

# HRM CERTIFICATE PROGRAM

## MODULE 2: APPLICATIONS IN HEALTHCARE RISK MANAGEMENT

### FACULTY

#### **GERI AMORI PHD, ARM, CPHRM, DFASHRM, VICE PRESIDENT FOR ACADEMIC AFFAIRS, COVERYS**

Geri Amori is the Vice President for Academic Affairs for Coverys based in Boston, Massachusetts. In that role, Dr. Amori develops, analyzes and coordinates professional development/education programs for healthcare provider organizations, insurers, brokers, associations, and consumer organizations nationally. In addition, she presents, teaches, coaches, and facilitates educational programs about Risk Management and Patient Safety issues. Having taught psychology and communication skills at the graduate and community college level, her area of passion and expertise is in all aspects of human interactive interface. Dr. Amori has served as Vice President for the Education Center of the Risk Management and Patient Safety Institute, Principal of Communicating HealthCare, and as Risk Manager for Fletcher Allen Health Care in Burlington, Vermont. Prior to joining the Risk Management field in 1989, she served as Psychopharmacology Clinic and Research Coordinator with University Associates in Psychiatry at the University of Vermont. Dr. Amori received a Ph.D. in Counselor Education from the University of Florida and an MS in Counseling and Human Systems from Florida State University. She is an active member of the American Society for Healthcare Risk Management (ASHRM) and is a past president of the society. She is the 2004 recipient of the coveted ASHRM Distinguished Service Award and three time recipient of the ASHRM Journal Author Excellence Award. A CPHRM and Distinguished Fellow in the American Society for Healthcare Risk Management, Dr. Amori is also the past president of the Northern New England Society for Healthcare Risk Management. Dr. Amori is the author of the chapter on communicating with patients and families for the 6th edition of the Risk Management Handbook for Healthcare Organizations, as well as publications on Disclosure of Unanticipated Outcomes, Office Practice Risk Management, Communication issues in Root Cause Analysis, and more.

#### **ANN GAFFEY RN, MSN, CPHRM, DFASHRM, PRESIDENT, HEALTHCARE RISK AND SAFETY STRATEGIES**

Ms. Gaffey is President, Healthcare Risk and Safety Strategies. She is an industry-recognized career risk management, quality and patient safety professional with over thirty years of experience in healthcare. Ann has extensive consultative experience, working with hospitals, physician offices and long term care facilities in identifying areas of risk and developing enterprise-wide risk reduction, patient safety and mitigation strategies. Significant accomplishments include the design and implementation of risk and claims management programs in group captive programs. Ms. Gaffey is a frequent speaker on topics related to risk reduction and management strategies in

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healthcare, has authored numerous articles, and co-authored a chapter in the *Risk Management Handbook for Healthcare Organizations, 6<sup>th</sup> edition*.

Ms. Gaffey received her degree from the University of Virginia with a Bachelor of Science in Nursing. She also received her Master of Science in Nursing Leadership and Management from The George Washington University. Ann has achieved the CPHRM and DFASHRM designations. She also serves as Adjunct Faculty at The George Washington University in Washington, DC. Ann is the current President of ASHRM and past-president of VASHRM. She is a member and former Vice Chair of the National Coordinating Council for Medication Error Reporting and Prevention, served on the Advisory Task Force of the National Transitions of Care Coalition, and serves on the Board of the National Perinatal Information Center.

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**LISA L. HAVENS RN, MSN, JD, CPHRM, FASHRM, SENIOR VICE PRESIDENT, LEGAL COUNSEL & SYSTEM RISK OFFICER, BAYLOR SCOTT & WHITE HEALTHCARE**

Lisa Havens is currently Senior Vice President Legal Counsel and System Risk Officer at Baylor Scott & White in Texas. Prior to working at Baylor Scott & White, she was a Partner with Bowmer, Courtney, Burleson, Normand and Moore, an office of Naman, Howell, Smith & Lee primarily practicing in civil litigation defense including medical malpractice and employment law. Lisa received her Juris Doctorate Degree from the Baylor University School of Law in Waco, Texas in 1993. She received her MSN with focus on Clinical Nurse Specialist/Education from the University of Texas at Arlington in 1989 and a BSN from Texas Christian University in 1984. Lisa is an Adjunct Assistant Professor for the Texas A&M University System Health Science Center. In 2011, Lisa received Business Insurance magazine's Risk Manager of the Year Award which was presented at the RIMS (Risk & Insurance Management Society) Annual Conference in Vancouver. Lisa is a frequent presenter on a variety of healthcare risk management and medical legal topics. She is a member of ASHRM (American Society for Health Risk Management) and a faculty member of the ASHRM HRM Modules. She has also achieved designation of Certified Professional in Healthcare Risk Management (CPHRM) and is Board Certified in Health Law by the Texas Board of Legal Specialization

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**HALA Y. HELM, JD, MBA, FASHRM, CHIEF RISK OFFICER, PALO ALTO MEDICAL FOUNDATION**

Hala Helm is currently the Chief Risk Officer for the Palo Alto Foundation Medical Group (PAFMG) where she is responsible for the development and maintenance of the overall risk management program for PAFMG, with the goal of identifying and mitigating risk to the organization. She directs the strategic development and maintenance of the risk financing portfolio for the PAFMG enterprise, manages all claims and litigation involving PAFMG, and serves as an advisor to senior leadership on mitigation of risk. Hala is responsible for the development and coordination of an integrated clinical risk management program, including identification and coordination of clinical loss prevention initiatives and comprehensive loss prevention education programs. She manages the day-to-day operations of Capstone Insurance and facilitates communication and coordination with Capstone's Board of Directors and service providers. Prior to joining PAFMG, Ms. Helm held leadership positions in risk management, corporate compliance, and internal audit at health systems and academic medical centers in Indiana, Michigan, and California. Ms. Helm holds a JD, MBA, and numerous professional healthcare certifications.

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**MIKE MIDGLEY RN, JD, MPH, CPHRM, FASHRM, VICE PRESIDENT HEALTHCARE RISK ENGINEERING, SWISS RE CORPORATE SOLUTIONS \*\***

Mike Midgley has over 25 years of experience in the healthcare industry. He is an experienced healthcare risk manager, nurse, insurance professional and attorney. Mr. Midgley began his clinical experience as a nurse in intensive care and emergency medicine. Mike started his healthcare risk management career with a captive insurance company in New York City, having dedicated risk and claims management consulting responsibilities to a major tertiary care medical center. He then served as a risk manager at academic medical centers in New York City. Mr. Midgley later worked in the field as a risk management consultant with medical malpractice insurance carriers. He is currently the Vice President of Healthcare Risk Engineering for Swiss Re Corporate Solutions in New York City where he provides expertise in risk management and patient safety.

Mr. Midgley is a licensed attorney and is a current member of the New York State Bar Association. Mike earned his Juris Doctor (JD) from Fordham University School of Law. He has a Master of Public Health degree from the University of Medicine and Dentistry of NJ and a Bachelor of Science degree in nursing from Rutgers University School of Nursing. He is a Fellow of the American Society for Healthcare Risk Management (FASHRM) for outstanding achievement and has earned Certified Professional in Healthcare Risk Management (CPHRM) designation.

Mike is the 2017 President of the American Society for Healthcare Risk Management (ASHRM). He serves as an officer for three years 2016-2018. Mike was a Board member of ASHRM 2011-2013. He is a Past President of the Association for Healthcare Risk Management of New York (AHRMNY) where he continues to serve on the Board of Directors. Mike is an active member of the American Health Lawyers Association, American Association of Nurse Attorneys, American Bar Association, NY County Lawyers' Association, American Association of Notaries, American College of Healthcare Executives, Healthcare Leaders of NY and the NJ and FL ASHRM Chapters.

Mr. Midgley is a Clinical Assistant Professor at Stony Brook University School of Health Technology and Management where he teaches *Advanced Practice for Risk and Safety Officers* in the Master of Science in Patient Safety Program. Mike has authored risk management articles, including education modules for the Nursing Spectrum Journal. He routinely provides risk management lectures locally, nationally and for international audiences.

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**FAY A. ROZOVSKY JD, MPH, DFASHRM, PRESIDENT, THE ROZOVSKY GROUP, INC.**

Ms. Rozovsky is President of The Rozovsky Group, Inc. An experienced healthcare risk management consultant and attorney, Ms. Rozovsky works with clients along the continuum of care, providing healthcare professionals, organizations and leadership with practical risk management and patient safety solutions. Ms. Rozovsky has lectured extensively and authored or co-authored over six hundred articles and several books including *Consent to Treatment: A Practical Guide*, Fifth Edition; *Healthcare Credentialing: A Guide to Innovative Practices* (with C.W. Giles and M. Kadzielski), and *Health Care Organizations Risk Management: Forms, Checklists & Guidelines*, 3rd Edition. She is a contributing author to the *Enterprise Risk Management Handbook for Healthcare Facilities*. A summa cum laude graduate of Providence College, Ms. Rozovsky received her J.D. from Boston College Law School and an M.P.H. from the Harvard School of Public Health. Ms. Rozovsky is admitted to the practice of law in Florida and Massachusetts. Fay is a Distinguished Fellow of the American Society for Healthcare Risk Management and a Past President of the Society. In 1998, Fay was awarded the Distinguished Service Award. In 2008, Ms. Rozovsky received an honorary doctor of

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public health degree from Providence College for her work in healthcare risk management, patient safety, and health law. Recently, Fay is an Honorary Member of the International Association for Healthcare Security and Safety (IAHSS) for her work in furthering the healthcare safety and security profession. Fay is the Chair of the Enterprise Risk Management Task Force of the American Health Lawyers Association.

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**THERESA M. ZIMMERMAN RN, JD, ARM, CPHRM, DFASHRM, PRINCIPAL, THERESA ZIMMERMAN CONSULTANTS**

Ms. Zimmerman is the principal for Theresa Zimmerman Consultants, LLC; Attorney at Law and Vice President of Risk Management for a medical malpractice insurer. She has over twenty years' experience in healthcare, risk management, mediation, strategic facilitation and law and in various roles as a consultant and operations executive. Terie has been featured at both state and national forums focusing on legal, compliance, patient safety, and consumer relations, leadership and risk management topics. She is known for her ability to work with teams to overcome complex organizational challenges and for her frank and entertaining communication style.

Ms. Zimmerman was 2010 President, American Society of Health Care Risk Management, past president of the Ohio Society of Healthcare Risk Managers and was awarded the 2003 Ohio Risk Manager of the year award. She has been awarded the certificate of recognition and designation of Distinguished Fellow by ASHRM in 2008 and was co-awarded the ASHRM Journal Author Excellence Award in 2007 and 2011. Ms. Zimmerman is a graduate from the Patient Safety Leadership Fellowship Health Forum, Intermountain Advanced Training Program in Health Care Delivery Improvement and the IHI Patient Safety Officer Executive Development Program and has served on Boards of the Society for Ohio Healthcare Attorneys, the Ohio Patient Safety Institute and others.