

Day 1 Agenda

THURSDAY, JUNE 5

03:30 PM

EVENT REGISTRATION

PARLOR - MAIN LEVEL

REGISTRATION WILL REMAIN OPEN UNTIL 8PM

04:30 PM

NETWORKING SOCIAL

GARDEN ROOM - MAIN LEVEL

05:30 PM

DINNER SERVED

GARDEN ROOM - MAIN LEVEL

06:00 PM

WELCOME & LEGISLATIVE AWARDS

GARDEN ROOM - MAIN LEVEL

07:00 PM

OPENING KEYNOTE - INVESTING IN TOMORROW: PREPARING HEALTH CENTERS FOR THE VALUE-BASED FUTURE

ANDREW PRINCIPE, STARLING ADVISORS

GARDEN ROOM - MAIN LEVEL



PROUDLY SERVING UTAH'S COMMUNITY HEALTH CENTERS FOR 40 YEARS

FRIDAY, JUNE 6

Day 2 Agenda AM

NEW BOARD
MEMBER TRACK

FINANCE TRACK

OPERATIONS TRACK

LEADERSHIP TRACK

07:00 AM

REGISTRATION
PARLOR - MAIN LEVEL

08:00 AM

NETWORKING BREAKFAST
GARDEN ROOM - MAIN LEVEL

09:00 AM

INTRODUCTION TO
HEALTH CENTER FINANCES
JAY BOYER & ANN LOEFFLER
FACKTOR HEALTHCARE CONSULTING

ALIGNING FOR IMPACT: BUILDING
STRONGER HEALTH CENTERS
THROUGH A CLINICALLY
INTEGRATED NETWORK
ANDREW PRINCIPLE
STARLING ADVISORS

LAYING THE FOUNDATION FOR
LONG-TERM SUCCESS
MELISSA STRATMAN
COLEMAN ASSOCIATES

RELATIONAL LEADERSHIP:
DEVELOP STAFF TO THEIR
FULL POTENTIAL PART 1
JANE COOPER-DRIVER & KYLE TURNER
RELATIONAL LEADERSHIP PARTNERS

10:15 AM

BREAK

10:30 AM

INTRODUCTION TO THE
HEALTH CENTER PROGRAM:
COMPLIANCE, PERFORMANCE &
PURPOSE
LUKE MALEK & CAITLIN O'BRIEN
SMITH & MALEK

PART 1: LAYING THE GROUNDWORK
FOR SCENARIO PLANNING
JAY BOYER & ANN LOEFFLER
FACKTOR HEALTHCARE CONSULTING

DESIGN IN ACTION: FROM THEORY
TO TRANSFORMATION
MELISSA STRATMAN
COLEMAN ASSOCIATES

RELATIONAL LEADERSHIP:
DEVELOP STAFF TO THEIR FULL
POTENTIAL PART 2
JANE COOPER-DRIVER & KYLE TURNER
RELATIONAL LEADERSHIP PARTNERS

11:45 AM

LUNCH & HEALTH CENTER PROGRAM POLICY UPDATE
COLLEEN MEIMAN, NATIONAL POLICY ADVISOR FOR STATE ASSOCIATIONS OF COMMUNITY HEALTH CENTERS
GARDEN ROOM - MAIN LEVEL



FRIDAY, JUNE 6

Day 2 Agenda PM

NEW BOARD MEMBER TRACK	FINANCE TRACK	OPERATIONS TRACK	CIN PANEL
------------------------	---------------	------------------	-----------

01:30 PM	GOVERNING FOR IMPACT: BOARD ROLES & RESPONSIBILITIES IN HEALTH CENTERS LUKE MALEK & CAITLIN O'BRIEN SMITH & MALEK	PART 2: WORKING THROUGH A SCENARIO PLAN: A CASE STUDY JAY BOYER & ANN LOEFFLER FACKTOR HEALTHCARE CONSULTING	DELIVERING PATIENT-CENTERED SYSTEMS THAT DELIVER MELISSA STRATMAN COLEMAN ASSOCIATES	CLINICAL INTEGRATION IN ACTION: STRATEGIES, STRUGGLES, AND SUCCESSES ANDREW PRINCIPE - STARLING ADVISORS FRANCHELLA JENNETT - EXECUTIVE DIRECTOR, MY TEXAS MY HEALTH PATRICK SALLEE - CEO, VIBRANT HEALTH
02:45 PM	SNACK BREAK			
03:00 PM	CLOSING KEYNOTE: Federally Qualified Health Centers as Catalysts for Making America Healthy Again JANE LUCAS, ALSTON AND BIRD GARDEN ROOM - MAIN LEVEL			
04:00 PM	AWARDS CEREMONY & RAFFLE GIVEAWAY GARDEN ROOM - MAIN LEVEL			

Opening Keynote: Investing in Tomorrow: Preparing Health Centers for the Value-Based Future

Speaker: Andrew Principe, Starling Advisors

Health centers are at a critical crossroads—balancing the demands of today’s fee-for-service environment while preparing for the inevitable shift to value-based reimbursement. This session, led by Andrew, explores the strategic and operational shifts necessary for Health Centers to successfully navigate this transformation.

Key Themes:

- **The Dual Challenge:** Health centers must continue delivering care in a volume-based payment model while investing in capabilities needed for value-based care—such as care coordination, data analytics, and risk management—before full reimbursement is available.
- **Clinically Integrated Networks (CINs):** As proven vehicles for transitioning from volume to value, CINs offer a collaborative, scalable approach to delivering high-quality, cost-effective, patient-centered care. However, they require a fundamentally different business model and mindset than fee-for-service reimbursement.
- **Strategic Imperatives:** Success in a value-based environment belongs to organizations that can improve quality and reduce costs—demonstrating clear value in a competitive marketplace. This demands a shift from a “patients in waiting rooms” model to proactive population health management.
- **Leadership Commitment:** Organizational transformation takes time, intentional investment, and most importantly—commitment. Health center leaders must decide whether they are ready to lead change or risk being left behind.

Key Takeaways:

- Transitioning to value-based care is not an overnight shift—it’s an evolutionary process.
- Early investments in CIN infrastructure, data systems, and clinical integration pay dividends as reimbursement models evolve.
- Leadership engagement is essential to building sustainable models of coordinated patient-centered care.
- Utah’s CIN journey provides valuable lessons for other health centers preparing for this transition.

Lunch Keynote - Health Center Program Policy Update

Speaker: Colleen Meiman, National Policy Advisor for the State Associations of Community Health Centers

Join Colleen Meiman for a timely update on key policy developments affecting the Health Center Program. This session will unpack recent federal policy changes, legislative trends, and regulatory shifts—and what they mean for your health center’s operations, funding, and strategic direction. Attendees will gain insights into current advocacy priorities, compliance considerations, and opportunities to influence policy at the local and national levels. Whether you’re a health center leader, clinician, or policy advocate, this session will equip you with the knowledge to navigate today’s evolving policy landscape and prepare for what’s ahead.



Closing Keynote: Federally Qualified Health Centers as Catalysts for Making America Healthy Again

Speaker: Jane Lucas, Alston and Bird LLP

Join us for a special fireside chat with Jane Lucas, a respected leader in U.S. health policy, as she explores the Making America Healthy Again agenda and the pivotal role Federally Qualified Health Centers (FQHCs) play in realizing its vision.

This session will focus on the powerful role that FQHCs play in strengthening community health systems, strengthening communities, and delivering results where they matter most. Jane will share her insights on how FQHCs are not just healthcare providers, but catalysts for conservative values—empowering individuals, reinforcing family and community, and ensuring tax dollars are used effectively to improve health outcomes and economic stability.

Key Takeaways:

- How FQHCs are a cornerstone of the Making America Healthy Again policy framework.
- Policy opportunities that support the current Administration's priorities: local control, efficient spending, and strong families
- The role of FQHCs in bridging access gaps in mental health, chronic care, and preventive services
- Proven models for delivering quality, cost-effective care in rural and underserved areas



Introduction to Health Center Finances

Speakers: Jay Boyer and Ann Loeffler, Facktor Healthcare Consulting

Designed specifically for board members of Health Centers who would like to sharpen their skills in interpreting health center financials. This training focuses specifically on the building blocks of the balance sheet and how it provides valuable information on the financial position of the organization. Board members do not need to be finance experts, but they do need to understand the basics to fulfill their fiduciary duties. A well-informed board contributes significantly to a health center's long-term sustainability. Financial reports, including the balance sheet, are critical tools for oversight and accountability.

Key Learning Objectives:

- Understand the core components of a health center's financial structure
- Learn how to read and interpret a balance sheet
- Recognize the board's fiduciary responsibilities
- Gain familiarity with key financial terms and performance indicators

Tools & Resources Provided:

- Sample Balance Sheet with annotated guidance
- "Financial Questions for Board Members" cheat sheet
- Glossary of Common Financial Terms in Healthcare
- Reference guide on health center KPIs



Introduction to the Health Center Program: Compliance, Performance & Purpose

Speakers: Luke Malek and Caitlin O'Brien, Smith & Malek

Designed with new board members in mind—but valuable for new staff as well—this session offers a foundational overview of the Health Center Program. Led by Luke Malek and Caitlin O'Brien of Smith & Malek, the session will cover key program elements including governance, compliance requirements, and strategies for performance improvement. Attendees will gain a solid understanding of how the Health Center Program operates and the essential roles health centers play in delivering community-based care.



Governing for Impact: Board Roles & Responsibilities in Health Centers

Speakers: Luke Malek and Caitlin O'Brien, Smith & Malek

An informed and engaged board is essential to the success of every health center. In this session, Luke Malek and Caitlin O'Brien of Smith & Malek will explore the core roles and responsibilities of health center board members and the principles of strong governance. Attendees will gain a clear understanding of how effective boards contribute to organizational resilience, mission alignment, and strategic adaptability in a rapidly evolving healthcare environment. While designed for new board members, this session also offers valuable insights for staff who support or interact with governance teams.



Aligning for Impact: Building Stronger Health Centers Through a Clinically Integrated Network

Speaker: Andrew Principe, Starling Advisors

As the healthcare system moves steadily away from fee-for-service models and toward value-based care, health centers must prepare for a new way of delivering—and getting paid for—care. Clinically Integrated Networks (CINs) are a key strategy in this transition, offering a framework for collaboration, shared data, and performance-driven care delivery.

In this session, Andrew will explore the critical role CINs play in positioning health centers for success in value-based payment models. He'll walk through the process of clinical integration, examine current value-based payment trends, and outline how networks of health centers can thrive by working together. This session is ideal for leaders looking to understand how CINs can unlock new opportunities for sustainability, quality improvement, and financial performance.



Part 1. Laying the Groundwork for Scenario Planning

Speakers: Jay Boyer and Ann Loeffler, Facktor

Part 1 introduces the foundational elements of financial scenario planning, emphasizing its relevance in navigating economic, regulatory, and operational changes specific to health centers. This session provides a framework and tools to identify key variables that influence financial stability and sustainability.

Key Takeaways:

- **Understanding Market Changes:** Participants learn to identify the primary drivers of change in the current healthcare environment, including changes in federal funding, reimbursement shifts, and workforce challenges.
- **Scenario Planning Frameworks:** An introduction to scenario-based thinking, including best-case, worst-case, and most-likely financial scenarios.
- **Key Metrics & Indicators:** Discussion on which financial indicators health centers should track regularly to remain agile in decision-making.
- **Stakeholder Engagement:** Tips on engaging internal stakeholders—executive teams, finance staff, and board members—in the planning process.



Part 2. Working through a Scenario Plan: A Case Study

Speakers: Jay Boyer and Ann Loeffler, Facktor

Building on the concepts from Part 1, Part 2 will lead the group through a case study of one of the most current potential risks of the time. In the ever-changing landscape, protentional scenarios are evolving just as quickly. We must learn to be nimble and plan through any scenario.

Key Takeaways:

- **Assumption Building:** A scenario plan is only as good as its assumptions. How do we know which assumptions to make?
- **Experiencing how a scenario plan unfolds:** Note how different opinions shape different results.
- **Operationalizing Scenarios:** Translating financial projections into staffing, service line, and program decisions.
- **Communication Best Practices:** How to present scenario outcomes to boards and funders with clarity and confidence.

Laying the Foundation for Long-Term Success

Speaker: Melissa Stratman, Coleman Associates

In this interactive kickoff session, Melissa Stratman of Coleman Associates will guide participants through the essential building blocks of sustainable healthcare operations. Attendees will learn how to evaluate their current organizational design, align infrastructure with patient-centered strategic goals, and uncover hidden inefficiencies. With practical tools and real-world examples, this session lays the groundwork for creating resilient systems that stand the test of time.

Design in Action: From Theory to Transformation

Speaker: Melissa Stratman, Coleman Associates

Taking the concepts from Session 1 into practice, this session focuses on implementing sustainable design strategies within healthcare settings. Through operational redesign and change management strategies, participants will discover how to drive performance improvements and foster greater adaptability. This hands-on session is ideal for leaders looking to move from vision to action.

Designing Patient-Centered Systems that Deliver

Speaker: Melissa Stratman, Coleman Associates

In this forward-thinking session, Melissa Stratman explores how evolving patient expectations and digital innovation are reshaping customer experience in health centers and paving the path for the future workforce. Attendees will leave with new ideas to elevate the patient's journey and strengthen financial sustainability.

Relational Leadership: Develop Staff to their Full Potential

*Speakers: Jane Cooper-Driver and Kyle Turner
Relational Leadership Partners*

LEADERSHIP TRACK

In this engaging two-part interactive series, Jane Cooper-Driver and Kyle Turner of Relational Leadership Partners introduce a powerful approach to leadership grounded in connection, trust, and community. As senior leaders, your influence is critical to unlocking the potential of your team. Through the Relational Leadership framework, you will explore how to foster psychologically safe environments where communication flourishes, trust is built, and staff feel empowered to grow.

- **Session 1:** The first session introduces the core principles of Relational Leadership, emphasizing the leader's role as a mentor who cultivates growth through guidance, feedback, and support. Attendees will engage in reflection, dialogue, and hands-on strategies to begin building cultures of connection where emerging leaders can thrive.
- **Session 2:** Building on insights from Part 1, this session dives deeper into the application of relational leadership practices. Jane and Kyle will share practical ways leaders can continue to support the development of individuals and teams—strengthening collaboration, deepening trust, and enhancing overall team performance.

Takeaways:

- Understand the foundational elements of Relational Leadership
- Learn how to create psychologically safe, high-trust environments
- Explore practical strategies to support emerging leaders
- Foster team cultures that prioritize growth, communication, and connection

session OVERVIEWS

CIN PANEL



Clinical Integration in Action: Strategies, Struggles, and Success

Panelists

Andrew Principe - Starling Advisors

Franchella Jennett - My Texas, My Health

Patrick Sellee - Vibrant Health, Kansas City, MO

Clinically Integrated Networks (CINs) bring together healthcare providers to collaborate on improving patient outcomes, reducing costs, and increasing value in the healthcare marketplace. These networks leverage shared data, coordinated care strategies, and collective bargaining power to thrive in an increasingly value-based environment.

In this interactive panel session, leaders from health centers in Texas, Oklahoma, and Missouri/Wisconsin will share their real-world experiences building and operationalizing CINs. Moderated by Andrew Principe of Starling Advisors, the panel will explore lessons learned, practical steps for getting started, and strategies for sustaining success. This session is ideal for leadership teams exploring collaborative models to strengthen their strategic position in a value-based care landscape.

What You'll Learn:

- How health centers across different states approached the formation of a CIN
- Key challenges and successes in implementing CIN infrastructure
- The role of data sharing and care coordination in demonstrating value
- Insights into payer contracting and network governance



PROUDLY SERVING UTAH'S COMMUNITY HEALTH CENTERS FOR 40 YEARS