Physician and Hospital Leadership Seminars

OCTOBER 6–9, 2016
LA CANTERA HILL COUNTRY RESORT
SAN ANTONIO, TX

Bring your CEO for FREE!
Call 800-807-9819 or email greeleyseminars@greeley.com for details.

▷ Medical Executive Committee Institute
▷ Training Physicians to Lead Clinical Transformation
▷ The Credentialing Solution
▷ Peer Review Boot Camp
▷ Advanced Physician Leadership Retreat
You and your team are invited to join us in San Antonio for a unique seminar experience

Dear Colleagues,

As my Greeley colleagues and I continue our work with hospital administrators and physician leaders nationwide in this unprecedented time of change in healthcare, it becomes clearer that physicians will be the catalysts for positive, lasting change. In other words, it’s about the physicians! Regardless of the issues faced—responding to the Affordable Care Act, coordinating care, enhancing cost effectiveness—we will not achieve the reform we seek at the individual hospital, system, or nationwide level without physicians getting other physicians to change how they practice medicine.

Please join us in beautiful San Antonio this coming fall to capitalize on an unparalleled opportunity for your teams of executives, physician leaders, and others who play key roles in your medical staff and quality programs to learn and participate in our seminars together and to walk away with shared goals and strategies for your organization. We purposely build free time into the seminar days to allow you the opportunity to augment your seminar sessions with rewarding team-building events, networking, or customized sessions with our faculty.

Our courses promise to offer exciting exchanges of ideas, strategies, and practical advice for conquering today’s most pressing challenges. All seminars provide a highly effective means to expand the education, team-building, and skills your leaders need to achieve the goals that are most critical to your hospital’s success.

I look forward to seeing you in San Antonio!

Sincerely,

Rick A. Sheff, MD
Principal and Chief Medical Officer
The Greeley Company

p.s. As you might know, we have provided leadership seminars for over 20 years and offer them multiple times each year. We update the content and format continually—and add entirely new programs as needed—so even if you’ve attended before, there’s good reason to join us again!
Physician and Hospital Leadership Seminars  
October 6–9, La Cantera Hill Country Resort, San Antonio, TX

**MEDICAL EXECUTIVE COMMITTEE INSTITUTE: THE ESSENTIAL TRAINING FOR ALL PHYSICIAN LEADERS**

Thousands of physicians have completed this course, preparing them to assume such leadership positions as department chair, medical director, credentials or quality committee member, medical staff officer, and MEC member. Because new leadership challenges abound, many hospitals make it standard practice to enroll current and future leaders in this program annually; in fact, one client recommended: “Hospitals should make this seminar mandatory for any and all MEC members.” *(See p. 7 for more information.)*

**TRAINING PHYSICIANS TO LEAD CLINICAL TRANSFORMATION: ACHIEVE BREAKTHROUGH IMPROVEMENTS IN QUALITY WHILE REDUCING COSTS**

All of today’s solutions to improve quality and reduce costs make only incremental changes. They don’t tackle the fundamentals that must change to make healthcare sustainable. That will require CLINICAL TRANSFORMATION, which cannot be achieved without trained, effective physician leaders. *Training Physicians to Lead Clinical Transformation* goes beyond buzzwords to teach participants the critical skills necessary to achieve physician engagement and breakthrough improvements in quality while reducing costs. *(See p. 11 for more information.)*

**PEER REVIEW BOOT CAMP: PERFORMANCE IMPROVEMENT-DRIVEN PEER REVIEW**

The medical staff often views peer review as punitive, when it can actually be a positive force for physician improvement. *Peer Review Boot Camp* offers practical, in-depth training for physicians recently appointed to peer review positions, existing peer review leaders who seek new ideas on how to improve their case review and OPPE/FPPE methods, and staff who support peer review. Taught by experienced physician leaders from the practitioner’s perspective, Peer Review Boot Camp’s format features a varied curriculum of group exercises, clinical case reviews, and case studies, with time for small group discussions and segments on ambulatory and ACO settings. *(See p. 16 for more information.)*

**THE CREDENTIALING SOLUTION: BEST PRACTICES FOR SOLVING TODAY’S CREDENTIALING AND PRIVILEGING CHALLENGES**

Presented and facilitated by nationally renown credentialing experts, this course will provide credentials committee chairs and members, physician leaders, and medical services professionals with the skills and knowledge necessary to design a credentialing and privileging program that protects patients, is fair to physicians and clinicians, incorporates integrated solutions, and complies with accreditation and regulatory requirements. *(See p. 20 for more information.)*

**Retreat Program – October 8–9**

**ADVANCED PHYSICIAN LEADERSHIP RETREAT: NEW ROLES. NEW CHALLENGES. NEW SKILLS.**

Physician leaders today need new skills and knowledge to be effective. From serving as medical staff officers, department chairs, and medical directors to leading service lines, physician-management dyads, ACOs and more, physicians must both lead and collaborate with others in tackling critical operational and business challenges. The *Advanced Physician Leadership Retreat* trains participants in many fundamental tools for being an effective leader in the new organizational models of today. This hands-on retreat employs case-based learning, discussion, and skill-building to prepare participants to take on the toughest and most complex real-world challenges they’ll face. *(See p. 24 for more information.)*
About Your Location
LA CANTERA HILL COUNTRY RESORT, SAN ANTONIO, TX

Situated atop one of the highest points in all of San Antonio, you’ll find La Cantera Hill Country Resort. It’s a place where peace and tranquility flourish. Where emerald fairways and sparkling pools are the only things interrupting the scenic vistas overlooking the Texas Hill Country. A place where you’ll find a new sense of relaxation, whether you’re staying for business or for a well-deserved vacation.

La Cantera Hill Country Resort, San Antonio, TX
16641 La Cantera Parkway
San Antonio, TX 78256

Reservations: (855) 499-2960
Discounted room rate: $229 per night
Hotel telephone: (210) 558-6500
Hotel cutoff date: September 14, 2016

For the discounted room rate, reservations must be made by the hotel cutoff date. Be sure to mention Greeley to receive the discounted room rate. Rooms are available on a first-come, first-served basis.

ACTIVITIES & AMENITIES

The Greeley Company purposely structures our seminar programs to allow time for participants to enjoy activities and events outside the educational sessions—for team-building purposes or simply to reinvigorate, relax, and reflect. We are highly selective in choosing each premier location to best suit the season and ensure an abundance of opportunities that are sure to please our diverse audience.

La Cantera Hill Country Resort offers authentic experiences for guests, whether it’s relaxing in an exclusive pool cabana or discovering the hidden wonders of the Texas Hill Country. Find your place in this hill country oasis.
MEDICAL EXECUTIVE COMMITTEE INSTITUTE
The Essential Training for All Physician Leaders

Obtain the medical staff leadership skills not taught in medical training.
The Medical Executive Committee Institute is an ideal way for developing physician leaders to prepare for their important positions and for current leaders to remain apprised of new issues and leadership techniques. This content applies to both physician leaders in traditional organized medical staffs and those in the new/developing medical staff models. Presented by nationally recognized, motivational, and effective physician leadership educators, this program leaves participants with renewed energy and commitment for their essential roles.

BENEFITS
- Recognize why physician leadership is critical for success
- Better navigate the challenges of having employed and private practice physicians on the same medical staff
- Understand new models that help to improve quality and reduce costs
- Manage physician behavior using performance expectations, feedback, and effective interventions

LEARNING OBJECTIVES
Upon completion of this program, participants will be able to:
- Describe the impact of healthcare reform and other trends on physicians and hospitals
- Describe the roles and responsibilities of the medical staff, board, and administration
- Explain the responsibilities of elected medical staff officers and department chairs
- Identify strategies for physicians to hold their peers accountable while helping them improve performance
- Identify effective practices for implementing a credentialing program that is fair to physicians and protects patients from potential harm
- Identify strategies for making peer review effective and fair
- Explain how to manage poor/marginal performance and disruptive behavior
- Identify the key drivers of hospital financial performance
- Identify the key elements of healthcare law impacting medical staff leaders
- Describe today’s new models of physician-hospital alignment

ATTENDEES
This program provides experienced, new, and potential physician leaders with the essential skills they need to make your medical staff effective. Organizations that send a team consisting of medical staff leaders, medical services professionals, their CEO, and their VPMA/CMO benefit the most from this program.

CE CREDITS
Please visit greeley.com/seminars for information about CE credits provided for this program.
“This course refocused my goals. It was informative, constructive, and energizing from beginning to end. I am completely impressed.”
—Bettina Smallman, MD
SUNY Upstate Medical University

Agenda
THURSDAY, OCTOBER 6 | DAY 1

7 AM to 8 AM  REGISTRATION AND CONTINENTAL BREAKFAST

8 AM to 12:30 PM  SEMINAR SESSION

Plenary Session: What We’re Doing in Healthcare Is Not Sustainable: Will you be part of the solution or part of the problem?
- Healthcare trends affecting physicians and hospitals
- The need to simultaneously cut costs and improve quality and safety
- Healthcare stands on a burning platform. Now what?
- What does it mean for each physician and every hospital to be part of the solution?

Rethinking the Medical Staff
- Who is responsible for the quality and safety of patient care?
- To whom and for what are physicians accountable?
- How should physician and hospital leaders work together to achieve success and great patient care?

Effective Medical Staff or Obsolete Medical Staff: How can physicians hold each other accountable for the quality of care we provide?
- The Physician Performance Pyramid: Keys to achieving great physician performance

Essentials of Credentialing and Privileging for Physician Leaders (Part I)
- Make patients the focus of credentialing and privileging decisions
- How to streamline credentialing so it is fair, effective, and efficient

12:30 PM  ADJOURN

Evening networking reception
Agenda
FRIDAY, OCTOBER 7 | DAY 2

7 AM to 8 AM  CONTINENTAL BREAKFAST
8 AM to 12:30 PM  SEMINAR SESSION

Essentials of Credentialing and Privileging for Physician Leaders (Part II)
- Making sense of laundry lists, core privileges, and competency clusters
- Managing today’s privileging challenges

Make Peer Review Effective, Efficient, and Fair
- How to drive bias out of peer review
- General competencies
- OPPE & FPPE

How to Manage Poor and Marginal Performance, Disruptive Behavior, and Impairment
- Manage the marginally performing physician
- Manage common performance challenges
- Identify and manage the impaired physician
- A step-by-step approach to intervene with a disruptive physician

How to Manage a Fair Hearing and Investigation
- Strategies to prevent fair hearings
- Effective investigations
- Dos and don’ts of corrective action
- Keys to an effective fair hearing

12:30 PM  ADJOURN
OCTOBER
6-8

Agenda

SATURDAY, OCTOBER 8 | DAY 3

7 AM to 8 AM
CONTINENTAL BREAKFAST

8 AM to 12:00 PM
SEMINAR SESSION

Regulatory Compliance Made Simple
- What do the CMS, Joint Commission, DNV, HFAP, and CIHQ really require?
- Stop making compliance a burden for physicians and staff and see it as an opportunity
- Process simplification as a strategy for better compliance and improved physician-hospital alignment

Legal Issues: The top 10 you need to know to stay out of trouble
1. Corporate negligence
2. The legal status of bylaws
3. Exclusive contracting
4. EMTALA
5. HCQIA
6. NPDB reporting
7. Patient Protection and Affordable Care Act
8. Ethics in Physician Self-Referrals Law (Stark Law)
9. Anti-Kickback Statute
10. False Claims Act

Follow the Money: A crash course in healthcare finance for physician leaders

I Want to Be Part of the Solution...Now What?
- Is the organized medical staff up to today’s challenges?
- What new models are helping improve quality and reduce costs?
  A review of patient-centered medical homes, service-line management and co-management, bundled payments, and ACOs/clinically integrated networks
- What must physicians and physician leaders do to make these models work?
- How does physician employment affect the organized medical staff and the new medical staff models?
- When multiple models coexist, who’s accountable to whom for what?

Putting It All Together to Leave a Legacy You Can Be Proud Of

12:00 PM
ADJOURN

Agenda is subject to change
TRAINING PHYSICIANS TO LEAD CLINICAL TRANSFORMATION

Achieve Breakthrough Improvements in Quality While Reducing Costs

Your service line, ACO, bundled payment, or medical home won’t succeed without physicians getting other physicians to change how they practice medicine. Do you and your fellow physician leaders have the critical skills for this difficult task?

All of today’s solutions to improve quality and reduce costs make only incremental changes. They don’t tackle the fundamentals that must change to make healthcare sustainable. That will require CLINICAL TRANSFORMATION, which cannot be achieved without trained, effective physician leaders. This course goes beyond buzzwords to teach participants the critical skills necessary to achieve physician engagement and breakthrough improvements in quality while reducing costs.

Regardless of your organization’s progress toward clinical transformation—or the models you have in play—this program will help your team of hospital executives and physician leaders compose the components necessary for an integrated solution. From vision and strategy to metrics, rewards/incentives, and real-world solutions for changing how physicians practice medicine, participants will leave with a practical action plan to achieve clinical transformation in their own organization.

BENEFITS

▷ Understand new solutions for engaging and motivating physicians
▷ Gain skills to lead physicians to change culture and change clinical practice
▷ Use the right incentives to motivate, align, and reward physicians
▷ Recognize and tackle systems barriers to breakthrough quality improvement and cost reduction
▷ Learn to make physician well-being and the avoidance of burnout goals of your clinical transformation initiatives
▷ Create a customized action plan for achieving clinical transformation in your own organization

CE CREDITS

Please visit greeley.com/seminars for information about CE credits provided for this program.
LEARNING OBJECTIVES

Upon completion of this program, participants will be able to:

- Recognize the unsustainability of and burning platform for change in healthcare today
- Understand the meaning of clinical integration and clinical transformation
- Explain the value of making and addressing the systems diagnosis to improve quality and reduce costs
- Describe the issues involved in developing an approach to distributing a bonus pool that is fair and motivates and rewards needed changes in clinical care
- Explain the difference between transactional leadership and transformational leadership
- Describe an approach to identifying critical situations and the vital few practitioner behaviors that provide the greatest leverage to improve quality and reduce costs

ATTENDEES

Any physician in, considering, or being groomed for a leadership role in your organization’s clinical transformation efforts should attend. Organizations will benefit the most when sending teams consisting of service line medical directors and administrative directors, service line co-management company leaders, leaders responsible for physician employment, ACO, PHO, IPA and/or medical home leaders, those charged with implementing bundled payments, those working in physician-management dyads, and physician executives and hospital executives.
"Greeley speakers provide the perfect ‘titration’ of style and content. This information will provide the foundation to address the challenges of the next three years."

—Jerry Kolins, MD, CMQO, Palomar Health, Escondido, CA

Agenda

THURSDAY, OCTOBER 6 | DAY 1

7 AM to 8 AM
REGISTRATION AND CONTINENTAL BREAKFAST

8 AM to 12:30 PM
SEMINAR SESSION

Plenary Session: What We’re Doing in Healthcare Is Not Sustainable: Will you be part of the solution or part of the problem?
- Healthcare trends affecting physicians and hospitals
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- Healthcare stands on a burning platform. Now what?
- What does it mean for each physician and every hospital to be part of the solution?

From Clinical Integration to Clinical Transformation: Evolution of a Moving Target
- What is Clinical Integration?
- Eye on the Prize: Managing the total cost of care
- What is Clinical Transformation?
- Why does the difference matter?
- Why is Clinical Transformation the right goal?

In God we trust...All others must bring data!
- How to get and work with the data you need to transform clinical care (Round 1)
- What do you need to know?
- What will you measure to know it?
- What questions will the data need to answer?
- What will we do once we know the answers from the data?

12:30 PM
ADJOURN

Evening networking reception
Agenda
FRIDAY, OCTOBER 7 | DAY 2

7 AM to 8 AM  CONTINENTAL BREAKFAST

8 AM to 12:30 PM  SEMINAR SESSION
(Case Study #1: Making the System Diagnosis—Drivers and Barriers for Quality and Cost)
 ▶ Thinking differently: Systems engineering as part of the solution
 ▶ Eight barriers to effecting change
 ▶ REALLY putting the patient at the center
 ▶ How to get and work with the data you need to transform clinical care (Round 2)
 ▶ Understanding and using the 4 quadrant model to transform healthcare: medical, psychological, social, and financial

CASE STUDY #2: Incentive Pool Design—How to use incentives to motivate, align, and reward
 ▶ What are you trying to accomplish with incentive pool design?
 ▶ Who should get how much of the bonus? Who decides?

12:30 PM  ADJOURN
Agenda

SATURDAY, OCTOBER 8 | DAY 3

7 AM to 8 AM  
CONTINENTAL BREAKFAST

8 AM to 12:00 PM  
SEMINAR SESSION

ENGAGING PHYSICIANS: WHY SHOULD I CARE? WHY SHOULD I CHANGE?

CASE STUDY #3: Empathy, Burnout and Physician Well-Being

▷ Moving from transactional leadership to transformational leadership
▷ Capturing physicians’ hearts and minds
▷ Physician well-being and resilience as a target of healthcare leadership
▷ Helping physicians rediscover the joy of medicine

CASE STUDY #4: The Vital Few: How to Be an “Influencer”

▷ Which critical moments in patient care make all the difference?
▷ What are the vital few practitioner behaviors in those critical moments for transforming quality, cost and empathy?

Creating an Action Plan For When You Get Home

12:00 PM  
ADJOURN

Agenda is subject to change
PEER REVIEW BOOT CAMP
Intensive Training for Committee Chairs, Members, and Support Staff

Overcome today's most challenging peer review issues
The medical staff often views peer review as punitive, when it can actually be a positive force for physician improvement. This course offers practical, in-depth training for physicians recently appointed to peer review positions, existing peer review leaders who seek new ideas on how to improve their case review and OPPE/FPPE methods, and staff who support peer review. Taught by experienced physician leaders from the practitioner’s perspective, Peer Review Boot Camp's format features a varied curriculum of group exercises, clinical case reviews, and case studies, with time for small group discussions and segments on ambulatory and ACO settings.

BENEFITS
- Perform reliable case review with less bias and greater efficiency
- Increase the use of aggregate data to identify patterns and trends
- Create a positive peer review culture
- Implement multispecialty-based peer review
- Encourage the medical staff to take peer review seriously

LEARNING OBJECTIVES
Upon completion of this program, participants will be able to:
- Explain the responsibilities of an effective peer review committee
- Implement methods to improve reliability and fairness of physician case review
- Select indicators to measure the six core competencies
- Develop a fair and efficient approach to OPPE and FPPE
- Create an effective action plan for FPPE

ATTENDEES
This program provides practitioners who lead or participate in peer review and staff who support peer review with the essential skills they need to succeed in their roles. Organizations benefit the most when they send teams consisting of medical staff quality/peer review committee chairs and members, designated physician reviewers, medical staff officers, chief medical officers/VPMAAs, medical directors, department chairs, quality directors and quality staff supporting peer review, and medical services professionals.

100% of participants in the most recent Peer Review Boot Camp said they would recommend this program to a colleague and responded “yes” when asked, “Will the information presented cause you to make any changes to your peer review-related tasks?”

“This program will greatly influence my role as the Chair of the Peer Review Committee: More effective and efficient meetings and process.”

~Armour Forse, MD, Alegent-Creighton Health, Omaha, NE

CE CREDITS
Please visit greeley.com/seminars for information about CE credits provided for this program.
Agenda

THURSDAY, OCTOBER 6 | DAY 1

7 AM to 8 AM
REGISTRATION AND CONTINENTAL BREAKFAST

8 AM to 12:30 PM
SEMINAR SESSION
Contemporary Peer Review In a Changing Healthcare Environment
- What are the goals of peer review?
- Peer review as the human resources functions of the medical staff

Creating Performance-Improvement Focused Peer Review
- Performance improvement to provider safer, more effective care
- Determining organizational culture
- Moving from punitive to positive: Creating a performance-improvement culture in your peer review program

The Greeley Pyramid
- Keys to achieving great practitioner performance and accountability
- Setting expectations and evaluating professional performance

Creating a Sound Structure for Effective Peer Review
- Legal concerns in peer review: Corporate negligence, immunity, and discoverability
- Managing conflicts of interest (case studies)
- Multispecialty peer review: Why and how?
- Integrating peer review into your network and addressing the ambulatory environment

12:30 PM
ADJOURN

Evening networking reception

“This is a great course for peer review—new members or experienced reviewers. There were so many great points and helpful suggestions. As chair of the peer review committee, this course will help me conduct meetings more efficiently and effectively. It will also help me orient new members more effectively and present our committee and our mission as much less intimidating.”

–James Groskreutz, MD, Chief of GI, Co-chair PRC, Gundersen Health System, Lacrosse, WI
Agenda
FRIDAY, OCTOBER 7 | DAY 2

7 AM to 8 AM  CONTINENTAL BREAKFAST

8 AM to 12:30 PM  SEMINAR SESSION
Running an Effective Peer Review Committee Meeting
- Sample agenda
- Leadership roles and styles
- Techniques and tips

Case Review: Step-by-Step to Getting It Right
- The case rating form: Reducing bias and increasing efficiency
- Case review indicators: What makes a good indicator?
- Bias and the effect on peer review: How to diminish it
- Human and system failures
- How does Just Culture fit in peer review?
- Identifying improvement opportunities
- Closing the loop and follow-up

Peer Review In Action: Discussion of sample clinical cases

12:30 PM  ADJOURN
Agenda

SATURDAY, OCTOBER 8 | DAY 3

7 AM to 8 AM
CONTINENTAL BREAKFAST

8 AM to 12:00 PM
SEMINAR SESSION
OPPE and FPPE: Using aggregate data for peer review
- Responsibilities of contemporary peer review committees
- Selecting physician performance measures: Data validity and rule and rate measures for OPPE (Exercise)
- Selecting physician performance measures: Indicator building (Exercise)
- Dealing with severity-adjusted data, patient satisfaction data, and physician attribution
- Performance improvement-focused peer review: Evaluating OPPE data (Case studies)
- Performance improvement-focused peer review: Creating effective FPPE plans and managing physician performance
- Is case review really working? Benchmarking your case review process and results

Bringing It Back Home: Next steps for your peer review program

12:00 PM
ADJOURN

Agenda is subject to change
THE CREDENTIALING SOLUTION
Best Practices for Solving Today’s Credentialing and Privileging Challenges

“Great information on physician leadership; well organized and developed for people of all backgrounds and job involvement. Great idea for interaction between physicians and administration. I have learned much more about privileging and confirming credentials, and have developed a new appreciation for the process of requests for new and renewal of privileges.”

–John Blevins, MD, Midland Memorial Hospital, Midland, TX

Manage today’s most difficult credentialing and privileging issues
In 1962, then-Joint Commission director Kenneth Babcock, MD, said, “There is no more controversial question in medical practice than who may be granted hospital privileges and to what extent.” This is arguably still true today. This contemporary credentialing and privileging course addresses not only the evergreen subject of maintaining a credentialing and privileging program that protects patients, is fair to physicians and clinicians, and complies with accreditation and regulatory requirements, but also incorporates integrated solutions that make sense for today’s aligned systems, hospitals, and medical staffs that also have employed physicians.

BENEFITS
▶ Match privileges granted to demonstrated current competence
▶ Manage low- and no-volume practitioners
▶ Address challenges related to privileging advanced practice professionals and employed physicians
▶ Manage high-risk credentialing in a way that protects patients and the hospital

LEARNING OBJECTIVES
Upon completion of this program, participants will be able to:
▶ Formulate options for how to credential and privilege low- and no-volume practitioners
▶ Set up effective strategies for minimizing the risk of negligent credentialing lawsuits
▶ Identify best practices for aligning privileges with competency
▶ Explain the implications of recent legal cases and landmark cases on credentialing practices today
▶ Illustrate a practical approach to effective focused professional practice evaluation (FPPE)
▶ Formulate options for managing dual (management, medical staff) responsibilities related to employed physicians
▶ Identify effective strategies for integrating and onboarding credentialed physicians

ATTENDEES
This course provides practitioners who lead or participate in credentialing and privileging and the staff who support credentialing and privileging with the essential skills they need to succeed. Organizations benefit the most when they send teams consisting of medical staff leaders, medical services professionals, their CEO, their VPMA/CMO, credentials committee department chairs and members, board members, risk managers, and quality directors.

CE CREDITS
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Agenda

THURSDAY, OCTOBER 6 | DAY 1

7 AM to 8 AM
REGISTRATION AND CONTINENTAL BREAKFAST

8 AM to 12:30 PM
(SEMINAR SESSION
Principles of Effective Credentialing and Privileging
- Controlling pressure from influential groups or individuals to credential quickly
- Dealing with superb clinicians with sub-optimal citizenship
- Balancing patient care, physician success, and hospital success
- Deciding who must be credentialed and privileged
- Going beyond the traditional steps of credentialing
- Managing unusual privileging requests
- Obtaining the most value from peer references
- Matching competency with clinical privileges

Roles and Responsibilities in Credentialing

Landmark Cases Establishing Legal Precedent
- A face with many names (e.g., negligent credentialing, corporate negligence, negligent selection)
- Doctrine of charitable immunity
- Duty to exercise due care
- Protection from immunity

Current Legal Cases, Lessons Learned
- Grandfathering—friend or foe?
- Responding to professional reference requests
- Challenges to precautionary suspension

Evolving Credentialing Standards (Initial & Reappointment)
- Leading credentialing practices to protect patients, healthcare organizations, and practitioners
- Value-added credentialing elements

Applying the “Four Steps” to a Physician Applicant
- The good, the bad, and the ugly in bylaws statements
- An exercise in red flag management using the Four Steps of Credentialing

12:30 PM
ADJOURN

Evening networking reception
Agenda
FRIDAY, OCTOBER 7 | DAY 2

7 AM to 8 AM
CONTINENTAL BREAKFAST

8 AM to 12:30 PM
SEMINAR SESSION
The Greeley Pyramid
▷ Keys to achieving great physician performance
▷ Accountability of the medical staff

APP Conundrum: How to manage their expanding role
▷ Addressing the expanding roles or scope creep in a nontraditional training environment
▷ Determining organizational culture
▷ Liability carrier considerations
▷ Privileging—Which comes first, the chicken or the egg?
▷ Policy considerations

How to Create Privileging Criteria from A to Z: New privileges, technology, services, specialties, expanding scopes of practice
▷ Case studies
▷ Eight steps to successfully managing requests for new services and new technology

How to Manage Temporary Privileges to Mitigate Risk and Protect Patients
▷ Defining patient, community, and hospital need
▷ What can be done to reduce risk and protect patients?
▷ Where do locum tenens fit in this picture?

Employed Physicians: Who is Responsible—Management or the Medical Staff?
▷ Is it one size fits all?
▷ Case studies
  ◦ What went wrong?
  ◦ Who is responsible for addressing behavior and citizenship issues and clinical competency issues?
  ◦ NPDB reporting
▷ How to avoid physician employment misadventures

Credentialing Solutions for Clinical Integration and Physician Employment
▷ Decreasing duplication
▷ Increasing efficiency
▷ Increasing physician and staff satisfaction

12:30 PM
ADJOURN
Agenda

SATURDAY, OCTOBER 8 | DAY 3

7 AM to 8 AM
CONTINENTAL BREAKFAST

8 AM to 12:00 PM
SEMINAR SESSION
Performance Monitoring to Cover All the Bases
- Accreditation requirements
- Focused Professional Practice Evaluation (FPPE)
- Ongoing Professional Practice Evaluation (OPPE)

Potpourri of Competency Assessment Challenges Due to Low- and No-Volume
- Lack of inpatient activity
- “Just in case” coverage
- Single practitioners in a specialty
- No current clinical activity
- The increasingly narrow practice

The Aging Physician
- Strategies to protect patients and support the practitioner
- Aging is not for sissies
- Analogies with medicine
- Accreditation requirements
- Policy considerations

12:00 PM
ADJOURN

Agenda is subject to change
**ADVANCED PHYSICIAN LEADERSHIP RETREAT**


**You’re not alone in the medical staff, hospital, or healthcare system challenges you face**

Physician leaders today need new skills and knowledge to be effective. From serving as medical staff officers, department chairs, and medical directors to leading service lines, physician-management dyads, ACOs and more, physicians must both lead and collaborate with others in tackling critical operational and business challenges. The Advanced Physician Leadership Retreat trains participants in many fundamental tools for being an effective leader in the new organizational models of today.

This hands-on retreat employs case-based learning, discussion, and skill-building to prepare participants to take on the toughest and most complex real-world challenges they’ll face. Faculty teach critical management skills, such as how to lead and run teams to achieve organizational strategic goals—including the fine arts of communication, negotiation, trust-building, mediation, and conflict resolution. They also cover the business side of the job—such as the nuts and bolts of making sound financial decisions as well as optimizing power and influence within new organizational structures.

**LEARNING OBJECTIVES**

**Program goal:** As healthcare transitions toward value-based payment models, this program will equip physician leaders with new knowledge and skills to be more effective in their evolving roles in healthcare leadership.

**Attendees will include:** Experienced, new and prospective medical directors; service line leaders; employed physician group leaders, ACO/CIN leaders; physician-management dyad leaders; clinical transformation leaders; CMO/VPMAs; medical staff officers, and department chairs.

Upon completion of the program, participants should be able to:

- Build and lead successful teams composed of physicians and non-physicians
- Employ self-awareness and self-regulation to enhance their leadership effectiveness
- Utilize understanding personality differences to best motivate others to succeed in their roles
- Understand and work with the sources of power and influence in organizations
- Describe strategies for rebuilding trust between parties once it is broken
- Demonstrate the ability to make sound financial decisions that balance effective patient care and provider success
- Develop a balanced approach to align compensation of physicians with organizational goals
- Assess the financial performance of services and products
- Skillfully manage and resolve conflicts
- Conduct an effective negotiation
- Facilitate an effective mediation between other parties

**CE CREDITS**

Please visit greeley.com/seminars for information about CE credits provided for this program.
Agenda
SATURDAY, OCTOBER 8 | DAY 1

12:00 to 12:30 PM  LUNCH PROVIDED IN ROOM

12:30 to 4:30 PM  MOVING FROM SUCCEEDING AS AN INDIVIDUAL TO SUCCEEDING AS A TEAM

How to Build and Manage Effective Teams
▷ Matching tasks and talents
▷ Engaging and aligning the team to the organization
▷ Understanding interdependence in your organization
▷ Moving from a dysfunctional team to a functional team

How to Recognize and Strengthen Your Leadership Skills
▷ How do you do your work?
  - Managing yourself
  - Self-mastery = Self-awareness + Self-regulation + Self-motivation
▷ How do you work with others?
  - Understanding and using emotional intelligence
  - The use and abuse of personality inventories
  - How to build on your strengths and manage your vulnerabilities

How to Understand and Work with Power and Influence (With and Without Authority)
▷ How to identify and optimize your sources of power
▷ How to utilize influence and motivation

How to Build Trust in You and the Team
▷ Why is trust the one thing that changes everything?
▷ How to earn the trust of others
▷ How to earn trust in your team
▷ How to rebuild trust once it’s been broken

4:30 PM  ADJOURN
Agenda

SUNDAY, OCTOBER 9 | DAY 2

6:30 to 7:00 AM  CONTINENTAL BREAKFAST

7:00 to 11:00 AM  GETTING THE WORK DONE: MAKING WISE DECISIONS AND NEGOTIATING FOR SUCCESS

How to Make Sound Financial Decisions

- **Case Study: The Unprofitable Service: What do the numbers mean? How can we fix it?**
  - How to understand and use:
    - Fixed vs. variable costs
    - Contribution margins
    - Break-even analysis
    - Identifying leverage for cost per case
    - Diagnosing and reducing cost drivers

- **Case Study: The New Technology: Should We Buy One?**
  - How to understand and use:
    - Return on investment
    - Pay-back period
    - Net present value

How to Negotiate and Mediate Successfully without Creating a “Win or Lose” Outcome

- **Negotiation Case Study:** Who gets the hospitalists when there aren’t enough to go around?
- **Negotiation Case Study:** Determining the salary for a newly hired physician
- **Negotiation Case Study:** I need that/But I need it too
- **Mediation Case Study:** Who decides what equipment will be bought for the new operating rooms?
- **Negotiation Lessons Learned**

Taking the Tools Home: What Will You Do Differently Because Of What You’ve Learned?

11:00 AM  ADJOURN

Agenda is subject to change
Meet Your Greeley Program Faculty

PROFESSIONALS COLLABORATING WITH FELLOW PROFESSIONALS TO HELP YOU SUCCEED

THOMAS ANTHONY, JD

Mr. Anthony is a partner and chair of the healthcare practice group in the law firm of Frost Brown Todd, LLC, in Cincinnati. He is general counsel to hospitals regarding medical staff bylaws and related matters, physician relations, the acquisition of medical groups, corporate governance, acquisitions of outpatient and ancillary facilities, strategic alliances and joint ventures, the establishment of provider-based facilities, executive employment agreements, Medicare compliance, contracting, and employment matters.

CAROL S. CAIRNS, CPMSM, CPCS

Carol S. Cairns, CPMSM, CPCS, is a senior consultant with The Greeley Company, and a recognized expert in the field. She presents frequently on subjects such as basic and advanced credentialing and privileging, core privileging, APP credentialing, the CMS Conditions of Participation, and the standards of—and survey preparation for—The Joint Commission, the National Committee for Quality Assurance (NCQA), and the Healthcare Facilities Accreditation Program (HFAP).

JOSEPH D. COOPER, MD

Dr. Cooper is a senior consultant with The Greeley Company. He is a physician leader who brings more than 25 years of experience in medical staff functions and affairs to his work with physicians, hospitals, and healthcare organizations across the country, consulting in the areas of medical staff organizational functions, governance and bylaws, peer review, and credentialing and privileging.

ANDREW J. CURTIN, MD, MBA

Andrew J. Curtin, MD, MBA, is a board certified, practicing radiologist with expertise in neuroradiology. Dr. Curtin holds an executive MBA from Temple University Fox School of Business. He provides education on medical staff organizational functions; new medical staff leaders’ roles and responsibilities; the medical staff-board relationship (board and physician perspectives); credentialing and privileging; low- and no-volume practitioners; OPPE/FPPE; how to conduct peer review non-punitively; and practitioner conflict, alignment, and behavioral issues.
TAREK ELSAWY, MD, FACP

Dr. Elsawy is President and CEO of Reliant Medical Group, based in MA. An internist, Dr. Elsawy previously spent nine years with the Cleveland Clinic, in Cleveland, OH, in various executive roles—including Vice President of Cleveland Clinic Regional Hospitals & Family Health Centers. There, he focused on the development and implementation of a clinical integration strategy and on collaborations on population health management. He served on the Board of Trustees for the Cleveland Clinic’s Community Physician Partnership and Marymount Hospital.

MARY HOPPA, MD, MBA

Dr. Mary Hoppa is a senior consultant with The Greeley Company. She has worked with Greeley since 2006, focusing on medical staff operations, bylaws, peer review, and Joint Commission accreditation and CMS compliance. Dr. Hoppa is a sought after speaker and the author of several books. Prior to joining The Greeley Company, Dr. Hoppa was a Family Medicine physician for 15 years, including her roles as Chief Medical Officer at Methodist Hospital in Merrillville, IN and as a member of the Iowa Board of Medical Examiners. Dr. Hoppa is a graduate of the University of Wisconsin Medical School and School of Business. She received her residency training at the Mercy/St. Luke’s Family Practice in Davenport, IA.

BRADLEY M. LEONARD, MD, MBA, FACC

Bradley M. Leonard, MD, MBA, FACC, consults in the areas of quality, patient safety, physician leadership, and healthcare organizational behavior, and maintains a busy private practice in interventional cardiology. He is the former chief medical officer for the STEEEP Global Institute, a division of the Baylor Health Care System that helps external organizations improve healthcare quality in the areas of safety, timeliness, efficacy, efficiency, equity and patient-centeredness. He also served as chair of the Congestive Heart Failure Council for Baylor, addressing reduction of readmissions and improvements to the delivery of integrated patient care.

JAMES C. MARTIN, MD

Dr. Martin is chief medical officer for the CHRISTUS Santa Rosa Health Corp. in San Antonio, TX. He is engaged in developing a clinical organization modeled around small groups of independent practitioners and patient-centered medical home recognition. He continues in a continuity patient practice of almost 40 years. He provides education on clinical integration and on physician-hospital alignment issues, with special interest in patient-centered medical homes. He served as president of the Texas Academy of Family Physicians, the American Academy of Family Physicians, and the American Board of Family Medicine, and was founding chair of TransforMED.
SALLY J. PELLETIER, CPMSM, CPCS
Sally Pelletier, CPMSM, CPCS, is a senior consultant and chief credentialing officer with The Greeley Company. She brings nearly two decades of credentialing and privileging experience to her work with medical staff leaders and medical services professionals across the nation. Pelletier advises clients in the areas of accreditation compliance, credentialing and privileging assessment and redesign, medical services department assessments, and leadership and development training for medical services professionals.

RICK A. SHEFF, MD
Dr. Sheff is principal and chief medical officer with The Greeley Company. He brings more than 25 years of healthcare management and leadership experience to his work with physicians, hospitals, and healthcare systems across the country. With his distinctive combination of medical, healthcare, and management acumen, Dr. Sheff develops tailored solutions to the unique needs of physicians and hospitals.

DAVID P. TARANTINO, MD, MBA
David P. Tarantino, MD, MBA, is a senior consultant with The Greeley Company. He works with healthcare organizations nationwide in the areas of medical staff effectiveness, peer review, and clinical operations improvement. A board-certified practicing anesthesiologist and pain medicine specialist, Dr. Tarantino also serves as Cape Regional Medical Center’s (Cape May, NJ) chief medical officer and president of the its employed physician practices. Previously, he was chair of the Department of Anesthesiology and Perioperative Medicine at MedStar Health Franklin Square Medical Center in Baltimore, MD.
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