

# 2016–2017



# Annual Report

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"Never doubt that a small group of thoughtful, committed citizens can change the world; indeed, it's the only thing that ever has."

**Margaret Mead**

# From Your President & CEO

The American College of Health Care Administrators is alive and well. If I have learned one thing in the short time that I have been on the job, it is that we have a lot of very passionate members. I have had the pleasure of speaking with members by phone, engaging in email conversations, skyping with students, and attending chapter meetings and events around the country. There is a lot of pride in our organization.

Most of my early efforts have focused on planning our Convocation and all indications are that it will be one of the best attended in many years. There is a renewed excitement about ACHCA with our members and partners. We remain the only organization that supports the individual administrator.

Our members work in an increasingly difficult environment. New and onerous regulations, chronic underfunding and the stress of 24/7/365 responsibility can take a toll. ACHCA and our state chapters provide a collegiality that reminds us that we are not alone. We are there for each other and we are there for our younger members and students who are looking for help and inspiration.

In the upcoming year I hope to continue learning all aspects of the organization and the job, renewing relationships and meeting new and longstanding members. The focus for 2018 will be growing membership. Membership can be grown in two ways. One is to work directly with the large employers to promote ACHCA membership and benefits to their administrators. That's my job. The other way is for individual members to recruit more administrators to join. That's your job. Studies have shown that individuals join an organization when they are asked by another member. Please help us by reaching out to those in your area to join ACHCA.

Among many other goals will be to expand some of our wonderful programs such as mentoring and certification and to look for new ways to increase the value of membership.

I thank you all for your help and support in these first few months and I look forward to the upcoming year with renewed optimism about the future of ACHCA.

Collegially,

A handwritten signature in black ink, appearing to read 'Bill McGinley', with a large, stylized circular flourish at the end.

Bill McGinley, CNHA, CAS, CALA, FACHCA

President / CEO

# Who We Are

## Mission, Vision & Values

**Our Mission Statement:** ACHCA is the catalyst for excellence in post-acute and aging services leadership.

**Our Vision:** To be the premier membership organization providing professional leadership and professional development opportunities for post-acute and aging services health care leaders. Dynamic leadership forges post-acute and aging health care services that are desired, meaningful, successful and efficient.

### Professional Values

#### ACHCA:

- Identifies post-acute and aging services leaders
- Recognizes post-acute and aging services leaders
- Supports post-acute and aging services leaders
- Advocates for the role of post-acute and aging services leaders
- Promotes professional excellence among post-acute and aging services leaders

**To accomplish the Mission, ACHCA will pursue strategies to achieve the following Goals:**

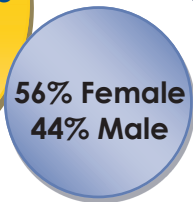
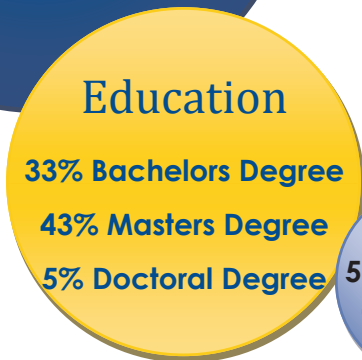
**Goal: REPRESENTATION OF THE PROFESSION:** ACHCA will recruit and retain a diverse membership across the post-acute and aging services continuum.

**Goal: PROFESSIONAL DEVELOPMENT:** ACHCA will provide those within the profession the programs, products, and services required for career advancement and development in support of professional excellence.

**Goal: LEADERSHIP:** ACHCA will align with industry professionals, business partners, and partner organizations to advance the unique health care specialty of post-acute and long term care.

**Goal: PRESENCE:** ACHCA will enhance and promote a positive public perception of the profession and the association to both internal and external audiences.

**GOAL: ORGANIZATIONAL STABILITY:** ACHCA will establish sound business policies, organizational practices, and decision-making processes that support and maintain long-term results based on best practices in association management.



# Highlights

## October 2016 - September 2017

### The Academy

- The Academy provided registration funding for up to xx poster session students at the 2016 Convocation.
- ACHCA co-sponsored the Eighth National Emerging Leadership Summit (NELS) which was held July 2017 in Washington, D.C.
- ACHCA partnered with the National Association of Long Term Care Administrator Boards (NAB) to provide financial support for up to xx NELS participants.
- The Academy Committee and Board Members participated in the Fellow Promise Program resulting in funds appropriated for emerging leadership initiatives.
- The Academy Committee managed the Hollander Scholarship fund and granted scholarships to four young Administrators to attend the 2017 Convocation in St. Louis, MO. They are Sally Awad, Lindsey M. Davis, Trevor Davis and Nicole Ploof.
- The Academy Committee held a successful fundraiser during the 2017 Convocation in St. Louis, MO. Attendees enjoyed networking at a St. Louis Cardinals baseball game while supporting the Academy.

### Awards Program

ACHCA's national recognition and awards program seeks to promote leadership excellence in post-acute and aging services administration, education, journalism, and public service. The 2017 Annual Awards Luncheon provided the Chapter/District Achievement Award to ACHCA Indiana for its Member Retention program that produced an 80% increase, and 11 Individual and Partner awards. Two Champion awards were awarded to the National Association of Long Term Care Administrator Board (NAB) and Connecticut Association of Health Care Facilities, Inc. (CAHCF). Two W. Phillip McConnell scholarships were awarded. The George & Leah Hollander Memorial Scholarship in memory of George and Leah Hollander, the parents of Debra Hollander, LNHA, MBA, a longtime member of ACHCA was introduced. Four recipients received scholarships to attend the Annual ACHCA Convocation & Exposition. Additionally, 30 facility leaders received the Eli Pick Facility Leadership Award at the Convocation for their leadership in achieving top facility performance in their states on ACHCA's identified performance indicators. An additional 137 facility leaders received remote recognition for their achievement and were e-mailed their certificates.

### Education & Conferences

- In fiscal year 2017, ACHCA held two national conferences: the 23rd Annual Winter Marketplace, December 9-11, 2016 at Rio All-Suite Hotel and Casino and the 51st Annual Convocation and Exposition, April 1-5, 2017 at the Hyatt Regency at the Arch, St. Louis.
- The Student Poster Exposition was composed of 8 students presenting 6 research posters.

### Membership & Chapter Relations

In December 2016, the Board approved of three (3) new membership categories: Academic (voting and non-voting), and Business Affiliate. The Academic memberships best serve our members in the field of academia that are not actively serving as administrators. The Business Affiliate Membership is a member option for those seeking to make valuable connections with ACHCA's decision makers and influencers in the post-acute and aging services market without a large upfront marketing dollars investment.

# Highlights

2016-2017 produced the launch of the revamped ACHCA Partnership Program, replacing the branding of the Business Affiliate Packages/Membership categories and renaming the Gold and Silver categories while eliminating the Bronze Affiliate category.

With newly designed membership brochures and welcome mailers, ACHCA focused on the theme of “Be More;” helping new Administrators start their career path to “Be More” with an ACHCA membership. The theme was further incorporated into campaigns as a call to action for retention of lapsed + graced members, and to prospective members, the importance of being more than just an Administrator but a leader of skills and experience prepared to add and demonstrate value within the long-term care and aging services profession.

Chapters were invited to host their Annual meetings at the 2017 Annual Convocation. The outreach goal was not only to engage local chapter members during the annual networking event but to assist chapters with their efforts for recruitment and peer-to-peer communication.

Additionally, the Chapter Leadership Council Forum was launched within the Member Community. The Forum provided a platform for Chapter leaders to network, interact, and share ideas. Chapter leaders were encouraged to leverage the Member Portal to view chapter resources and templates. The ACHC Community deepens the connection between members, grants members access to member-only benefits and services, automates the renewal process, and provides a community for collaboration and knowledge sharing.



# Financials

## Consolidated financial position as of September 30, 2017 compared to prior year

	Sep 30, 17	Sep 30, 16
<b>ASSETS</b>		
<b>Current Assets</b>		
Checking/Savings	174,573	335,107
Accounts Receivable	0	575
Other Current Assets	349,533	278,806
<b>Total Current Assets</b>	524,105	614,488
<b>TOTAL ASSETS</b>	<b>524,105</b>	<b>614,488</b>
<b>LIABILITIES &amp; EQUITY</b>		
<b>Liabilities</b>		
<b>Current Liabilities</b>		
Accounts Payable	10,309	0
Credit Cards	6,301	8,701
Other Current Liabilities	43,439	90,978
<b>Total Current Liabilities</b>	60,049	99,679
<b>Total Liabilities</b>	60,049	99,679
<b>Equity</b>		
Unrestricted Net Assets	257,102	230,753
Board Designated Funds	34,882	43,380
Temp. Restricted Net Assets	207,934	110,856
Perm. Restricted Net Assets	105,245	105,245
Net Income	(141,107)	24,574
<b>Total Equity</b>	464,056	514,809
<b>TOTAL LIABILITIES &amp; EQUITY</b>	<b>524,105</b>	<b>614,488</b>



A copy of ACHCA's full financials may be obtained by emailing a request to [financialservices@achca.org](mailto:financialservices@achca.org).

# Leadership

## 2016 - 2017 Board of Directors



Stefan (Steve) Fromm,  
CNHA, FACHCA  
**CHAIR**  
Georgia



Theresa Sanderson,  
CNHA, FACHCA  
**SECRETARY/TREASURER**  
Connecticut



Robert Lane,  
CNHA, FACHCA  
**VICE CHAIR**  
Oklahoma



Michael Hotz, CNHA,  
FACHCA  
**PAST CHAIR**  
New York

### **ACADEMIC DIRECTOR**

David Wolf, PhD, CNHA, CALA, CAS,  
FACHCA  
Florida

### **DIRECTORS AT-LARGE**

Sharon Colling, CNHA, CALA,  
FACHCA  
Nebraska

Terri Golec, FACHCA  
Connecticut

Philip Jean, CNHA, FACHCA  
Massachusetts

Rudolph (Rudy) L. Michalek, FACHCA  
Florida

Mark Prifogle, FACHCA  
Indiana

Mitch Teller, FACHCA  
New York

### **DISTRICT DIRECTORS**

#### **District 1 Director**

Matt Lessard, CNHA, FACHCA  
Connecticut, Massachusetts, Maine,  
New Hampshire, Rhode Island, Vermont

#### **District 2 Director**

Kathryn Richardson, FACHCA  
New Jersey, New York

#### **District 3 Director**

Cydney Bare, CNHA, FACHCA  
Indiana, Kentucky, Michigan, Ohio,  
West Virginia

#### **District 4 Director**

Michael Barry, CNHA, FACHCA  
Alabama, Florida, Georgia, Maryland,  
DC, Delaware, North Carolina, Pennsylv-  
ania, South Carolina, Virginia

#### **District 5 Director**

Bonnie Wood, CNHA,  
Alaska, Arizona, California, Colorado,  
Hawaii, Idaho, Kansas, Montana, Nebras-  
ka, Nevada, New Mexico, North Dakota,  
Oklahoma,  
Oregon, South Dakota, Utah, Washing-  
ton, Wyoming

#### **District 6 Director**

Doyle Love, CNHA, FACHCA  
Arkansas, Illinois, Iowa, Louisiana,  
Minnesota, Mississippi, Missouri, Tennes-  
see, Texas, Wisconsin

# Chapter Presidents

## Established Chapters

**Arizona Chapter President (D-5)**  
Ed Smith

**Connecticut Chapter President (D-1)**  
Elizabeth Schmeizl, FACHCA

**Florida Chapter President (D-4)**  
Allen Yearick

**Georgia Chapter President (D-4)**  
Carolyn "Jo" Lucke, CNHA, FACHCA

**Indiana Chapter President (D-3)**  
Vivian Wright-Defrees, FACHCA

**Kentucky Chapter President (D-3)**  
Israel Ray, CNHA, FACHCA

**Maine Chapter President (D-1)**  
Jeffrey LaCroix

**Massachusetts Chapter President (D-1)**  
Steve Esdale, CNHA, FACHCA

**Michigan Chapter President (D-3)**  
Alyssa Pischel

**Mississippi Chapter President (D-6)**  
Stacy Seay, FACHCA

**Missouri Chapter President (D-6)**  
Kendall Brune, PhD

**New Jersey Chapter President (D-2)**  
Robert Reyes, CNHA, FACHCA

**New York Chapter President (D-2)**  
Colin Hart, FACHCA

**North Dakota Chapter President (D-5)**  
Jason Weekley

**Ohio Chapter President (D-3)**  
Tara Carr

**Oklahoma Chapter President (D-5)**  
Valerie Bomar

**Pennsylvania Chapter President (D-4)**  
Mary K. Kender

**Rhode Island Chapter President (D-1)**  
Jennifer Romagnolo

**Texas Chapter President (D-6)**  
Linda Mayhugh

**West Virginia Chapter President (D-3)**  
Phillip Donnelly, FACHCA

## Chapters In Development

**New Hampshire (D1)**

**Pennsylvania (D4)**

# Committee Volunteers

## **The Academy of Long Term Care Leadership and Development**

### **Chair: Debra Hollander, Retired FACHCA**

Timothy Dressman, CNHA, CALA, CASP, FACHCA

Michael Barry, CNHA, FACHCA

Timothy Dressman, CNHA, CALA, CASP, FACHCA

Melanie Eaton, CNHA, FACHCA

Brian Forschner, PhD, FACHCA

John Gage, CNHA, CAS, FACHCA

Michael Gore, CNHA, FACHCA

Helaine Ledany, CNHA, FACHCA

Douglas Olson, PhD, FACHCA

Molly Savard

Stacy Seay, FACHCA

Daniel Suer, FACHCA

Bruce Zarett, LNHA

Terri Golec, FACHCA

## **Awards Subcommittee**

### **Chair: Cecily Andrews**

Barbara Acello

Terri Golec, FACHCA

Helaine Ledany, CNHA, FACHCA

Linda Mayhugh

Kathryn McCurley

Charles Shelton Jr., CNHA, FACHCA

David Sones

Daniel Glazer

Steven Smyth, CNHA, FACHCA

## **Business Advisory Council**

Cydney Bare, CNHA, FACHCA (Functional Pathways)

Jodi Dreyer (Omnicare)

Steve Fromm, CNHA, FACHCA (Board Chair)

Mike Hendel (HD Supply)

Dannie Marie (Hunt Conference Group)

JJ Johnson (Cornell Communications)

Robert Lane, CNHA, FACHCA (BKD)

Susan Krall (Senior Rehab Solutions)

Jeff Mukamal

Joe Peixoto (Procure)

Elizabeth Lollis (Staff Liaison)

Justin Schwartz

Cecilia Sepp (President & CEO)

Steve Smyth (NCPC Chair)

Allan Swartz

Elissa Ehrenstein (Staff)

Becky Rowbotham (Hunt Conference Group)

## **Bylaws Committee**

### **Chair: Michael Gore, CNHA, FACHCA**

Susan Farris, FACHCA

Terri Golec, FACHCA

Rudy, Michalek, FACHCA

Roberto Muniz, FACHCA

Anthony Restaino, FACHCA

Kenneth, Reynolds, FACHCA

Mark, Waldrop, CNHA, CAS, FACHCA

## **Education Committee**

### **Chair: Laura More**

Michael Barry, CNHA, FACHCA

Kirstin Dunsworth

Kathy Grimes

Raju Kunnath, DMH

Elizabeth Lollis

Matthew Lessard, CNHA, FACHCA

Theresa Parker, FACHCA

Molly Savard, CNHA, FACHCA

Carolyn Timmer, CNHA

## **Exhibitor-Sponsor Subcommittee**

### **Chair: Tim Layton**

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Heidi Henson

Maureen Kelly

Robert Lane, CNHA, FACHCA

Elizabeth Lollis

JJ Johnson

Justin Schwartz

Allan Swartz

Mitchell Teller, FACHCA

## **Finance Committee**

### **Chair: Theresa Sanderson**

Stefan Fromm, CNHA, FACHCA

Michael Hotz, CNHA, FACHCA

Robert Lane, CNHA, FACHCA

Katie Lynes

Rudy Michalek, FACHCA

## **Mentoring Subcommittee**

### **Chair: James Farley, CNHA, FACHCA**

Michael Barry, CNHA, FACHCA

Timothy Dressman, CNHA, CALA, FACHCA

Ronald England

David Friedler, CNHA Emeritus, FACHCA

Michael Hotz, CNHA, FACHCA

Doug Olson, PhD, FACHCA

Chad Sutcliffe

William Watson, II, FACHCA

David Wolf, PhD, CNHA, CALA, CAS, FACHCA

# Committee Volunteers

## **National Conference Planning Committee**

**Chair: Steve Smyth**

Cecily Andrews  
Stefan, Fromm, CNHA, FACHCA  
Kendall Brune  
Laura More  
Tim Layton  
Heidi Henson  
Robert Lane, CNHA, FACHCA  
Doyle Love, CNHA, FACHCA  
Elizabeth Lollis  
Kathryn, Richardson, FACHCA

Mary Wagner, CNHA, CAS, FACHCA  
Larry Slatky, CNHA, FACHCA  
Mark Finkelstein, CNHA, FACHCA

David Wolf, PhD, CNHA, CALA, CAS,  
FACHCA

## **Professional Advancement Committee**

**Chair: Robert Reyes, CNHA, FACHCA**

Sharon Colling, CNHA, CALA, FACHCA  
Philip Jean, CNHA, FACHCA  
Helaine Ledany  
Matthew Murray  
Jay Stackman  
Steven Smyth, CNHA, FACHCA  
Diana Wilks

## **Student Poster Exposition Workgroup**

**Chair: Theresa Parker, FACHCA**

Donna Alexander  
Robert Burke, PhD  
Mary Helen McSweeney-Feld  
Kevin Hansen  
Heather Kjelstad  
Elizabeth Lollis

## **Nominating Committee**

**Chair: Michael Hotz, CNHA,  
FACHCA**

Richard Gamache, CNHA,  
FACHCA  
Daniel Shields, CNHA, FACHCA  
Margaret



# Donors

We thank our generous supporters for their contributions. All gifts, memorials, and tributes received by ACHCA are gratefully acknowledged.  
*October 1, 2016 - September 30, 2017.*

## **Fellow Promise Keepers**

James L. Farley, CNHA, FACHCA  
Michael A. Hotz, CNHA, FACHCA  
Robert W. Lane, CNHA, FACHCA  
Helaine B. Ledany, CNHA, FACHCA  
Brenda E. Lewis, FACHCA  
Douglas M. Olson, FACHCA  
Bonnie S. Wood, CNHA, FACHCA

## **Academy Donation**

Carriage Healthcare Companies  
Mark J. Finkelstein, CNHA, Fellow Emeritus  
J. S. Parker Jones, FACHCA, Retired Emeritus Certified  
Barbara H. Korpela, FACHCA  
Kathleen A. Pajor, FACHCA

## **Catalyst Fund Donation**

Rudy L. Michalek, FACHCA

## **Donations In Honor Of**

Mark J. Finkelstein, CNHA, Fellow Emeritus

## **Hollander Scholarship Fund Donation**

Debra Hollander

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# Vendor Partners

## Partners

Aegis Therapies  
Arthur J. Gallagher  
Medcom, Inc.  
Mercer Consumer, a service of Mercer Health & Benefits Administration LLC  
QueTech, LLC  
Saint Joseph's College of Maine  
YourMembership

## Partnership program participants:

### **Emerald Level:**

Arete Rehabilitation  
Celtic Consulting  
Koorsen Fire and Security

### **Ruby Level:**

Cornell Communications, Inc.  
Procure LTC Pharmacy

## 2016 Winter Marketplace Sponsors

Carriage Healthcare Companies  
Cornell Communications, Inc  
Direct Supply  
Excel Med  
Senior Rehab Solutions

## 2017 Convocation & Exposition Sponsors

Ability  
Alpine Leadership  
Carriage Healthcare Companies  
Christian Care Communities  
Connecticut Chapter of ACHCA  
Direct Supply  
Duane Morris' Health Law Practice Group  
Encore Rehabilitation

Georgia Chapter of ACHCA  
J Rich Solutions  
Massachusetts Chapter of ACHCA  
McKesson Medical-Surgical  
Missouri Chapter of ACHCA  
New England Alliance  
New Jersey Chapter of ACHCA  
New York Chapter of ACHCA  
Omnicare Pharmacy Services  
PharmScript  
Rhode Island Chapter of ACHCA  
Senior Rehab Solutions  
Siesennop & Sullivan  
UW-Eau Claire Center for Health Administration and Aging Services  
Excellence/CHAASE





**Here today. Here to Stay. ACHCA.**

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