



# Adapting, Responding & Reconnecting IN THE NEW NORMAL

SAVE THE DATE! FEBRUARY 8-10

VIRTUAL CONFERENCE | #HCAAEXECFORUM | HCAA.ORG



## 2021 Executive Forum Speakers

*Speakers as of 12/10/20 – Speaker and topics are subject to change*



### **Conference Emcee: Ernie Clevenger, President, CareHere, LLC**

Mr. Clevenger is President of CareHere, LLC, a Brentwood-based company. CareHere provides onsite medical, wellness and pharmacy management for public and private employers.

Mr. Clevenger is widely known for the weekly *MyHealthGuide Newsletter*, going each week to over 5,000 subscribers. The *Newsletter* provides a compilation of selected articles impacting TPAs, Stop Loss Carriers and MGUs, self-funded employers and others in the self-funded medical and work comp arena.

CareHere onsite medical, wellness and pharmacy centers, offer appointment scheduler, electronic medical records, patient lab reporting, and more, enable over 600,000 appointments annually. Physicians are recruited from the local area. CareHere operates 120 clinics in 20 states.

Mr. Clevenger's education includes and a BA in Mathematics from David Lipscomb University, MBA from Vanderbilt University, FLMI from the Fellow Life Management Institute and a recently earned Black Belt in Taekwondo.



### **Carol Berry, Chief Executive Officer, HCAA**

As HCAA's Chief Executive Officer, Ms. Berry is responsible for increasing the industry presence of HCAA and for promoting membership activity and the value of connection. She is responsible for supporting the efforts of HCAA's Board to maintain and enhance current relationships with industry organizations and for creating new relationships, that bring value to HCAA. She also provides strategic direction and operational oversight for HCAA's staff. Ms. Berry reports to HCAA's Executive Board. Ms. Berry has extensive experience in health care, self-funding and software industries providing them with corporate leadership, operations consulting, product positioning and strategic planning services. She has held successful executive positions in self funding, managed care, behavioral health, and group medical insurance companies. She served as HCAA's President 2001-2002 and was awarded the HCAA designation of a Certified Self Funding Specialist® (CSFS®) in July 2009. She has been HCAA's first CEO since 2014.



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**HCAA President Carolyn Jarschke**

Carolyn Jarschke is a founder owner of QVI Risk Solutions, Inc., a Third-Party Administrator (TPA). QVI is a Certified Women Business Enterprise (WBE) and Emerging Small Business (ESB) focused on Quality, Value, and Innovation. In addition to traditional TPA services, QVI is administering their first captive, provides retiree billing services to public entities and partners with industry peers for BPO services. Prior to starting QVI in 2003, Carolyn was Vice President of Operations for LifeWise of Oregon. Her 30+ year carrier has included key positions at Pacific Health & Life, Western Benefits Administrators and Klamath Medical Service Bureau. She is a past President of the Health Care Administrators Association and has been an adjunct professor at Central Oregon Community College. Carolyn began her health administration career following the completion of an AS degree from OIT in Health Information Technology and holds a BS in International Business from Linfield College. She enjoys the challenges of being a business owner and entrepreneur. Carolyn is the Immediate Past President of the Rotary Club of Greater Bend, a licensed Oregon Broker and serves as the current Vice President of the HCAA Board of Directors.

## Monday February 8, 2021

**8:45 AM – 9:45 AM**

**KEYNOTE: JUST ONE PERCENT IN: THE FORCES SHAPING THE NEXT ECONOMY**  
**With Nancy Giordano**



**Nancy Giordano, Founder of Play Big Inc.**

Described as endlessly optimistic, Nancy is a strategic futurist with a drive to help enterprise organizations and visionary leaders transform to meet the escalating expectations ahead. Recognized as one of the world's top female futurists, she has spent her career building, shaping and evolving a portfolio of \$50 billion worth of major global brands. With the growing conviction of what will (and needs to) shift, executives value her unique abilities to sense and synthesize the terrain ahead and guide those ready to build more relevant and sustainable solutions.

With a career at three of the top global advertising agencies and as the founder of her own strategic inspiration company, Play Big Inc., Nancy has a rich history of advising and learning with some of the top companies in the world, including Nestle, Brinker International, The Coca Cola Company, Sprint, and Acumen.

In 2015 she took a leap to help shape a company of the future: artificial intelligence start-up, Lucid, and later went on to build a leadership summit designed to encourage c-suite execs to explore seven of the most disruptive emergent technologies for business.



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A 10-year TEDx curator (and world's first licensee), Nancy is a Singularity University guest lecturer, a frequent panelist at South by Southwest, creator of the first Career Fair For The Future event for college + high school students, and remains an active strategist. For the past two years she has been on the board of retail trade association GMDC, on the advisory council of both Retail Tomorrow and Future Frontiers, co-designed + produced a fintech conference to strengthen community banking, and is helping champion two brands poised to weave a more human, distributed internet: Holochain + Holo hosting. In addition, Nancy just joined Austin artificial services company, Kungfu AI, to help visionary enterprise leaders learn, harness and sharpen their business prowess via custom-designed AI applications.

A techno-optimist, Nancy is committed to advancing societal structures and new mindsets necessary to effectively harness the significant technology innovations heading our way and ensure a safe and thriving future for us all.

Her vibrant presentations are about answers to your toughest questions. She meticulously crafts her talks based on the specific needs of your audience, spending time with you in advance to pinpoint the critical issues. If you are looking for a high-energy futurist who thinks like a strategist and acts like a creative marketer, she may be the perfect speaker for your next event.

## 10:15 AM – 11:00 AM WHY ARE PHARMACEUTICAL REBATES NOW BEING ADMINISTERED OUT OF SWITZERLAND? With Rob Shelley



**Rob Shelley, Founding Partner of Leaf Health**

Rob has been working as an executive in the Pharmaceutical, Pharmacy Benefits Management, and Pharmacy Benefit Consulting sector for more than 30 years. Rob's passion is to advocate and help improve the overall competitive position of Leaf's clients without sacrificing care, or access to services of members.

His expertise includes a broad understanding of the entire health care landscape with a specialization in pharmaceutical benefit industry. Rob's area of knowledge includes, drug manufacturer formulary rebate administration, recent specialty drug costs and utilization trends, PBM Evaluation and audit. He also specializes in the areas of PBM pricing, regulatory and health plan Medicare Part D compliance.

Rob's past accomplishments include successful management of billion-dollar PBM procurements and audits for leading employers, carriers, TPAs and government entities. Rob was also invited to the White House on two separate occasions to discuss pending ACA legislation.



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Prior to creating Leaf Health, Rob specialized in drug manufacturer rebate programs at Gateway Health Partners. And previously, Rob was Sales Vice President for Optum Rx and corporate-wide Sales Vice President at Catamaran.

## 11:15 AM – 12:00 PM THE ACCELERATING DRIVE TOWARD HEALTH CARE VALUE With Brian Klepper



**Brian Klepper, PhD, Executive Vice President and Editor of The Validation Institute, Principal of Worksite Health Advisors**

Brian Klepper is Principal of [Worksite Health Advisors](#) and a nationally prominent health care commentator and strategist. He speaks, writes and advises extensively on high performance health care, primary care clinics and the management of clinical and financial risk.

A purchaser advocate, he has concentrated on the market and policy dynamics of the health care cost crisis, and readily available solutions to purchasers willing to approach the problem laterally. His current focus is on identifying and validating [high performing health care organizations](#) that consistently deliver better health outcomes at lower cost than usual approaches in high value niches, and then advocating for these companies' solutions in the marketplace.

## Tuesday February 9, 2021

### 8:30 AM – 9:30 AM COVID: NO MORE EXCUSES! (PANEL) With Rich Roge & Brooks Goodison



**Rich Roge, President of Delta Health Systems**

Since 2012 Rich Roge has been President of Delta Health Systems, an independent, privately held third-party medical benefits administrator with 200 employees located in Stockton, California. Delta provides complete self-insured benefits administration and population health management through a combination of in-house and vendor services for commercial, government and trust clients with populations of 500-15,000 lives.

In this role he oversees all aspects of the company, which include strategic planning, operations, finance, legal, regulatory compliance, IT, wellness, population health, sales and account management.

Roge's extensive background is rooted in managed care sales, marketing and executive leadership.



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He was formerly an independent consultant (2006-2012) advising health care and related companies on strategy, business development and divestiture, and served as interim President for a TPA. His clients included health plans, medical groups, benefits consultants and judicial receiverships.

Roge was Senior Vice President, Sales, Marketing and Product Development/Chief Sales Officer at PacifiCare Health Systems (1998-2006), where he had P&L responsibility for more than 2 million commercial and Labor and Trust members across 38 states and routinely achieved double-digit revenue, membership, loss ratio and gross margin improvements. He created the company's first integrated Product Development team and brought to market 15 new insurance and related products. He also helped lead reorganization initiatives and merger integration.

Roge was Vice President, Sales and Marketing at Health Net (1994-1998) where he had responsibility for 11 sales offices in California and managed more than 2500 clients from 50-10,000 employees.

Roge is also co-founder of Managed Care Executives for Africa, a 501c(3) devoted to creating impactful and sustainable health care improvements in the Democratic Republic of Congo and Malawi, Africa through the awareness and support of U.S. health care industry leaders.

He resides in Laguna Niguel, CA.



**Brooks Goodison, President, Diversified Group**

Brooks joined Diversified Group in 1996 where he was first an underwriter and later VP of Sales. In 2015, Brooks became a principal owner of Diversified Group. As President, he is responsible for development and implementation of firm-wide strategy and day-to-day firm leadership, including customer relations, strategic planning, business development, and public relations. He oversees all Diversified Group companies comprised of: Diversified Group Administration, Diversified Group Brokerage, Corporate Managed Health Services, and Corporate Fitness and Health.

Brooks has a proven executive management track record and over 20 years of experience in the Third-Party Administrator/Claims Administration space. Brooks takes a vision and makes it reality through sound strategy development. He takes pride in being referred to often as a "disruptor."

Brooks sits on the advisory boards of The PHIA Group and Advanced Medical Strategies. Brooks is a member of HCAA, The Society of Professional Benefit Administrators (SPBA) and the Self-Insurance Institute of America (SIIA).



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Brooks likes to spend time with his wife, Kim, and his three children – Aleia, Laina and Pearce. They reside in Connecticut and all enjoy spending time on the water in the summers. Brooks also coaches basketball with Kim for both of their daughter's teams. He also enjoys spending time with Pearce playing baseball and participating in Scouts. One of Brooks' personal recreational passions is Scuba Diving. Brooks and his family have two favorite vacation spots – Block Island in Rhode Island and The Cayman Islands. Brooks' favorite sport is college basketball, and he loves the UCONN Huskies.

**10:15 AM – 11:00 AM ARE THERE LIMITS TO TELEHEALTH? WOULD YOU CONSIDER TELE-SURGERY?  
With Dr. Nadine Hachach-Haram**



**Dr. Nadine Hachach-Haram, BEM, Founder of Proximie**

Dr. Nadine Hachach-Haram, BEM, the recipient of the British Empire Medal in the Queen's Birthday Honours for [2018](#), is an NHS surgeon, lecturer and clinical entrepreneur. Nadine drew on her passion for innovation, education, and global surgery to found Proximie, an augmented reality platform aiming to improve access to expert care and to scale clinical expertise. Through its patented platform doctors can virtually transport themselves into any clinical setting to visually and practically interact and collaborate. From marking up a patient to providing real-time virtual presence overlaid with content and a rich palate of augmented reality they aim to provide safe, accessible, and high-quality care to every patient around the world. Proximie has enjoyed significant success with early adoption by major medical institutions and device companies and has been covered by news agencies around the world. Dubbed by CNN the "Future of Surgery," Proximie has gone from strength to strength and won multiple awards including Foreign Press Association Science Story of the Year.

Nadine has been selected as an Endeavor entrepreneur, is a member of the Royal College of Surgeons' Commission on the Future of Surgery, consisting of some of the country's leading doctors, engineers, data experts, managers, and patient representatives with the objective to investigate the advances that will transform surgery over the next 20 years, and Faculty at Singularity & Exponential Medicine. She is also the Clinical lead for Innovation at Guys & St Thomas' Hospital

When she is not working, Nadine spends her time with her husband and 3 children in London.



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11:15 AM – 12:00 PM ‘HOBSERVATIONS’-A CHAT WITH HOBSON CARROLL  
With Steve Rasnick and Hobson Carroll



**Hobson Carroll**, President and primary consultant at MedRisk Actuarial Services, Inc., part of Entrust, a 90 Degree Benefits Company.

Hobson Carroll is President and primary consultant of MedRisk Actuarial Services, Inc., the actuarial resource within the Entrust group located near Houston, Texas. Entrust is a 90 Degrees Benefits company. Prior to joining Entrust in late 2011, he operated Vector Risk Analysis, LLC that he formed in 2000. VRA provided stop-loss rating manuals as well as experience analysis/reporting services to a variety of entities within the self-insurance industry. He has also consulted in a variety of niche accident, health and specialty risk areas requiring singular experience as well as forensic analytical skills.

Mr. Carroll has over 42 years of actuarial, operational, and management experience in general health insurance with specialization around employer-insured group health plans and the associated stop-loss insurance programs that protect them. He has consulted on projects involving health insurance and related subjects on 5 continents during his working career and was an annual guest lecturer at City University of London’s Cass Business School master’s level actuarial science program from 2001 through 2011.

Hobson has published numerous papers, articles, and reader response letters on subjects relating to health care financing, technical actuarial subjects, and general interest articles for the self-insurance industry. He has also provided testimony to several legislative and regulatory bodies and been a speaker or panel member industry conferences throughout his career. He graduated in 1974 from Coe College before a year of graduate mathematics work prior to embarking on his actuarial career. He currently resides outside Houston and enjoyed visiting his three grown children and two grandchildren prior to the pandemic restrictions on travel. Now he enjoys creative digital interactions instead.



**Steve Rasnick, President Self Insured Plans, a 90 Degree Benefits Company**

Mr. Rasnick’s broad insurance background includes previous positions as President of Gem Insurance Company, President of Foundation Health National Life Insurance Company, managed care organizations covering more than 800,000 members; Chairman of ProAmerica, a national PPO organization; President of The Travelers Plan Administrators, the third largest national benefits administrator, covering more than 1,000,000 members; President and founder of Claims Administration Services Inc., at the time, the largest TPA in Illinois.

He has over 35 years of employee benefit experience, having held senior level consulting positions with Reed Stenhouse, a division of Alexander & Alexander in Chicago, as well as having provided insurance consulting services to more than 300 groups in Illinois.



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Mr. Rasnick is a founding Director of the Self Insurance Institute Of Illinois, participated on the Steering Committee that drafted the Illinois TPA Licensing Regulations, is a past Director and Officer of the Self Insurance Institute of America, and has served on the boards of numerous insurance, managed care organizations, community hospitals and venture capital organizations.

Mr. Rasnick became a full-time resident of Naples, Florida in 1995, where he established a TPA to serve the interests of small to medium Florida employers. He was elected President of the Southwest Florida Association of Health Underwriters in 1998 and President of the Health Care Administrators Association (HCAA) in 2016. He is a graduate of Roosevelt University, attended John Marshall Law School, is a Fellow of The International Claims Organization and is a frequent national speaker on benefit issues, managed care, Consumer Directed Healthcare, self-funding, the development of Community Based and Provider Sponsored Health Plans, third party claims administration, Accountable Care Organizations and GASB.

**Wednesday February 10, 2021**

**8:30 – 9:30 AM**

**FROM BATTLEFIELD TO COVID EMERGENCY ROOM: LEADERSHIP UNDER PRESSURE**  
**With Dr. Sudip Bose**



**Dr. Sudip Bose, Bronze Star Recipient for Serving One of the Longest Combat Tours by a Physician since World War II; Leading Emergency Physician and Nationally Recognized Media Health Correspondent**

As a battalion surgeon during Operation Iraqi Freedom and beyond, Dr. Bose's service earned him the Bronze Star for the distinction of completing one of the longest combat tours by a physician since World War II. He is also the U.S. physician who treated Saddam Hussein after U.S. forces captured him from the spider hole.

During the Second Battle of Fallujah, he provided medical care in the streets while being protected by overhead snipers—he understands how to thrive in the extreme. Dr. Bose is one of America's most experienced doctors on mass casualty, disaster care, and PTSD. On stage, he characterizes his service in the Army as a humbling and transformational experience. He talks about the profound impact of treating war casualties, performing life-saving procedures during raids and patrols, and offering humanitarian care in Baghdad.

Dr. Bose uses battle-tested wisdom from experiences in the ER and on the battlefield to show audiences how lead lives of impact, service, and health, and shares the keys to staying grounded in the face of overwhelming circumstances.



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His background and uplifting, positive attitude enable him to embrace countless new challenges and ventures—in medicine, entrepreneurship, personal health, and life—and he has become a vocal advocate for improved health care for Americans.

Selected as one of the Leading Physicians of the World by the International Association of Healthcare Professionals, Dr. Bose is a practicing emergency physician and health correspondent for many national media outlets. He has appeared on the *Dr. Oz* show and frequently speaks on emergency medicine, mental health issues for veterans, PTSD, and promoting an individual's healthy mind and body. Because of his lifelong passion for veteran advocacy, Dr. Bose founded **The Battle Continues**, a 501c3 non-profit focused on helping veterans fight their health battles beyond combat.

10:15 -11:00 AM

## FINDING THE SILVER LINING: HOW TO EMERGE FROM COVID WITH AN IMPROVED APPROACH TO MENTAL HEALTH AND ADDICTION

With Sam Arsenault



**Sam Arsenault, Chief Quality Officer for Confidant Health**

Samantha (Sam) Arsenault is a quality measurement expert in the behavioral health space turned digital health innovator. Sam is the Chief Quality Officer for Confidant Health where she is working to make best in class mental health and addiction care accessible at people's fingertips by combining innovative technology and proven clinical models. Sam served as the Vice President of National Treatment Quality Initiatives for Shatterproof, a national nonprofit dedicated to reversing the addiction

crisis. In this role, she spearheaded the development of ATLAS™, a groundbreaking quality measurement system for addiction treatment facilities that combines methodologies from existing health care measurement platforms with consumer friendly crowd-sourcing approaches to bring transparency to the addiction space. Prior to joining Shatterproof, Sam worked on the Substance Use Prevention and Treatment Initiative at the Pew Charitable Trusts where she advanced policies to improve the addiction treatment infrastructure and payment systems and reduce the inappropriate use of prescription drugs on the state and federal level. She has been featured on national conference circuits and in the media, including on the TODAY Show and Inside Edition and is a fierce advocate that changing your behavior does not mean you need to interrupt your life or go bankrupt. She received a bachelor's degree in Economics, *summa cum laude*, and a master's Degree in Community Development and Planning both from Clark University.



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11:15 -12:00 PM

## ELECTION 2020... THE AFTERMATH With Sal Nuzzo



**Sal Nuzzo, CPN, The James Madison Institute**

Sal Nuzzo serves as CPN (Chief Policy Nerd) for The James Madison Institute - a non-profit economic think tank in Tallahassee Florida.

A native of high-tax/low-growth Connecticut, Sal happily left New England for Florida State University, a warmer climate, and a healthier economy.

Having spent more than 20 years engaged in the policy arena, he spends far too much time writing for publications like The Hill, Real Clear Policy, and American Thinker, and far too little time sipping cocktails on Florida beaches.

He serves as a member of several policy work groups that advise Congressional and White House leaders (both Republican and Democrat), which has caused only minor hypertension. Despite this, he is a hopeful optimist.

Sal has occasionally, through no desire or fault of his own, backed into notoriety. During the tax reform debate of 2017, the official White House website and Twitter account featured his Tampa Bay Times column among its “West Wing Reads” list, as one of five articles directly influencing the President’s policy position in the closing days of the debate. He was also named alongside Coach Pat Riley, Senator Marco Rubio, rapper Trick Daddy, and Fidel Castro as one of Miami’s “Dirty Dozen” for having “brought deep shame to Miami in 2016.” For the record, Sal lives nowhere near Miami.

The James Madison Institute has been Florida’s leading voice on free-market economic policies for more than 30 years. JMI’s mission is to serve as an objective resource for Florida’s policymakers and the public – advancing the principles of liberty, free enterprise, and limited government.