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## **CURRICULUM VITAE**

**A. MICHAEL LA PENNA, MBA, MJ, CVA, CHC**

### *Education and Certifications*

Compliance Certification Board (Healthcare Compliance Certification Association) – CHC (Certification in Healthcare Compliance), 2021

Loyola University Chicago – Masters in Jurisprudence, Healthcare Concentration, 2020

Loyola University Chicago Graduate Program – Graduate Specialty Certificate, Health Care Compliance 2020

University of Chicago / Oxford University – Combined U of C / OU Valuation Programme, 2018

NACVA – Certification CVA (Certified Valuation Analyst), 2020

University of Chicago Graduate School of Business – MBA, Finance, 1984

University of Chicago Graduate Program – Graduate Specialty Certificate, Health Care Administration, 1984

Western Michigan University - BA, December 1975  
Majors in Economics and Group Social Sciences  
Minors in Mathematics and Business

### *Military*

Honorable Discharge - United States Army Reserves, 1968, Specialist Rating, Field Medical Corps, 394th Station Hospital, Grand Rapids, Michigan

### *Employment*

Principal and Founder  
The La Penna Group, Inc.  
Kentwood, Michigan  
June 1987 to Present

Health Care consulting specializing in financial and strategic issues related to business development and strategic financial planning for health care providers. Primary clients include hospitals, health systems, physicians, group practices, subspecialty practices, and corporations involved with these entities. Projects relate to feasibility analysis, business valuation, joint ventures, strategic planning, acquisitions, etc. Assignments also included the development of population management programs for nationally ranked industries and management of sub-capitated risk for urban-based health care systems.

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Principal and Co-Founder, METIS Assoc., Ltd.  
Health Care Consulting Firm Specializing in Capital Project Development  
February 1986 to May 1987

Health Care systems design, management audits, feasibility studies, acquisitions, health care network development, alternative delivery system evaluation. Client groups included hospitals, physicians, and other consulting firms.

President, Health Ventures Corporation  
Subsidiary Corporation of Mercy Health System of the Midlands  
April 1985 to February 1986

Established initial programming for this for-profit structure as the Chief Executive Officer following its organization in January 1985. Primary internal agency support included marketing and planning for the 1,100-bed system, as well as responsibility for management information systems. Direct client services ranged from facilities management for other health care entities (two community hospitals and a 250-bed nursing home) to outpatient services in both Iowa and Nebraska (surgery, home health, hospice, physical therapy, geriatrics, alternative services delivery). Scale of this position was 90 acute care beds, 250 skilled nursing home beds, 450 employees, \$20 million in annual revenues.

Director, Program Development  
Sisters of St. Joseph Health System  
and Borgess Medical Center  
October 1983 to May 1985

Responsible for program development through the Medical Center and its parent and affiliate corporations. Participated in corporate divestiture, development of joint ventures, market feasibility studies and business acquisitions. This position reported to the Senior Vice President for Finance and to the President of SSJHS. Project activities included two immediate medical care facilities, a multi-hospital home health care corporation, free-standing digital subtraction angiography unit, and a primary care group practice network. Liaison responsibilities included evaluation and support for community-based hospitals sponsored by the SSJ System.

Assistant VP, Ambulatory Care and Cardiovascular Services  
Borgess Medical Center  
October 1981 to October 1983

The creation of this position broadened Ambulatory Care Services to include inpatient and outpatient diagnostic cardiology. The position spanned departments which had revenue budgets of \$10,000,000 per annum, and 200 personnel. This promotion added EKG, Nuclear Cardiology, Cardiovascular Laboratory, Cardiac Rehabilitation, and Echocardiography, to the Ambulatory Care Services Division.

Director, Ambulatory Care Service  
Borgess Medical Center  
June 1979 to October 1981

Responsibilities consisted of operational control over the Emergency Department, Outpatient Surgery, Midwest Oncology Center, the Institute for Holistic Medicine, Employee Health Services, General Medicine Clinic, Surgery Clinic, Pediatric Clinic, and Outpatient Specialty Clinics. Development activities included complete reorganization of the Emergency Department, initiation of an outpatient birthing center, pain program, migrant health programs, critical care transport program, and hospital-based trauma service.

Executive Director  
Southwest Michigan EMS, Inc.  
June 1978 to June 1979

Development and design of a federal chartered agency responsible for the coordination of prehospital medical care for an eight-county area containing 22 hospitals, 80 ambulance services, and numerous public safety agencies. Duties included initial project funding, development of agency structure, goal formulation, as well as staff, board, and community orientation. In its first year of operation, the Southwest Michigan EMS program gained national recognition for many innovative programs in public relations and community education. The agency also surveyed the entire eight county health care catchment area and categorized each hospital and provider.

Business Economics Instructor  
Kalamazoo Valley Community College  
December 1975 to June 1978

Instructed courses in the following disciplines: General Business, Business Law, Sales Management, Marketing, Personnel Administration, Public Relations, Macroeconomics and Microeconomics. Developed programs for the college in Experience Based Education (business cooperative studies). Awarded continuing appointment and a special community service sabbatical to develop the regional emergency medical services agency.

Manager  
Diversified Business System  
May 1974 to December 1975

Proprietary interest in a data processing service firm. Activities included facilities management, account management, marketing, direct mailing services, computerized billing.

District Agent  
Prudential Insurance Company  
May 1973 to May 1974

Licensed representative in life, health, casualty, and securities. Over one million dollars in insurance volume was generated in a one-year period. Twice awarded distinguished sales awards.

Other experiences have included direct medical care provision in hospital and prehospital settings, general sales work, retailing, etc. Most of these work experiences occurred while attending college.

Board Memberships and Offices Held

Founding Board Member – The National Association of Worksite Health Centers  
Board Member – The Plastic Surgery Practices Solutions Corporation, appointed by the Board of the American Society of Plastic Surgeons  
Alliance for Health Board Member (West Michigan regional health planning agency)  
Diversihealth, Incorporated (Proprietary Health Care Development Agency)  
Homemedico Incorporated (Proprietary Home Health Agency – hospital JV)  
American Red Cross, Kalamazoo County Chapter (Former Chairperson)  
American Heart Association, Kalamazoo County Unit (Former Chairperson)  
Kalamazoo County Economic Development Corporation (Former Chairperson)  
Kalamazoo-Portage Advanced Life Support Corporation (Former Chairperson)  
Michigan Entrepreneur Association  
Constance Brown Hearing and Speech Center  
American Academy of Professional Practice Enhancement  
Kalamazoo County American Red Cross Safety Services Board (Former Chairperson)  
Kalamazoo County Overall Economic Development Program Committee (Former Chairperson)  
Kalamazoo County Emergency Medical Service Advisory Council (Former Chairperson)  
University of Michigan Research Committee on Emergency Air Transport  
Michigan Department of Public Health EMS Rules Committee

Memberships

Alliance for Health Robert Wood Johnson Grant for West Michigan (Aligning Forces for Quality) – Steering Committee Member  
Alliance for Health – Hospital Beds Standard Advisory Committee  
American Society of Law and Medicine  
Kalamazoo Foundation, Public Education Grant Committee  
University of Chicago Executive Program Club  
University of Chicago Graduate Program in Hospital Administration Alumni Association  
American College of Hospital Executives  
Healthcare Financial Management Association  
American College of Healthcare Marketing

Certifications / Awards

Meritorious Service Award - American Red Cross – 1979, 1983, 1984  
Appointee - Department of Health and Human Service National Evaluation Team for Emergency Medical Services – 1979, 1980

The Annual Service Award - National Safety Council Construction Safety Institute –  
1968, 1970, 1972  
Fellow - The American College of Health Care Marketing

Publications / Presentations

“Should You Opt Out of Medicare? Pros and Cons” (interviewed September 27, 2018 for Medscape article by Freelance writer, Leigh Page)

“What to Do When a Medical Practice Drops an Insurance Plan” (interviewed March 14, 2016 for Part B News article by Roy Edroso of Decision Health)

2016 Employer-Led Health Management Innovations Conference by Strategic Solutions Network: “Collaborating with Local Health Systems For Worksite Health & Wellness” Presentation, as Co-presenter with Ms. Judy Melaro-Gavigan of Wheaton Franciscan Healthcare, and “Leveraging the Latest Technology Solutions to Optimize Workplace Health” Panel Discussion, as Panelist and Panel Moderator (February 11-12, 2016 in Orlando, Florida)

“Engaging Directly with Employers – Delivery of Care to Self-Funded Benefit Plans,” Co-Speaker at the MGMA 2015 Annual Conference in Nashville, Tennessee (October 12, 2015)

"Lakeshore Manufacturers Offer On-Site Clinics to Combat Rising Health Care Costs," interviewed and quoted for article by John Wiegand, MiBiz (March 16, 2015)

The 2<sup>nd</sup> Annual 2015 Worksite Health Clinic & Wellness Innovations Conference by Strategic Solutions Network: "The Growing Role of Onsite Health Centers in the Changing Health Care Landscape," "Innovative Worksite Clinic Models – Trailblazing Beyond the Traditional for Large, Mid-Size, and Smaller Organizations," and "Debate: Does VOI Really Exist?" – Conference Co-Chairman, Presenter, Panel Moderator, and Debate Moderator (February 9-10, 2015 in Orlando, Florida)

"Metro-CHS Deal Could Bring Investment, Competition to Market" (February 2, 2015, MiBiz – interviewed and quoted for publication by Mark Sanchez)

La Penna, A. Michael. *Medical Staff Integration - Transactions and Transformation*. Boca Raton, Florida: Taylor & Francis Group, 2015

"On-site Clinic Industry," interviewed and quoted for article by Jeremy Cavness, CareATC, Inc. (November 4, 2014)

"On-Site Corporate Clinics Provide Business Class Care," interviewed and quoted for article by Barbara Horwitz-Bennett, Healthcare Design Magazine (October 13, 2014)

"Different Paths to Healthcare," Presenter at The Herman Miller/Nemschoff Four-Part Series: Consumer-Driven Healthcare #1, hosted by Chicago AIA Health Knowledge Community at Herman Miller Showroom, Merchandise Mart in Chicago, Illinois (September 18, 2014)

"Direct Contracts With Medical Providers Help Self-insured Employers Control Costs," interviewed and quoted for article by Karen Pallarito for Business Insurance (August 31, 2014)

"More Employers Moving to High-Deductible Health Plans," interviewed and quoted for article by Karen Pallarito for HealthDay (August 15, 2014)

"Self-Insurance on Steroids," interviewed and quoted for article by Bruce Shutan for The Self-Insurer (August 2014)

"Reforms Alter Pay Model for NYS Docs," interviewed and quoted by Gale Scott of Crain's New York Business (April 7, 2014)

Care Innovations Summit 2014 co-hosted by The Advisory Board Company and The Aspen Institute, as Panelist in Panel Session: "Innovative Settings for Care: The Answer to Access, Convenience, and Cost Challenges?" (February 27, 2014 in Washington, D.C.)

Work-Site Health Clinic & Wellness Innovations Conference by Strategic Solutions Network: "Next Generations Clinics-Innovative Work-site Clinic Models," "Measuring On-site Clinic ROI & VOI," and "Hard Metrics: ROI of Your On-site Clinic and its Health Management Programs" – Conference Chairman, Presenter, Panel Moderator, and Workshop Leader (January 28-29, 2014 in Orlando, Florida)

Midwest Business Group on Health Program of "Is Domestic or Foreign Medical Travel Right for Your Company?" as Presenter of "Domestic Medical Tourism, Medical Destinations, and Centers of Excellence – A Contracting Perspective – "Five-Star Health Care and Three-Star Hotels" (September 26, 2013 in Chicago, Illinois)

"Should an Employer-Sponsored Clinic Be Part of Your Benefits Strategy?" Half-Day Joint Conference by National Assoc. of Worksite Health Centers and Business Group on Health as Presenter of "The Legal, Tax and ACA Issues Impacting Onsite Health Centers" (September 11, 2013 at Briggs & Stratton, Wauwatosa, Wisconsin)

"Establishing an On-Site Health Clinic by Integrating Occupational Health and Primary Care" Web Conference Guest Presenter (August 14, 2013, Global Media Dynamics)

"Key Issues on Compliance and Vendor Selection" as Presenter and "Experience From the Field on Key Issues in Designing and Expanding On-site Health and Fitness Centers" as Co-Panelist (National Assoc. of Worksite Health Centers w/NE Business Group on Health, April 11, 2013 – New York City, New York)

"For the Local Physician Practice and For Other Premium Customers With Solid Business and Revenue History, Banks Are Eager to Connect" (March 25, 2013 – Medical Economics, In Depth/Money by David Bennett)

"Employer-Based Clinics: Providers and Consultants Show Hospitals the Way to Succeed" (December 2012, Volume 29, No. 12, Strategic Health Care Marketing – interviewed and quoted for publication by Sheryl S. Jackson)

"Raising the Stakes: Metro Health, Trinity Health Pursue Partners Amid Growing Consolidation Pressure in Healthcare Industry" (October 29, 2012, MiBiz – interviewed and quoted for publication by Mark Sanchez)

"Clinic Part of Cure For What Ails Walgreen – Facility at O'Hare Will Grow Revenue Beyond Pharmacies" (October 1, 2012, Crain's Chicago Business – interviewed and quoted for publication by Brigid Sweeney)

"Cultivating Primary Care Partnerships" Web Conference Guest Speaker (September 18, 2012, The Advisory Board Company)

"Health Care: A Real Fixer-Upper" (September 2012, Workforce Management – interviewed and quoted for publication by Rita Pyrellis)

"On-Site Medical & Wellness Clinics: Leveraging the Key Ingredients for an Integrated Center to Drive Clinical and Financial ROI" - 5th Annual Executive Forum on the Business of On-Site Employee Health & Wellness Clinics Pre-Conference Workshop (July 24, 2012 - Northbrook, IL)

"The Future of On-Site Health Clinics - Redefining Your Corporate Healthcare Strategy Through Innovation" – Panelist & Chair, 7th Annual Congress on On-site Employee Health Clinics - Worksite Health Leaders' Panel (July 19-20, 2012 - Boston, MA)

"How to Practice Medicine Without the Paperwork and Admin?" (July 5, 2012, Medscape News-Business of Medicine online – interviewed and quoted for publication by Mark Crane)

"CDHPs Put the Consumer in the Driver's Seat, but Employers 'Take the Wheel' with Workplace On-site Clinics" (Annual 2012 Issue, The Institute of Healthcare Consumerism)

"Employer Sponsored Onsite Clinics" Presentation to Northern Kentucky Employers - St. Elizabeth Healthcare/Business Health Services of Edgewood, KY (April 18, 2012 - Wilder, KY)

"5 Mistakes Doctors Make When Borrowing Money" (April 9, 2012, American Medical Association's American Medical News online – interviewed and quoted for publication)

"Budgeting and Forecasting," "Meeting Challenges to Profitability," and "Staffing and Incentives – Managing Your Practice's Money" (July/August 2011, Doctor's Digest – interviewed and quoted for publication)

World Congress/World Research Group – The Business of Onsite Employee Health Clinics Conference – Quantify and Demonstrate the Value of On-Site Healthcare Delivery as Part of an Integrated Approach to Healthcare Cost Management – Chair and Presenter of "Proof That All Healthcare is 'Local'" (July 26-28, 2011 - Chicago, IL)

"The Doctor Will See You Now...At Your Office – Workplace Clinics Making a Resurgence" (May 30, 2011, Modern Healthcare, interviewed and quoted by author, Rebecca Vesely)

“Best of Both Worlds? Practice Management Companies Are Making a Push for Primary Care Practices. Outsourcing Has Its Perks, But Look Carefully To Decide If It’s Right For You” (April 10, 2011, Medical Economics – interviewed and quoted by author, Morgan Lewis, Jr.)

“What Works, What Doesn’t, and Why?” Post Conference Workshop - 20th Annual Health Benefits Conference and Expo (HBCE) (January 31 – February 1, 2011 - Clearwater Beach, FL)

“The Future of On-Site Health Clinics – Redefining Your Corporate Healthcare Strategy Through Innovation” Panel Discussion and Workshop - Global Media Dynamics, 4th Annual Congress on On-Site Employee Health Clinics Conference (January 24-25, 2011 - Scottsdale, AZ)

“U-M Seeks Partnership with Munson – University approaches local officials as decision-time nears on Spectrum deal” (August 29, 2010, Traverse City Record-Eagle, interviewed and quoted by author, Bill O’Brien)

World Research Group’s “2nd Annual Maximizing ROI for Onsite Employee Health Clinics Conference – “Tuning Up the On-site Program for Peak Performance” and Conference Workshop Panelist for “Now That You’ve Got It Started, What’s Next?” (July 27-29, 2010 - San Diego, CA)

“What Makes a 5-Star Practice?” (May/June 2010, Doctor’s Digest, interviewed and quoted by author, Deborah Gesensway)

“Future Directions of Onsite Clinics” (April 13, 2010, Midwest Business Group on Health “Learning Network Program – The Use and Potential of Employer Onsite Clinics” - Chicago, IL)

“The Forum for the Advancement of On-site Clinics and Workforce Health: 2010 and Beyond” (Conference Facilitator, March 26, 2010, O’Hare Hilton Hotel - Chicago, IL)

La Penna, A. Michael. *Workplace Clinics and Employer Managed Healthcare: A Catalyst for Cost Savings and Improved Productivity*. New York: Taylor & Francis Group, 2010

“Alternative’ Healthcare: Access as a Revenue Source in a Consumer-Driven Market”(January/February 2010, Volume 55, Number 1, Journal of Healthcare Management)

“Your Practice and the Recession – Post-recession Planning” (November/December 2009 edition, Doctor’s Digest, Advisory Board – interviewed and quoted by author, Laura Gater)

“Metro Health Pumps Up Health Care, Hiring Cardiac Doctors, Planning for Growth” (October 14, 2009, The Grand Rapids Press, interviewed and quoted by author, Kyla King)

“Physician Alignment” (September 2009, Hospitals & Health Networks - quoted by author, Ken Terry)

“Expert Sees Michigan Health Care Facing Uncertain Future” (July 2009, Grand Rapids Business Journal Health Quarterly, interviewed and quoted by author, Pete Daly)



“MMPC prepares to vote on merger with Spectrum Health” (June 30, 2009, Grand Rapids News, interviewed and quoted by author, Pat Shellenbarger)

“Grand Rapids-area hospitals join the debate on health care reform” (June 29, 2009, Grand Rapids News, interviewed and quoted by author, Pat Shellenbarger)

“New Sources of Revenue in the Age of Connectivity.” Retrieved June 25, 2009, from [http://www.entrepreneur.com/tradejournals/article/193182095\\_2.html](http://www.entrepreneur.com/tradejournals/article/193182095_2.html)

“Rivalry Festers between Lakeshore’s Holland Hospital and Zeeland Community Hospital.” Retrieved June 25, 2009, from <http://www.bridging96.com/article/20090610/BRIDGING96/906089997/1122>

“Evaluating the Potential for Workplace On-site Health Services and Employer Managed Healthcare Options – What Works, What Doesn’t and Why?” (June 1-3, 2009, The Second Annual Congress on On-Site Employee Health Clinics, Global Media Dynamics, Las Vegas, NV)

“Health Projects Down Sharply Across Michigan” (May 21-27, 2009, Business Review Western Michigan, interviewed and quoted by author, Mark Sanchez)

“Pediatric Projects in Mich. Competing?” (April-8, 2009, Business Review Western Michigan, interviewed and quoted by author, Sven Gustafson)

“Workplace Medical Clinics: The Employer-Redesigned ‘Company Doctor’” (March/April 2009, Volume 54, Number 2, Journal of Healthcare Management)

“Employers as Providers: The Workplace On-Site Clinic and Its Implications for Change” (March 24, 2009, ACHE 2009 Congress on Healthcare Leadership, Chicago, IL)

“Evaluating the Potential for Workplace On-site Services and Employer Managed Health Care Options – What Works, What Doesn’t and Why?” (February 4, 2009, 18<sup>th</sup> Annual Health Benefits Conference and Expo, Tampa, FL)

“New Sources of Revenue in the Age of Connectivity” (January/February 2009, Volume 54, Number 1, Journal of Healthcare Management)

“Spectrum Health Officials Lobby State for Permission to Perform Heart, Lung and Liver Transplants” (January 16, 2009, The Grand Rapids Press, interviewed and quoted by author, Pat Shellenbarger)

“Physicians Feeling Economic Crisis” (January 6, 2009, LiveJournal.com, quoted by author, Robert Lowes)

“Spectrum Health Poised to Corner Heart-care Market” (September 14, 2008, The Grand Rapids Press - interviewed and quoted by author, Pat Shellenbarger)

“Political, Practical and Functional Barriers to the On-site Adventure—How to Anticipate and Overcome the Obstacles to Implementation” (July 22, 2008, On-Site Employee Health Congress: Best Practices on Building and Operating a Viable On-Site Clinic that Reduces Healthcare Costs and Ensures a Healthier Workforce, Chicago, Illinois)

“Health Care Transactions With Physicians: Key Legal and Valuation Issues” Teleconference Presentation (November 27, 2007, Ropes & Gray)

“On-site Clinics and Convenient Care Clinics: Their Emerging Role in Benefit Design” (July 21, 2007, The National Employee Benefits Summit, Atlanta, Georgia)

“Saint Vincent’s Plan Faces Obstacles: Medicaid Cuts, State Approvals Could Hold Hospital System Back As It Looks To Rebuild” (February 18, 2007, Crain’s New York Business, interviewed and quoted by author, Gale Scott)

“Hospitals Woo Docs from Rivals on Berger List: Physicians at Facilities Targeted to Close are Eager but Cautious” (January 14, 2007, Crain’s New York Business, interviewed and quoted by author, Gale Scott)

“Can an MSO Help” (November 3, 2006, Medical Economics, interviewed and quoted by author, Ken Terry)

“Practice Mergers: What Makes a Winner” (October 7, 2005, Medical Economics, interviewed and quoted by author, Ken Terry)

“Exclusive Survey: The Earnings Freeze—Now It’s Everybody’s Problem” (September 16, 2005, Medical Economics, interviewed and quoted by author Robert Lowes)

“One Cure for High Health Costs: In-House Clinics at Companies” (February 11, 2005, The Wall Street Journal, interviewed and quoted by author, Vanessa Fuhrmans)

“Why Big is Out” (August 20, 2004, Medical Economics, interviewed and quoted by Ken Terry)

“Health Care Cost Controls—Is It Time to Take Over the Asylum” (October 14, 2004, Charter Summit on Employer Managed Health Care Programs, Chicago, Illinois)

“What’s Your Practice Worth?” (April 11, 2003, Medical Economics, interviewed and quoted by author, Ken Terry)

“Clinical Service Joint Venturing: Business and Legal Considerations” (May 14, 2002, New Jersey Hospital Association, Princeton, New Jersey)

“Managed Care: Could You Live Without It? (December 3, 2001, Medical Economics, interviewed and quoted by author, Ken Terry)

“Cabrini Hires Financial Expert as CEO: Troubled Cabrini Medical Center Names a New Chief Executive with a Reputation as a Financial Expert” (August 14, 2000, Crain’s New York Business, interviewed and quoted by author, Judith Messina)

“Happy Together: What Makes a Practice Endure” (May 8, 2000, Medical Economics, interviewed and quoted by author, Anne L. Finger)

“Hospital Tries to Speed Healing” (May 8, 2000, Crain’s New York Business, interviewed and quoted by author, Anna Roboton)

“NY-Presbyterian Takes Venture Route: Hospital Enters Risky For-Profit Area” (May 12, 2000, Crain’s New York Business, interviewed and quoted by author, Judith Messina)

“Are You Fighting Over New Patients?” (November 20, 2000, Medical Economics, interviewed and quoted by author, Anita J. Slomski)

Special Presentation at the New York Physicians Network Members Meeting Sponsored by Bayer Corporation Pharmaceutical Division (April 25, 1999)

“Staying in Practice in the New Millennium” (April 22, 1999, American Osteopathic College of Medicine 1999 Midyear Educational Conference, Kansas City, Missouri)

“Catholics Plan Giant Merger of Hospitals” (January 25-31, 1999, Crain’s Health Pulse, interviewed and quoted by author, Barbara Benson)

“The PPM Meltdown: What Practices are Worth in Today’s Market” (January 25, 1999, Medical Economics, interviewed and quoted by author, Ken Terry)

“Price Drives Choice of Health Plans” (December 14, 1998, Crain’s New York Business, interviewed and quoted by author, Barbara Benson)

“PPMC Management Teams for Hire: Using Consulting Companies as In-House Executives” (November, 1998, PPM Profitability Update, interviewed and quoted by author, Yung-pei Chen)

“Practice Success in a Changing Market” (October 29, 1998, in conjunction with Searle Pharmaceuticals, New York, New York)

“Quick-Cut \$20,000 in Practice Expenses” (May 26, 1998, Medical Economics, interviewed and quoted by author, Robert Lowes)

“How Hospitals Can Lower Your Productivity” (January 26, 1998, Medical Economics, interviewed and quoted by author, Robert Lowes)

“How to Deal with a Stingy Boss” (January 12, 1998, Medical Economics, interviewed and quoted by author, Robert Lowes)

“Doctors on the Move” (December 8, 1997, Medical Economics, interviewed and quoted by author, Ken Terry)

“The Changing Economics of the Medical Practice - Pressures, Problems & Opportunities” (November 15, 1997, Capital Region Orthopaedic Associates, Albany, New York)

“The Emergence of Management Services Organizations (MSOs) and Their Implications for Physician Financial Services” (June 19, 1997, 1997 Health Care Industry Conference sponsored by North Carolina Association of Certified Public Accountants, Greensboro, North Carolina)

“Practice Management Issues” (March 27, 1997, Healthcare Financial Management Association West Michigan Chapter Business Meeting, Grand Rapids, Michigan)

“Do You Need a Broker to Help Sell Your Practice” (September 23, 1996, Medical Economics, interviewed and quoted by author, Robert Lowes)

“How a Group’s Personality Affects its Members” (September 23, 1996, Medical Economics, interviewed and quoted by author, Robert Lowes)

“Will Low Tide for Coastal Leave Doctors Beached?” (July 29, 1996, Medical Economics, interviewed and quoted by author, Robert Lowes)

“Changes Occurring in Healthcare in the Grand Rapids Area and Around the Country” (May 23, 1996, Grand Rapids Area Medical Managers’ Association meeting, Grand Rapids, Michigan)

“Your Most Crucial Decision: Who to Team Up With” (April 15, 1996, Medical Economics, interviewed and quoted by author, David Azevedo)

“Getting the Best Deal When You Sell Your Practice” (January 29, 1996, Medical Economics, interviewed and quoted by author, Ken Terry)

“The National Experience” (January 20, 1996, Manhattan Eye, Ear & Throat Hospital “Future of Ophthalmology” meeting, New York, New York)

“The Consultant’s Tool Chest” (January 5, 1996, PM Group Northern Regional Meeting, Chicago, Illinois)

“Should You Merge or Sell -- or Do Nothing?” (December 11, 1995, Medical Economics, interviewed and quoted by author, Ken Terry)

“Forecast for Doctors: Stronger Winds of Change” (December 11, 1995, Medical Economics, interviewed and quoted by author, Ken Terry)

“Can you Make a Killing with Your Own Practice?” (November 27, 1995, Medical Economics, interviewed and quoted by author, Robert L. Lowes)

"The MSO as a Tool in the Integration Process" (November 15, 1995, Oakwood Healthcare System's "Managing Care in Clinical Practice" seminar, Romulus, Michigan)

"Businesses Show Skepticism, Apathy About Hospital Merger" (November 1, 1995, The Grand Rapids Press, interviewed and contributed to article)

"Physician Practice Management" (October 12, 1995, 42nd Annual Fall Conference of The Michigan Chapters of Healthcare Financial Management Association, Ypsilanti, Michigan)

"Paying Physicians for Product Rather Than Productivity - Aligning Outcome Objectives with Physician Income Strategy" (October 5, 1995, sponsored by Strategic Research Institute, New York, New York)

"The Many Pluses of Investing in Your Own MSO" (April 10, 1995, Medical Economics, interviewed and quoted by author, Ken Terry)

"Would an MSO Make Your Life Easier?" (April 10, 1995, Medical Economics, interviewed and quoted by author, Kristie Perry)

"Professional Practice Sales" (November 2, 1994, sponsored by Physicians' Organization of Western Michigan, Grand Rapids, Michigan)

"Grabbing the Bandwagon of Change" (October 24, 1994, Medical Economics, interviewed and quoted by author, Ken Terry)

"PHOs: Castles in the Sand?" (October 24, 1994, Medical Economics, interviewed and quoted by author, David Azevedo)

"The Formation of a Physician Hospital Organization (PHO)" (September 27, 1994, National Managed Health Care Congress Northeast Conference, New York, New York)

"Look Who's Guarding the Gate to Specialty Care" (August 22, 1994, Medical Economics, interviewed and quoted by author, Ken Terry)

"Merging - Aligning, Networking and Group Practice Development" (May 11, 1994, sponsored by Physicians' Organization of Western Michigan, Grand Rapids, Michigan)

"Management Mantras" (May 5, 1994, Employed Physician Administrator Network Conference sponsored by Mercy Health Services)

"Got the Urge to Merge? You're Not Alone" (April 11, 1994, Medical Economics, interviewed and quoted by author, Anita J. Slomski)

"How Much of Your Goodwill Has Evaporated?" (October 25, 1993, Medical Economics, interviewed and quoted by author, Ken Terry)

"Contract Management Services" (May 15, 1993, The PM Group Executives Conference, Palm Springs, California)

"Hospital Contracting Opportunities" (May 14, 1993, The PM Group Executives Conference, Palm Springs, California)

"The Excimer Laser: Preparing Yourself and Your Practice for This Exceptional Opportunity" (May 9, 1993, American Society of Cataract and Refractive Surgery, Seattle, Washington)

"The MSO Approach to Medical Staff Integration" (March 14-17, 1993, Academy for Health Services Marketing 13th Annual Symposium, Buena Vista, Florida)

"Managing Physicians as Employees" (October 14, 1992, Healthcare Financial Management Association's 39th Annual Conference, Ypsilanti, Michigan)

"Action Plan for Hospitals: RBRVS as a Growth Opportunity" (April 27-28, 1992, Washington, D.C.; April 30-May 1, 1992, Dallas, Texas; sponsored by Health Care Competition Week)

"Practice Development Strategies for the 90's" (March 14-15, 1992, Spring Update in Primary Care, Grand Rapids, Michigan; February 7-9, 1992, Metropolitan Ophthalmology Resident's Educational Program, Shanty Creek, Michigan)

"Financial Implications of RBRVS" (December, 1991, American Marketing Association, Chicago, Illinois)

"Quality: Job 1. And More Than Its Own Reward" (April 6, 1991, Outpatient Ophthalmic Surgery Society, Boston, Massachusetts)

"Bottom Line, Quality and Competition Issues Answered" (April 7, 1991, Society of Geriatric Ophthalmology, Boston, Massachusetts)

"Participate in Medicare? For '91, there's more incentive" (November 26, 1990, Medical Economics, interviewed and quoted by author, David Azevedo)

"Practice Expenses Take the Leap of the Decade" (November 12, 1990, Medical Economics, interviewed and quoted by author, Mark Holoweiko)

"Harmony or Havoc - Physician/Hospital Integration" (November 2, 1990, Lakewood Group, Ltd., Madison, Wisconsin)

"Can You Make Your Income-Division Formula Work Better?" (August 20, 1990, Medical Economics, interviewed and quoted by author, David Azevedo)

"Health Systems Acquisition and Management of Physician Practices: Joint Venturing the Ultimate Hospital-Doctor Partnership" (May 1990, Medical Staff Affairs Symposium, San Diego, California)

"New York State HMO/PPO Status and General Discussion of Contracting Issues" (March 24, 1990, Second New York State Free Standing Ambulatory Surgery Center Conference, LaGuardia, New York)

"Outpatient Surgery - One Woman's Experience" (January 1990, Seniors Today, Rockland County, New York)

"The Nuts and Bolts of Merger and Acquisition in Practice Development" (November 18, 1989, Advanced Practice Enhancement, Chicago, Illinois)

"The New Technologies that Expand Patient Volume and Practice Income" (November 17, 1989, Advanced Practice Enhancement, Chicago, Illinois)

"Outpatient Surgery--Fast, Inexpensive, Convenient" (July 1989, Seniors Today, Rockland County, New York)

"What Hospitals Will Give To Take Over Your Practice" (May 11, 1987, Medical Economics, interviewed and quoted by author, Mark Holoweiko)

"The Integration of Physicians and Their Practices into the Total Healthcare System" (February 1987, The 30th Congress on Administration, The Foundation of the American College of Healthcare Executives, Chicago, Illinois)

"Contracting for the Sub-Specialist" (March 1987, Loptex Annual Winter Conference on Issues in Ophthalmology, Salt Lake City, Utah)

"The Future of Optometric-Ophthalmological Networks" (January 1987, The American Optometric Association Board Retreat, Keystone, Colorado)

"Physician Practice Acquisition - Analysis, Execution and Follow-Through" (March 1986, The National Health Care Marketing Symposium, San Francisco, California)

"Cost Effective Programs to Identify and Support Key Physician Practices - New Uses for Leftover Resources" (March 1986, The National Health Care Marketing Symposium, San Francisco, California)

"The Development of a Market Based Business Plan - Criteria and Components" (February 1986, Rush Presbyterian; Winter 1986, St. Luke's Colloquium on Health Care Marketing)

"The Future of Vision Care - A 20/20 Perspective For Ophthalmologists" (February 1986, Ioptex Annual Winter Conference on Issues In Ophthalmology, Vail, Colorado)

"Future Trends in Health Care - When Long Range Planning Means Ninety Days" (November 1986, Nebraska Hospital Association, Omaha, Nebraska)

"HMO Strategies for Hospital Employee Populations: The Consolidated Income Approach" (December 1985, The University of Chicago Graduate School of Business, Workshop in Healthcare Administration Studies)

"Enhancing Hospital Physician Relationships Through Real Estate Ventures...Innovative Use of Equity Partnerships, Syndication, and Lease Arrangements" (February 1985, The National Healthcare Marketing Symposium, Kansas City, Missouri)

"Public Relations and Its Impact Upon EMS," Audio/Video presentation delivered to various national EMS public forums:

HEW Public Information and Education Seminar, New York, New York (1978)  
HEW Tri-Regional EMS Seminar, Las Vegas, Nevada (1978)  
HEW National Research in EMS Seminar, Washington, D.C. (1979)  
Michigan Emergency Medical Service Symposium, Lansing, Michigan (1979)  
Ohio Statewide EMS Association Annual Meeting (1979)

"The Lifesaver Course," Kalamazoo County American Red Cross Citizen Training Program (1978, Text and Instructor Materials)

"Communication Plan for Southwest Michigan To Determine and Enhance Attitudes Toward Public Safety" (1977, Upjohn Foundation and Kellogg Foundation)

### Grants

"Initiation of an Emergency Medical Service System for Southwest Michigan" (Granted July 1978 - \$425,000) Program Expansion (granted July 1979 - \$375,000)

"Expansion and Improvement of an EMS System for Southwest Michigan" (Granted July 1977, \$147,000 - Continuation Grant, July 1978, \$86,000)

"Borgess Medical Center Child Restraint Program Development Evaluation" (Initiation grant 1979, \$18,737 - Continuation Grants 1980, \$19,954; 1981, \$23,600; 1982, \$16,052)

"Kalamazoo County (Kalamazoo Foundation and Upjohn Foundation) Pre-hospital Care Project" (Initiation grant 1977, \$75,000 -Continuation Grants 1978, \$75,000; 1979, \$50,000)

"KVC Training Grant Off Campus/On Campus Experience-based Education" (Granted 1976, \$18,000)