboration among staff at all levels. Speakers will introduce the concepts presented in the True Colors® research-based approach to showcase opportunities to evaluate roles, keep employees engaged and cultivate high-performing talent. Hear from one of the industry's largest providers on how the organization leveraged this methodology to optimize performance and growth among its leaders.

**4:45 pm-5:00 pm**

**Q&A with Today's Panelists**

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**Day 2, September 30, 1-5 PM EDT**

## The Art & Science of Execution: Process, Practice, Technology

The process to achieve organizational goals is a journey: it takes thoughtful analysis and deliberate action with progress rarely following a straight or consistently forward path. Today, experts from many disciplines will take you on an excursion – setting goals, identifying metrics to analyze performance, developing a plan, and course-correcting when the unexpected occurs. Our consultants will navigate the discussion from the viewpoint of leaders across home health and hospice—sales, quality, clinical operations, finance, and IT. Participants will walk away with a greater understanding to compare their organizations with benchmarks and what to do with operational teams based on the available data and other information.

## Panelists

Christina Andrews, Senior Manager, Growth Solutions

Aldin Fauni, MSHI, BSN, RN, RHIA, CHISP, Manager, Information Technology

Cynthia Gibbons, MBA, CHCE, Senior Manager, Financial Consulting

Mike Simone, MBA, Senior Manager, Financial Consulting

Laura Wilson, RN, BSN, COS-C, Director, Clinical Consulting

**1:00 pm-2:20 pm Session 1: Strategic Planning Case Study - Month 1**

## Session Description

This session will illustrate the concepts of executing a strategic plan with goals for each operational area – Sales and Marketing, Clinical Operations, Quality, Finance, and Information Systems. Learn how to:

- Identify key drivers of performance
- Use data to conduct a root cause analysis

**2:20 pm-2:30 pm Break**

**2:30 pm-3:50 pm Session 2: Strategic Planning Case Study - Month 6**

## Session Description

Explore the interconnected nature of data through the various operational departments of a high-performing organization. Learn how to:

- Develop and implement an improvement plan

**3:50 pm-4:00 pm - Break**

**4:00 pm-4:45 pm Session 3: Strategic Planning Case Study - Month 12**

## Session Description

Develop confidence and action steps to adapt strategic plans when goals are not met, or the year takes an unexpected turn.

**4:45 pm-5:00 pm**

**Q&A with Today's Panelists**

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**Day 3, October 1, 1-5 PM EDT**

**Successful Partnerships**

**1:00 pm-2:15 pm Session 1: Creating Value & Finding a Best-Fit Strategic Partner**

**Panelists**

David Berman, CPA, CGMA, CVA, Principal, Mergers & Acquisitions

Theresa Santoro, President & CEO, RVNAHealth

Melynda Lee, MBA, Director, Growth Solutions

Leslie Levinson, JD, Partner, Robinson+Cole

**Session Description**

Considering a merger or acquisition to grow your business? This session will cover options for strategic integration with clinical and financial insights to identify what constitutes value, and how to create more value in your organization while evaluating trends and opportunities across the many settings in home and community-based care. A case study will provide awareness of the approaches and goals for a multi-agency merger designed to strengthen a regional market experiencing a high level of integration across the continuum.

**2:15 pm-2:30 pm Break**

**2:30 pm-3:45 pm Session 2: How to Grow the Value of Your Organization**

**Panelists**

David Berman, CPA, CGMA, CVA, Principal, Mergers & Acquisitions

Mark A. Kulik, M&AMI, CM&AP, Managing Director, The Braff Group

**Session Description**

Value means many different things in the world of business. In home health and hospice, value comes from a healthy blend of clinical, financial, and administrative results that add up to efficient operations and profitable returns. This session will provide an understanding of the current M&A environment, identifying the key components to grow value, the necessary data to court potential buyers, and a valuation example to illustrate potential risk and expected growth based on a deep dive into operations.

**3:45 pm-4:00 pm Break**

**4:00 pm-4:45 pm Session 3: Promoting a Spirit of Optimism through a Shared Vision for Home Health & Hospice**

**Speakers**

William J. Simone III, Managing Principal

Andrew Molosky, MBA, FACHE, CHPCA, President & Chief Executive Officer, Chapters Health System

**Session Description**

Leadership has been put to the test this year, requiring a higher level of communication and collaboration to ensure safety for employees and patients, and to stabilize clinical and financial operations amid key regulatory changes and pandemic response. The bright side of this response has been the dedication and resiliency of home health and hospice teams across the country, who need positive reinforcement and the right resources to move forward with confidence and a sense that they are valued. In our final session of the summit, discussion will focus on leadership approaches that build enthusiasm and develop an optimistic approach for organizational recovery and growth. Join the discussion for a dose of optimism – because our industry is in a desirable position to improve healthcare, meeting demand for services amid new priorities. The future course of home health and hospice is full of possibilities!

**4:45 pm-5:00pm**

**Q&A with Today's Panelists**