

BOARD PROFILE



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FINANCIAL EXPERT | OPERATIONS | CHIEF EXECUTIVE OFFICER | CHIEF FINANCIAL OFFICER | STRATEGY | HEALTH CARE | HEALTH INSURANCE | BUSINESS TRANSFORMATION | MERGERS & ACQUISITIONS

VALUE-ADDED EXPERIENCE FOR BOARDS

STRATEGY & VISION

- Led the transformation of Montage Health, a \$2 billion integrated delivery system, based upon the long-term implications of a changing industry. Moving the organization from a hospital centered view to one that now includes a health plan, population health company and multi-specialty physician group.
- Led 5-year strategic plan development with annual updates that included executive and board member participation.
- Consolidated regional healthcare market by forming partnership with district healthcare system.
- Oversight of regional physician's strategic planning resulting in creation of an independent physician's association.

FINANCE

- Chief Financial Officer at Montage Health reporting to CEO.
- Finance expert including bond financing, payer contract negotiations, acquisitions and mergers, audits, budgets, and forecasting.
- Executive lead for the board's Audit, Strategy & Finance, and Investment Committees
- Appointed to interim board of Natividad Medical Center to guide the organization through a successful turn-around from an annual loss of \$22 million to \$7 million annual gain within 3 years and facilitating CEO recruitment and transition.

OPERATIONS / OVERSIGHT

- Chief Administrative Officer of Montage Health reporting to CEO. CFO reports to CAO position.
- Launched Aspire Health Plan and led as Chief Executive Officer.
- Oversight for the Montage Health subsidiaries as board member (population health, multi-specialty physician group and health plan).
- Interim CEO during CEO's sabbatical and in the case of unexpected or prolonged CEO absence.
- Ohana, a new adolescent behavioral health program, advisory group member.

BOARD EXPERIENCE

- Montage Health, Ex-Officio non-voting CAO (and prior to that CFO). Reported to board at each of the six meetings per year. Executive lead of Audit, Strategy & Finance, and Investment Committees.
- Aspire Health – Board Member | Chief Executive Officer
- Monterey Peninsula Surgery Center - Board Member | Finance Committee
- Montage Medical Group - A health-system owned 60+ physician multi-specialty physician group. Voting Board Member
- Natividad Medical Center – A County hospital system located in Salinas, CA. Member Board of Trustees & Finance Committee
- Healthcare Financial Management Association (HFMA), Northern California | A California trade association. Chapter President | Board Member

- California Hospital Association A state-wide health system trade association. Board Member | Council of Independent Hospitals
- HiDO Health – A start-up company providing prescription adherence device and patient support. Advisor to the company regarding long-range strategic and financial planning and growth.
- Throughout career served on multiple community volunteer and non-profit boards including a credit union, arts organization, women’s center, and astronomy research.

EDUCATION

- Western Illinois University, Bachelor of Science, Accounting
- Golden Gate University, Masters of Business Administration

BOARD EDUCATION

- National Association of Corporate Directors, member. Completed Director Professionalism course.
- 50 50 Women on Boards, 50 Women to Watch Finalist.

CAREER HIGHLIGHTS

Chief Administrative Officer and Chief Financial Officer

MONTAGE HEALTH – Integrated healthcare delivery system including hospital services, multi-specialty physician group, health plan, wellness center and skilled nursing / hospice facility.

- CFO and then CAO (CFO reporting) served as the financial steward of the organization:
 - \$2.2 billion in revenues, \$40 million in net operating income and \$1.8 billion in assets.
 - Investment growth from \$200 million in 1996 to \$1.3 billion by 2022.
- Executive responsible for health plan (CEO), strategic planning, finance, partnerships, mergers & acquisitions, business development and operational responsibilities for all financial services departments including supply chain.
- Managed all payer contracts accounting for top line revenue across the organization.
- Completed 5-year business plan for Ohana as part of advisory group.

Chief Executive Officer

ASPIRE HEALTH PLAN

- Launched Aspire within 18 months of board authorization to include state licensure, CMS bid approval and CMS physician network adequacy requirements.
- Grew to include multiple service lines (Medicare Advantage, self-insured, commercial health maintenance and accountable care) and bringing revenue to \$75 million with 60,000 covered lives within the first 8 years of operation.
- Merged with population health company to align objectives.

Chief Financial Officer

COMMUNITY HOSPITAL OF THE MONTEREY PENINSULA (Later Montage Health)

- Led organizations cost reduction efforts removing 12% of waste from the systems annual budget.
- Fund raising through bond issuance and improved Montage bond rating from A to AA-.
- Purchased majority ownership of surgery center.

Progressive Leadership Roles – CHOMP (now Montage Health) – Monterey, CA ♦ Director of Finance | 1985 – 1996 and prior to that Reimbursement Coordinator | 1981 – 1985