AOPO

FALL FUSION

SEPTEMBER 16-18, 2019







Financial Management Council

9:00 AM – 11:00 AM Portofino	Mentor Support Everything you Wanted to Know about OPO Finance
	This will be a completely audience driven session where several seasoned AOPO Finance professionals will be available to help you with any questions. Please come with your questions or just to listen to the answers. We would like all the newer members to attend but we also encourage all FMC member to join!
	Facilitators: Joe Weber, CFO – Center for Organ Recovery & Education (CORE) Marilou Donley, Sr. VP & COO – Texas Organ Sharing Alliance (TOSA) Dara Washburn, Sr. VP & CFO – New England Donor Services (NEDS)

Plenary Session | QI, IT, ET, HR, FM

1:00 PM - 1:15 PM International Ballroom	Welcome to San Diego!
	Lisa Stocks, Executive Director – Lifesharing
1:15 PM – 1:30 PM International Ballroom	A Message From the President
	Kelly Ranum, CEO – Louisiana Organ Procurement Agency
1:30 PM – 2:30 PM International Ballroom	Mindset Shift The New Secret to Success
	"I'm not that smart" "I don't have a creative bone in my body", "He's stuck in his ways", "You can't teach an old dog new tricks". Sound familiar? Stanford Professor and leading mindset researcher, Carol Dweck has argued that there are two kinds of people in this world: those who have fixed mindsets and those who have growth mindsets. In this interactive presentation, you will learn the difference between the two, discover which side you lean towards and gain valuable tips for uncovering the blocks to your work/life success!
	Diane Bickford, President – Trivantage Development
	Facilitator: Chris Duckett, Director, Human Resources – Center for Organ Recovery & Education (CORE)

2:30 PM – 3:00 PM International Ballroom	Connect to Purpose
	Kelly Abbott, Donor Father
	Facilitator: Lisa Stocks, Executive Director – Lifesharing
3:00 PM – 3:15 PM <i>Foyer</i>	Break
3:15 PM – 3:45 PM International Ballroom	Updates from the UNOS Data Committee
	Heather Hickland, Director, Quality & Regulatory Compliance - LiveOn Nebraska
3:45 PM – 4:45 PM International Ballroom	Shaping the Future Current Events & Legislative Brief
	Hear from AOPO Legislative & Regulatory Affairs Committee (LRAC) Members and OPO Leaders on current events and legislation impacting the donation and transplantation community. Let's stay connected and informed!
	Joe Roth, President & CEO – NJ Sharing Network Lori Brigham, CEO & President – Washington Regional Transplant Community (WRTC)
	Kelly Ranum, CEO – Louisiana Organ Procurement Agency (LOPA)
	Facilitator: Elling Eidbo, CEO – AOPO
4:45 PM – 5:00 PM International Ballroom	Next Up
	Facilitators: Jenny Miller, Program Manager – AOPO Jennifer Jenks, Program Manager – AOPO
5:00 PM	Adjourn
5:30 PM – 7:00 PM Bayside Terrace	Networking Reception
,	Join the Fall Fusion attendees at Bayside Terrace – Hilton San Diego Resort & Spa for a networking reception with drinks and apps. The event is sponsored by AOPO member and local OPO, Lifesharing.
	LIFESHARING™

Financial Management Council

7:00 PM - 8:30 PM	FMC Dinner
Garden by the Bay,	
Private Event	*The FMC Dinner is a private event for the AOPO Financial Management Council members only. Guests must register in advance as there is a \$100 fee to attend. Please wear name badges as attendees will be checked at the door.



Education and Training Council

7:00 AM – 8:00 AM Pavilion	Breakfast
8:00 AM – 8:30 AM Portofino	Welcome & Introductions
	Facilitator: Brett Kesselring, Clinical Liaison – Gift of Hope (Chair)
8:45 AM – 10:00 AM	What is Microlearning
Portofino	Random Day in November
	Facilitator: Clint Brown, Manager, Training & Development – DonorConnect (Vice-Chair)
	Workgroup Facilitators: Matt Bailey, Jessica Cortez, Lacey Deloera, Lisa Kula, & Pam Moss
10:00 AM – 10:15 AM Foyer	Break
10:15 AM – 11:00 AM	Needs Analysis
Portofino	Backwards Design
	Facilitator: Clint Brown, Manager, Training & Development – DonorConnect (Vice-Chair)
	Workgroup Facilitators: Matt Bailey, Jessica Cortez, Lacey Deloera, Lisa Kula, & Pam Moss
11:00 AM – 12:00 PM	Outlines
Portofino	Differentiation
	Facilitator: Clint Brown, Manager, Training & Development – DonorConnect (Vice-Chair)
	Workgroup Facilitators: Matt Bailey, Jessica Cortez, Lacey Deloera, Lisa Kula, & Pam Moss
12:00 PM – 1:00 PM Garden by the Bay	Lunch
1:00 PM – 1:30 PM	Council Initiatives
Portofino	
	Facilitator: Brett Kesselring, Clinical Liaison – Gift of Hope (Chair)
1:30 PM – 2:30 PM	ADA and Other Training Considerations
Portofino	
	Facilitator: Clint Brown, Manager, Training & Development – DonorConnect (Vice-Chair) Workgroup Facilitators: Matt Bailey, Jessica Cortez, Lacey Deloera, Lisa Kula, & Pam Moss

2:30 PM – 3:00 PM	Delivery Methods
Portofino	Course Building
	Facilitator: Clint Brown, Manager, Training & Development – DonorConnect (Vice-Chair)
	Workgroup Facilitators: Matt Bailey, Jessica Cortez, Lacey Deloera, Lisa Kula, & Pam Moss
3:00 PM – 3:15 PM <i>Foyer</i>	Break
3:15 PM – 3:45 PM	Delivery Methods (continued)
Portofino	Refining Courses
	Facilitator: Clint Brown, Manager, Training & Development – DonorConnect (Vice-Chair)
	Workgroup Facilitators: Matt Bailey, Jessica Cortez, Lacey Deloera, Lisa Kula, & Pam Moss
3:45PM – 5:00 PM	Presenting Training (5-7 minutes per group)
Portofino	
	Facilitator: Brett Kesselring, Clinical Liaison – Gift of Hope (Chair)
5:00 PM	Adjourn

Financial Management Council

7:00 AM – 8:00 AM	Breakfast
Pavilion	
8:00 AM – 8:15 AM	Welcome FMC!
Sorrento-San Marino	
	Christi Steinberg, Director, Finance – Indiana Donor Network (Chair)
	Jason Mahfood, CFO – Nevada Donor Network (Vice-Chair)
8:15 AM – 9:00 AM	Legislation Impact on Financial Management
Sorrento-San Marino,	
Closed Session	Joe Ferreira, President & CEO – Nevada Donor Network
	Facilitates Christi Stainhaus Director Figures Louise Dagge Natural (Chair)
	Facilitator: Christi Steinberg, Director, Finance – Indiana Donor Network (Chair)
9:00 AM – 10:00 AM	Illuminating the Road Ahead
Sorrento-San Marino	
	Financial reporting perspectives and successfully navigating a business transaction.
	Steve Draxler, Partner – RSM
	Brooke Wangsness, Director – RSM
	Facilitator: Jason Mahfood, CFO – Nevada Donor Network (Vice Chair)
	i aciiitatoi. Jasoni Mainoou, CFO – Nevada Donoi Network (Vice Chair)
10:00 AM – 10:15 AM	Break
Foyer	

10:15 AM – 11:00 AM	FMC Open Forum
Sorrento-San Marino, Closed Session	Christi Steinberg, Director, Finance – Indiana Donor Network (Chair) Jason Mahfood, CFO – Nevada Donor Network (Vice-Chair)
11:00 AM – 12:00 PM Sorrento-San Marino,	Medicare Intermediary Updates
Closed Session	John Stiles, Audit – Palmetto GBA
	Barbara Campbell, Reimbursement/Rates – Palmetto GBA
	Facilitator: Marilou Donley, Sr. VP & COO – Texas Organ Sharing Alliance (TOSA)
12:00 PM - 1:00 PM Garden by the Bay	Lunch
1:00 PM — 2:00 PM Sorrento-San Marino	Bond Financing
Softento-Sun Munito	Cam Walker, Principal, American Public Development – Citigroup Archie Chandrasekhar, Director, Not-for-Profit Institutions, Higher Education & Health Care - Citigroup
	Facilitator: Jason Mahfood, CFO – Nevada Donor Network (Vice Chair)
2:00 PM - 3:30 PM Sorrento-San Marino, Closed Session	Center for Life OPO Recovery Center Management Jennifer Milton, University Transplant Center, San Antonio Joe Nespral, President & CEO – Texas Organ Sharing Alliance (TOSA)
	Facilitator: Marilou Donley, Sr. VP & COO – Texas Organ Sharing Alliance (TOSA)
3:30 PM – 3:45 PM Foyer	Break
3:45 PM – 4:45 PM	Tissue Processors
Sorrento-San Marino, Closed Session	The following session will discuss current and future trends including emerging technologies and the regulatory landscape, and how this all affects tissue donors and recovery reimbursement.
	George Herrera, Vice President, Donor Services – MTF Biologics Tom Buersmeyer, Vice President, Partner Relations – LifeNet Health
	Facilitator: Dara Washburn, Sr. VP & CFO – New England Donor Services (NEDS)
4:45 PM – 5:00 PM Sorrento-San Marino,	FMC Annual Business Meeting
Closed Session	Christi Steinberg, Director, Finance – Indiana Donor Network (Chair) Jason Mahfood, CFO – Nevada Donor Network (Vice-Chair)
5:00 PM	Adjourn

Human Resources Council

7:00 AM – 8:00 AM	Breakfast
8:00 AM – 8:30 AM St. Tropez	Welcome to the Human Resources Council!
	Facilitators: Chris Duckett, Director, Human Resources – CORE (Chair) Michelle Gibson, Vice President, Human Resources – LifeShare of Oklahoma (Vice Chair) Sara Levinson, Director of Human Resources – Nevada Donor Network
8:30 AM – 9:00 AM St. Tropez,	HR Council Business Meeting
Closed Session	Chris Duckett, Director, Human Resources – CORE (Chair) Michelle Gibson, Vice President, Human Resources – LifeShare of Oklahoma (Vice Chair)
9:00 AM – 10:00 AM St. Tropez	Shifting the Shift Transitioning to New Staff Scheduling Models
	Management and benefits of making a shift to a new model.
	24 Hour to 12 Hour Sara Levinson, Director of Human Resources – Nevada Donor Network Darren Lahrman, Organ Services Director – Nevada Donor Network
	Facilitator: Chris Duckett, Director, Human Resources – CORE (Chair)
10:00 AM – 10:15 AM Foyer	Break
10:15 AM – 11:00 AM St. Tropez	Apps & Technology That Make Your Life Easier
	Attendees will share one app or technology that has helped them lead a more organized/efficient life.
	Simple Change Cindy Hanson, Director of Human Resources – Carolina Donor Services
	Paycom App Michelle Gibson, Vice President, Human Resources – LifeShare of Oklahoma (Vice Chair)
	Facilitator: Michelle Gibson, Vice President, Human Resources – LifeShare of Oklahoma (Vice Chair)
11:00 AM – 12:00 PM St. Tropez	The Talent Equation
	Talent Plus shares 30+ years of best practices and research to share tangible methods to identify, retain and develop top talent.
	Jessica Reiser, Healthcare Talent Consultant – Talent Plus, Inc. Dr. Scott Whiteford, Director of Leadership Development & Analytics – Talent Plus, Inc.
	Facilitator: Ali Erickson, Sr. Vice President, Human Resources & Administration – NEDS

12:00 PM – 1:00 PM	Lunch
Garden by the Bay	
1:00 PM - 2:00 PM	Left, Right, High, Low which HR practices are good to go?
St. Tropez,	
Closed Session	Whether it involves legalized marijuana, staunch political beliefs, or the "problem generation," many topics that arise in the workplace can create strife among employees. Learn what policies and procedures your organization can develop to handle today's dynamic workplace environment. This segment also will include a detailed discussion of the current status of medical cannabis law and their intersection with the workplace.
	Douglas P. Smurr, Of Counsel – Gordon & Rees
	Craig W. Snethen, Partner – Gordon & Rees
	Facilitator: Chris Duckett, Director, Human Resources – CORE (Chair)
2:00 PM – 3:00 PM	Human Resources Lightning Talks
St. Tropez,	Human Resources Eightning Talks
Closed Session	During the following session, attendees will share an innovative idea or new process they have
	implemented at their organization in one of the following categories – (1) Benefit Offerings, (2) Interview
	Methods, (3) Employee Engagement, (4) Training and Development.
	Facilitator: Kim Ringham, Director, Human Resources – Indiana Donor Network
3:00 PM – 3:15 PM	Break
Foyer	
3:15 PM – 4:00 PM	Supporting Strategic Planning via HR Data & Metrics
St. Tropez, Closed Session	During Mantuniana; Chief Information Officer CODE
Closed Session	Bruno Mastroianni, Chief Information Officer – CORE
	Capability & Capacity Planning
	Chris Duckett, Director, Human Resources – CORE (Chair)
	Facilitator: Chris Duckett, Director, Human Resources – CORE (Chair)
4:00 PM – 5:00 PM	EE01 Reporting for 2017-18 – Help! I'm Lost.
St. Tropez,	
Closed Session	Facilitator: David Staley, Vice President of Human Resources – LifeGift (Past Chair)
5:00 PM	Adjourn

Information Technology Council

7:00 AM – 8:00 AM	Breakfast
Pavilion	
8:00 AM – 8:15 AM	Welcome to San Diego!
Monte Carlo	
	Matt Moss, Chair, SVP & CIO - New England Donor Services
	Jason Narverud, Vice Chair, Information Services Manager - LifeSource

8:15 AM – 9:15 AM <i>Monte Carlo</i>	20/20 Vision: Seeing and Collaborating in the Future
	Matt Moss, SVP & CIO - New England Donor Services Jason Narverud, Information Services Manager - LifeSource
	Bruno Mastroianni, Chief Information Officer - Center for Organ Recovery & Education
	Paul Hetzel, Director of Information Systems - Carolina Donor Services
	Mark White, Chief Information Officer - Mid-America Transplant
9:15 AM – 10:00 AM <i>Monte Carlo</i>	Adoption Model Group Activity
	Matt Moss, SVP & CIO - New England Donor Services
10:00 AM – 10:15 AM	Break
Foyer	Break .
10:15 AM – 10:50 AM Monte Carlo	Developing Your Own Integration Roadmap
Wionte Cario	Matt Moss, SVP & CIO - New England Donor Services
10:50 AM – 11:20 AM	Aligning our Apps – OPO Wide Application Portfolio
Monte Carlo	
	Jessica Langlois, Sr. Systems Analyst - New England Donor Services
11:20 AM – 11:40 AM Monte Carlo	Thinking Wave Length – What is work Sweet Spot?
Wonte Cario	Jason Narverud, Information Services Manager - LifeSource
11:40 AM – 12:00 PM	Let's Make a "Group Purchasing" Deal: Opportunities with Secure Texting, Information
Monte Carlo	Security and Phish Training
	Jason Narverud, Information Services Manage - LifeSource
12:00 PM - 1:00 PM	Lunch
Garden by the Bay	
1:00 PM - 1:20 PM <i>Monte Carlo</i>	Data Council Report Out New CMS Metric and Preview of the Data Council Meeting
Wonte Cano	New Civis Metric and Preview of the Data Council Meeting
	Steve Selby, Director of Information Systems -Donor Alliance
1:20 PM – 1:40 PM Monte Carlo	Real-Time OTE
Wonte Carlo	A. Jay Brock, Senior ETL Developer - LifeSource
1:40 PM - 2:00 PM Monte Carlo	It's a Wonderful World of New CMS Data Tools
Worke Carlo	Jacob Young, Business Intelligence Analyst - DonorConnect
2:00 PM – 2:20 PM	Leveraging Salesforce at DAH
Monte Carlo	Scott Whiteley, Director of Information Technology - Donor Network of Arizona

2:20 PM – 2:40 PM Monte Carlo	How to Deploy Cloud Based InfoSec Tools
	Dave Hoss, Support Systems Specialist - Center for Organ Recovery & Education
2:40 PM – 3:00 PM <i>Monte Carlo</i>	Drilling Down and Doubling Down – Interactive Business Systems
	Ed Horne, System Analyst - Center for Organ Recovery & Education
3:00 PM – 3:15 PM <i>Foyer</i>	BREAK
3:15 PM – 3:35 PM <i>Monte Carlo</i>	Managing Millennials in the 21 st Century/Platform as a Service
	Mark White, Chief Information Officer - Mid-America Transplant
3:35 PM – 3:55 PM Monte Carlo	Desperately Seeking "Buy In" – Deploying New Infrastructure
	Paul Hetzel, Director of Information Systems - Carolina Donor Services
3:55 PM – 4:15 PM <i>Monte Carlo</i>	ITIL Overview with a PMO Oriented Use Case
	Edward Marchewka, Director, Information & Technology Services - Gift of Hope
4:15 PM – 4:35 PM <i>Monte Carlo</i>	ITIL is on the Menu- An A La Carte Deployment
	Steve Selby, Director of Information Systems - Donor Alliance
4:35 PM – 4:50 PM Monte Carlo	Announcing the Inaugural Technology Leadership Award and Technology Guru Award
	Matt Moss, SVP & CIO - New England Donor Services
	Jason Narverud, Information Services Manager - LifeSource
4:50 PM – 5:00 PM Monte Carlo	Closing Comments and Reviewing Initiatives
	Matt Moss, SVP & CIO - New England Donor Services
	Jason Narverud, Information Services Manager - LifeSource
5:00 PM	Adjourn

Quality Improvement Council

7:00 AM – 8:00 AM	Breakfast
Pavilion	
8:00 AM – 8:10 AM	Welcome to the Quality Improvement Council!
Capri-Riviera	
	Becky Smith, Chair, Director of Innovation and Quality, Legacy of Hope
	Cheyne Levermore, Vice-Chair, Director, OPO Quality Systems, LifeNet Health

8:10 AM – 10:00 AM	Building and Growing Strong Relationships with Your Transplant Centers
Capri-Riviera	Benefits of a shared scorecard between Transplant Centers and OPOs
	Rule in and rule out criteria and preset criteria
	Integrating orientation programs between Transplant Centers and OPOs
	How to enter SRTR data and refusal codes
	Jennifer Milton, BSN, MBA, Clinical Assistant Professor - University Transplant Center
	Kasper Statz, Quality Systems Manager - OurLegacy
10:00 AM – 10:15 AM	Break
Foyer	
10:15 AM – 11:00 AM Capri-Riviera	How does your OPO conduct QAPI Meetings?
	Becky Smith, Director of Innovation and Quality - Legacy of Hope
	Kasper Statz, Quality Systems Manager - OurLegacy Nicole Berry, Manager, OPO Quality System - LifeNet Health
	Nicole Berry, Manager, OPO Quanty System - LifeNet Health
11:00 AM – 12:00 PM <i>Capri-Riviera</i> ,	Safe Table Discussion
Closed Session	Lorraine Kemp, Director Quality Systems - We Are Sharing Hope SC
	Dr. Hagan, Patient Safety Officer - Gift of Life Michigan
12:00 PM – 1:00 PM Garden by the Bay	Lunch
1:00 PM – 3:00 PM	Regional Work Group Work
Capri-Riviera	negional tronk croup tronk
•	Regional Work Group Leads
3:00 PM – 3:15 PM Foyer	Break
3:15 PM – 4:00 PM	Methodology for creating an annual audit schedule
Capri-Riviera	Standardizing audit tools
	Kitt Hugger, Compliance Officer - Louisiana Organ Procurement Agency
4:00 PM – 4:45 PM Capri-Riviera	Challenges with HIPAA
capit timera	Birth Tissue Recovery
	Heather Hickland, Director & Quality Compliance - Live On Nebraska
	Research Authorization and Consent Forms
	Cheyne Levermore, Director, OPO Quality Systems - LifeNet Health
4:45 PM – 5:00 PM	Quality Improvement Award Announcement
Capri-Riviera	Squarey improvement Audia Announcement
•	Becky Smith, Chair, Director of Innovation and Quality - Legacy of Hope
	Cheyne Levermore, Vice-Chair, Director, OPO Quality Systems - LifeNet Health
5:00 PM	Adjourn



Plenary Session | QI, IT, ET, HR, FM

7:30 AM – 8:30 AM Bayside Terrace	Breakfast
8:30 AM – 11:30 AM International Ballroom	Dare to Lead Brave Work. Tough Conversations. Whole Hearts. Based on the #1 New York Times Best Selling Book by author and researcher Dr. Brene Brown, this learning workshop is the ultimate playbook for developing brave leaders and courageous cultures. When we dare to lead, we don't pretend to have the right answers; we stay curious and ask the right questions. We don't see power as infinite and hoard it; we know that power becomes infinite when we share it with others. We don't avoid difficult conversations and situations; we lean into vulnerability when it's necessary to do good work. Join us if you dare!
	Leah M. Brown , Speaker, Author, Certified Dare to Lead Facilitator Facilitator: Clint Brown, Manager, Training and Development – DonorConnect
11:30 AM	Adjourn