

2022 Executive Forum Speakers

Speakers as of 2/3/2022 – speaker and topics are subject to change



Conference Emcee: Ernie Clevenger, President and CTO, CareHere, LLC

Mr. Clevenger is President and CTO of CareHere, LLC, a Premise Health 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, which 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 career 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.

Tuesday February 22, 2022

8:30 AM – 9:30 AM

KEYNOTE: HEALTH CARE RESILIENCE



Dr. Marty Makary, New York Times Bestselling Author, Johns Hopkins Surgeon and Professor of Health Policy

Dr. Marty Makary is a New York Times bestselling author and leading voice for transparency in health care. He is the recipient of the 2020 Business Book of the Year Award for [*The Price We Pay*](#). A professor at the Johns Hopkins Bloomberg School of Public Health, he has published over 250 scientific articles on the re-design of health care, medical innovation, and vulnerable populations. Dr. Makary has been elected to the National Academy of Medicine and is Editor-in-Chief of Medpage Today. He has written for *The Wall Street Journal*, *The New York Times*, and *USA Today* and is a frequent medical commentator.

Clinically, Dr. Makary practices pancreas surgery and has pioneered novel operations at Johns Hopkins. He is the recipient of the Nobility in Science Award from the National Pancreas Foundation and has been a visiting professor at over twenty medical schools.



Dr. Makary was the lead author of the original publications on the surgery checklist and later served in leadership roles at the World Health Organization. Dr. Makary is the chairman of the African Mission Healthcare medical advisory board and leads several health care collaboratives. His current research focuses on the underlying causes of disease and relationship-based medicine.

His book Unaccountable turned into the T.V. series "The Resident" and his newest bestselling book of [The Price We Pay](#) has been described by Don Berwick as "*a deep dive into the real issues driving up the price of health care*" and by Steve Forbes as "*A must-read for every American*". He speaks nationally and internationally on the appropriateness of care, lifestyle choices that influence health outcomes, employee health benefits design, and health care costs.

10:00 AM – 11:00 AM**SHOULD YOU BE WORRIED ABOUT CYBERSECURITY? A
CONVERSATION WITH RAFAEL PELAEZ AND RAMESH KUMAR****Rafael Pelaez, Vice President and CISO, of Pan-American Life Group**

Rafael is the CISO at Pan-American Life Group with nearly 20 years of dedicated experience in cybersecurity, while focusing on cyber as a Risk Management practitioner. Rafael is based out of Washington, DC. Prior to PALIG, Rafael served as a leader for Ernst & Young within their Cybersecurity practice. Prior to that, Rafael held leadership roles at Pfizer, Accenture, Carrefour Group and Schneider Electric.

**Ramesh Kumar, co-founder and CEO of zakipoint Health and host and creator of HCAA's podcasts, Voices of Self-Funding**

Ramesh Kumar is co-founder and CEO of zakipoint Health - a company on a mission to bring transparency, direction and value to healthcare consumers, with a goal to make healthcare affordable for self-insured employers. Ramesh is an expert in the field of technology, data analytics and value-based healthcare, and wants to bring these experiences to improve healthcare delivery.

Previously, Ramesh co-founded ActiveMedia Technology, a mobile marketing and CRM platform that grew to a multi-million-dollar business and was sold to a

publicly listed company. Ramesh holds B.A. and MEng from Oxford, UK and MSc. from University of Pennsylvania in Operations Research and has completed unit I of OPM program at Harvard Business School. Ramesh lives in Cambridge, MA with his wife Natasha and three kids. Loves playing squash, mentoring startups, and listening to podcasts.

Currently Ramesh is the host and creator of HCAA's podcasts, Voices of Self-Funding.

11:00 AM – NOON**AVOIDING THE GREAT RESIGNATION: ATTRACTING AND RETAINING EMPLOYEES WHEN EVERYONE'S LOOKING FOR AN EXIT****Curt Steinhorst, noted Speaker, Author and CEO of Focuswise Inc.**

There is a war for our attention right now. That is because human attention is the most limited, valuable and misunderstood resource in the modern marketplace.

Focus expert Curt Steinhorst helps leaders and teams take control of their attention and focus it on what matters most for their success. By applying the science of how the brain works to the reality of how we function in today's hyper-connected world, Curt provides actionable insights that help leaders break through the noise, achieve greater innovation and performance, and get the important work done.



Curt Steinhorst is the author of the bestselling book, 'Can I Have Your Attention?', a global speaker, and a regular Forbes contributor on leadership strategy. Diagnosed with ADD as a child, Curt knows intimately the challenges companies face to keep the attention of today's distracted workforce and customer. He began his public speaking career as a leading voice at the #1 global research organization on generational trends in the workplace and spent years studying the impact of tech on human behavior. He founded Focuswise to help leaders and organizations create cultures of focus and teams that thrive.

Today, Curt speaks around the globe on mastering focus and attention -- combining unforgettable stories, cutting-edge research from attention science, and practical case studies from global client engagements. Sought-after by global sales teams, CEOs of multibillion-dollar brands, NFL Hall of Famers, and anyone looking to become a better, more focused leader, Curt brings his unique viewpoint and entertaining speaking style to audiences worldwide. His many clients include AT&T, Southwest Airlines, Deloitte, JPMorgan Chase, Nike, BMI, The U.S. Naval Academy, and SAP, to name just a few.

1:30 PM – 2:30 PM

SELLING IN A VIRTUAL WORLD

**Robert Stevenson, noted Author and International Keynote Speaker**

Robert Stevenson is an expert at building a high-performance culture, improving efficiency, and accelerating growth. He is one of the most widely sought-after speakers in the world today, as well as a best-selling author. Robert was recently ranked #4 in the world by "LinkedIn Thinkers 360" as a ***Change Management Thought Leader & Influencer***. He has owned five companies, sold internationally in over twenty countries, along with holding positions from Salesman to Chief Executive Officer.

Robert has spoken to over 2,500 companies throughout the world and his research in the area of corporate and entrepreneurial success is extensive. **Over two million people** have benefitted from his powerful, practical, compelling and thought-provoking programs. He has interviewed over 10,000 employees, managers, and senior executives in over 250 industries. He calls upon his knowledge of what he has learned from some of the most innovative, resourceful, and powerful companies in the world, along with what he learned running his own companies and shares this wisdom with his audiences. He is a true master at blending facts, inspiration, conviction, and humor into all his programs.



His lectures are designed to prepare companies for the 21st century. With a powerful blend of experience, research, case studies, and competitor perspectives, Robert's original insights help organizations, business leaders, and associates understand how to unleash their future potential. With over 30 years of extensive corporate and entrepreneurial experience, he teaches companies and people how to deal with risk, competition, and the ever-changing business environment.

Mr. Stevenson's client list reads like a Who's Who in business. Companies like FedEx, Prudential, Lockheed Martin, Carrier, Anheuser-Busch, Chevron, American Express, and Berkshire Hathaway continue to rely on him for a fresh, unique perspective on businesses' most crucial issues.

**3:00 PM – 4:00 PM CONCIERGE CASE MANAGEMENT:
EMPOWERING PATIENTS, IMPACTING PLANS**

Sally-Ann Polson, President & CEO, MedWatch and Casey Billington, BSN, RN, CCTC, Co-Founder and COO, Concierge Nurse Navigators, moderated by John Youngs, CSFS, CEO, Prodigy Health Insurance Services, LLC



Sally-Ann Polson, President and CEO, Medwatch

Sally-Ann Polson's initial venture into health care set the stage for an exciting and varied career. After University Ms. Polson entered the Peace Corps in Gambia, West Africa, and went on to develop a Primary Health Care System for a 50-village area that had never had healthcare services. Ms. Polson was recognized by the World Health Organization for developing the "model" for primary health systems in the third world.

Upon returning to the United States, Ms. Polson held management positions with the American Red Cross, and INOVA, the Metropolitan Washington D.C. area's largest Health Care System. During her tenure with INOVA, Polson was charged with developing corporate health programs and starting a new Cost Containment Company, Health Cost Consultants. In 1989, Polson transitioned to Senior Vice President of INOVA and President of Health Cost Consultants and created a medical management firm providing software and medical management services to TPAs,



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self-insured employer groups and health and welfare funds nationwide. HCC was successful and eventually sold to AETNA.

Ms. Polson spent the next 12 years as Executive Vice President of American Health Holding (AHH) applying her broad-base clinical, technical and business acumen to lead AHH from a small managed care company to becoming the largest in the industry in cost containment.

Now, as President & CEO of MedWatch and partnering in her own company with other industry experts, Ms. Polson is addressing the “Pain Points” of the Industry and delivering services that are truly making a difference in the medical management and cost of healthcare.

Ms. Polson is passionate about health cost containment and fiscal control and continues to successfully create change in the industry benefiting both the patients and the health plans and other payors. Ms. Polson received her undergraduate degree with honors from Sweet Briar College and her graduate business education from the Darden School at the University of Virginia. Sally Ann joined MedWatch in 2011.



Casey Billington, BSN, RN, CCTC, Co-Founder and COO, Concierge Nurse Navigators

After watching her grandmother suffer and ultimately pass away from liver failure, Casey knew she was being called to the medical profession to care for others. During her 20-year nursing career, Casey has worked for large academic medical institutions specializing in solid organ transplantation and hospital quality.

Casey Co-founded Concierge Nurse Navigators where she currently serves as the Chief Operating Officer. The mission for Concierge Nurse Navigators is clear, help achieve better health outcomes one relationship at a time. Over the past year Concierge Nurse Navigators have been able to help reduce misdiagnoses and improve health outcomes for more than 5,000 individuals using a quality driven approach.

Casey credits her dedicated team of compassionate nurses for the company's success. Without their support, changing the disease states of communities would be an insurmountable task.


John Youngs, CSFS, CEO, Prodigy Health Insurance Services, LLC

With more than 38 years in the insurance industry as an underwriter, compliance officer, provider network developer and in sales management. John is the current the CEO of Prodigy Health Insurance Services, a full-service stop-loss MGU.

Over the years, John has built and owned a network company specializing in PPO, integrated delivery models and capitated provider networks, also having developed self-funded group captive solutions as a captive insurance owner. John has devoted his career to improving access and affordability of

healthcare for all Americans.

Outside of healthcare, John is actively involved in multiple charities with a focus on forgotten and at-risk children and human trafficking, as well as Fellowship of Christian Athletes.

4:00 PM – 5:00 PM
**THE FUTURE OF HEALTH & MEDICINE:
WHERE CAN TECHNOLOGY TAKE US?**

Dr. Daniel Kraft, Physician, Scientist, Inventor, Entrepreneur and Innovator

Daniel Kraft is a Stanford and Harvard trained physician-scientist, inventor, entrepreneur and innovator and is serving as the Chair of the [XPRIZE Pandemic Alliance Task Force](#). With over 25 years of experience in clinical practice, biomedical research and healthcare innovation, Kraft has served as Faculty Chair for Medicine at [Singularity University](#) since its inception, and is the Founder and Chair of [Exponential Medicine](#), a program that explores convergent, rapidly developing technologies and their potential in biomedicine

and healthcare. Following undergraduate degrees from Brown University and medical school at Stanford, Daniel was Board Certified in both Internal Medicine & Pediatrics after completing a Harvard residency at the Massachusetts General Hospital & Boston Children's Hospital, and fellowships in hematology, oncology and bone marrow transplantation at Stanford.

Wednesday February 23, 2022

8:30 AM – 9:30

**HOW TO EQUIP AND EMPOWER PATIENTS TO
LOWER HEALTH CARE COSTS**



**Marshall Allen, noted Author of “Never Pay the First Bill,” Journalist
and Investigative Reporter**

Marshall Allen is the author of “[Never Pay the First Bill: And Other Ways to Fight the Health Care System and Win](#)”, and founder of Allen Health Academy. Marshall spent 15 years investigating the health care system as a journalist, including a decade as a reporter for ProPublica. Marshall is a two-time Pulitzer Prize finalist and recipient of the Harvard Kennedy School’s Goldsmith Prize for Investigative Reporting. He has also taught investigative reporting for more than a decade. He now works for the Office of the Inspector General for the U.S. Department of Health and Human Services and runs Allen Health Academy to help boost the health care literacy of working Americans.

10:00 AM – 11:00 AM

**FINDING INTERESTING WAYS TO NAVIGATE THE LATEST LEGAL
CHANGES WHILE SERVING YOUR CLIENTS IN NEW AND BETTER WAYS**



**John Barlament, Employee Benefits Attorney, Reinhart Boerner Van
Deuren**

John Barlament is an Employee Benefits attorney with the law firm of Reinhart Boerner Van Deuren. John works with third party administrators, pharmacy benefit managers, plan sponsors and others on all aspects of employee benefits law, with an emphasis on health and welfare plan matters. He is a noted national author and speaker on these topics.



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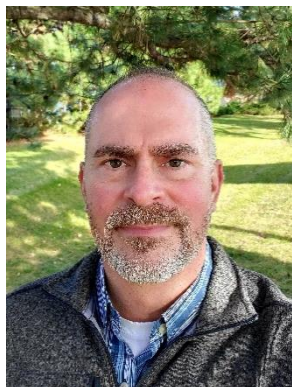
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Michelle Bounce, COO, Integrator, J.P. Farley Corporation.

"This journey is a personal one for me. The entire healthcare ecosystem seems to be built around treating people as if they are nothing more than a transaction. It is my passion to put the HUMAN back into the process. We never can forget that this is not just a bill, a procedure, a date of service, a diagnosis. This is a human being that is going through something, and we have the opportunity to show compassion and support during this time for them. We have the opportunity to make a difference and WE WILL! I am thankful to be able to service our members and clients every day."

Michelle has been with J.P. Farley since 2007 and has been a top performer in every position within the organization. Her insight into each department has provided her with the knowledge to begin rebuilding the typical structure of a TPA to ensure much greater efficiencies through automation, the use of superior technologies, process improvements throughout the entire organization and valued relationships with integral vendors who carry the same excitement for change she has. Her enthusiasm for clean, automated processes stems from her desire to change the industry. She is uniquely passionate about humanizing the healthcare experience and strongly believes that significant change is required to improve the patient experience, create better outcomes and create better consumers of healthcare dollars. She has a strong desire to bring healthcare administration into the modern age. She is an active member of Vistage, licensed in the state of Ohio in life and health, studied Chemistry at Cleveland State University and is a reformed pharmaceutical representative. She is an avid reader of every genre and has an office full of framed beetles from all over the world which she will welcome you to visit every chance she gets. She insists that upon her retirement at the age of 102 she will run a farm in which she can take in older dogs having trouble getting adopted so they can live out their days in happiness.



Jeff Walter, President, Professional Benefit Administrators, Inc.

Jeff Walter has grown up with Professional Benefit Administrators, a family owned TPA since 1989. After his service in the Navy, much of his TPA career was spent in the development of systems, integrating technology, and strengthening operations. Having worked in sales roles, vendor management, finance, security and operations, Jeff now leads PBA as its President, transitioning the company to the second generation and through the challenges ahead.

11:00 AM – NOON**TRANSFORMING PERSONAL IMPACT AND TEAM CULTURE
WITH “YES, AND”****Galen Emanuele, International Keynote Speaker on Team Culture, EQ and Leadership**

Galen transforms the way teams and organizations approach and establish culture, perform together, and impact each other at work. His unique content is full of actionable tools to massively improve team dynamics, communication, EQ, and generate high-level performance and engagement. A highly sought-after international speaker, with clients including Microsoft, Safeway, and NASA, Galen is also a world-class improviser, having taught and performed improv for many years and toured with the cast from *Whose Line Is It Anyway?*

An authentic, captivating teacher and performer, Galen has a unique gift of cutting through the noise and fluffy language to translate broad concepts into simple, practical skills and mindsets. Developed over thousands of hours on stage working with audiences and teams, Galen’s profound truths and tangible takeaways permanently change the way humans show up in business and life.