

Group on Business
Affairs
GBA



Tomorrow's Doctors, Tomorrow's Cures®

2024

Principal Business Officers' Meeting

Sponsored by the Group on Business Affairs (GBA)

Sept. 18-20, 2024

Hotel Omni Mont-Royal
Montreal, Canada

Continuing Professional Education (CPE) Credit



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Attendance at all sessions at this meeting will provide 14 hours of Continuing Professional Education credits in the areas of Business Management and Organization. The program level for this meeting is basic. The delivery method is Group-Live. No prerequisites or advance preparation is required. For more information regarding AAMC administrative policies, such as complaints and refunds, please contact Susan Rush at srush@aamc.org.

After completing this course, you will be able to:

- Assess how AI and data can be utilized for operational and administrative efficiencies.
- Consider the financial impact around the support of the workforce and how this may impact university and medical school alignment.
- Identify different funds flow and compensation models and how PBOs are considering funding their missions given the current financial pressures.

Agenda

WEDNESDAY, SEPT. 18

4-6 p.m. Registration and Information

5-6 p.m. Meet and Greet Reception

Join your colleagues for a drink and a snack before you head out to dinner for the evening.

THURSDAY, SEPT. 19

7:30 a.m.-5 p.m. Registration and Information

7:30-8:30 a.m. New PBO Orientation Breakfast

Are you a new PBO? Join your colleagues to learn more about the AAMC and the Group on Business Affairs (GBA), hear about AAMC resources available to you as a PBO, and connect with other first-time attendees. The presentation will begin at 7:45 a.m.

7:30-8:30 a.m. General Breakfast

This breakfast is open to everyone.

8:45-9 a.m. Welcome to the PBO Meeting

9-10 a.m. Opening Plenary

Join colleagues from McGill University Faculty of Medicine and Health Sciences as they discuss innovative approaches their institution has implemented through the development and utilization of the Clinical Innovation Platform (CLIP). CLIP supports innovative solutions to unmet clinical needs and accelerates the adoption of technologies into the market and health care system. The platform facilitates access to clinical facilities, expertise, and research labs so companies can validate technologies in a real-care setting. With close proximity to clinics, operating rooms, laboratories, and preclinical facilities, it allows members to network and take full advantage of the resources at the McGill University Health Centre.

Speakers

Jake Barralet, PhD
Scientific Director, CLIP; Alan Thompson Chair in Surgical Research
McGill University Faculty of Medicine and Health Sciences

Gerald Fried, MD, CM, FRCSC, FACS, FCAHS, MSC
Associate Dean, Educational Technology and Innovation; Director,

Steinberg Centre for Simulation and Interactive Learning
McGill University Faculty of Medicine and Health Sciences

10-10:30 a.m.

Networking Break

10:30 a.m.-noon

Innovation Focus Part 1: Technology - Artificial Intelligence

Hear from schools that are currently utilizing AI to address small-, medium-, and large-scale projects in the research, education, and clinical missions. What are the benefits and where are there concerns? Are there cost efficiencies? How does this impact the workforce? What are the potential capabilities and what policies, cybersecurity issues, and guardrails need to be considered? How are schools using AI in operations and administration for financial planning? Peer group discussions will follow the formal presentations.

Speakers

Jill Jemison, MBA
Associate Dean for IT and Chief Information Officer
University of North Carolina at Chapel Hill School of Medicine

Karlina Matthews, MBA
Associate Dean for Administration
University of North Carolina at Chapel Hill School of Medicine

Michael Patriarca, MBA
Vice President, UT Health RGV
Executive Vice Dean, Finance and Administration
University of Texas Rio Grande Valley School of Medicine

Noon-1 p.m.

Lunch

1:15-2:30 p.m.

Innovation Focus Part 2: Operations and People - Managing Medical School-University Relations

This session will be a moderated discussion about managing medical school and university relations. Given the current financial climate, what is the impact to the medical school if the university is struggling? How does it manifest in the services and expectations of our respective schools and medical centers? How do you prioritize and find efficiencies in resources and services, specifically around technology and space?

Speakers

Bess Wildman, MBA
Vice Dean, Academic Administration and Finance
Pritzker School of Medicine
University of Chicago Division of the Biological Sciences

Cathy Wood, MBA
Senior Associate Dean, Finance and Administration
Virginia Commonwealth University School of Medicine

2:30-2:45 p.m.

Networking Break

2:45-4 p.m.

Innovation Focus Part 3: Operations and People - Workforce Development

What are some innovative approaches to developing and retaining staff?
What metrics are you utilizing to determine whether your approach is working? How do you foster innovation with your teams in a changing environment?

Speaker

Mekia Amos, MBA

Associate Vice President of Business Operations

University of Houston Tilman J. Fertitta Family College of Medicine

Larisa Kure, MPA

Executive Assistant Dean, Administration and Finance

University of California, Davis, School of Medicine

4-4:15 p.m.

Networking Break

4:15-5 p.m.

Lightning Rounds

Attendees will join representatives from three other schools to share a problem they are facing and receive input from their peers.

5-6 p.m.

Reception**FRIDAY, SEPT. 20**

7:30 a.m.-4:45 p.m.

Registration and Information

7:30-8:30 a.m.

Breakfast

8:45-9:45 a.m.

Legislative Update

Tannaz Rasouli, MPH, senior director, public policy and government relations, AAMC, will provide a Washington update.

Speaker

Tannaz Rasouli, MPH

Senior Director, Public Policy and Government Relations

AAMC

9:45-10 a.m.

Networking Break

10-11:15 a.m.

Innovation Focus Part 4: Operations and People - Compensation

Learn from schools that have developed innovative compensation models for staff and faculty.

Speakers

Namil Choi, MBA, CPA, CMPE

Associate Dean for Administration and Finance and COO

University of North Dakota School of Medicine and Health Sciences

Richard Nuttall, MBA

Vice Dean for Finance and Administration

University of Texas Health Science Center at San Antonio Joe R. and Teresa Lozano Long School of Medicine

11:15-11:30 a.m.

Networking Break

11:30 a.m.-12:30 p.m.

Innovation Focus Part 5: Operations and People - Organizational Structures

What is an “ideal” organizational structure? How do you determine the right size of your dean’s office and whether to centralize or decentralize core functions? Have you had to undo what you previously thought was ideal?

Speakers

Farah Chapes, CPA

Senior Associate Dean and Chief Operating Officer

Emory University School of Medicine

Arnim Dontes, MBA

Deputy Dean, Finance and Administration

Yale School of Medicine

Steven Gentile

Executive Director, Finance and Administration

Yale School of Medicine

Heather Hamby, MPH

Executive Associate Dean and Chief Business Officer

Emory University School of Medicine

Greg Kharabadze, FACHE

Executive Director for Business Administration and Strategic Initiatives

Yale School of Medicine

12:30-1:30 p.m.

Hot Topics Lunch

1:45-3:15 p.m.

Innovation Focus Part 6: Financial Management - Funds Flow

Hear from schools about innovative ways they are considering their funds flow models. How are schools collaborating with their health system and

university to innovate around duplication of effort and finances, including areas of shared governance?

Speakers

Allen Metzenberg

Associate Dean and Chief Financial Officer
Stanford University School of Medicine

Bess Wildman, MBA

Vice Dean, Academic Administration and Finance
Pritzker School of Medicine
University of Chicago Division of the Biological Sciences

3:15-3:30 p.m.

Networking Break

3:30-4:45 p.m.

Innovation Focus Part 7: Financial Management - Data-Driven Decisions

This session will focus on using data to make decisions. How are departments receiving data and how is your institution instilling a culture of financial ownership over the department's financial performance? In considering your research portfolio, what data are you using to measure the return on your investment and how are you deciding where to dedicate your resources?

Speakers

Moe Aboufares, MBA, CPA

Senior Vice President and Senior Associate Dean for Administration and Finance
Kaiser Permanente Bernard J. Tyson School of Medicine

Anelia Farhi

Senior Director Finance and Administration
University of Virginia School of Medicine

4:45-6 p.m.

Closing Reception

Thank you for coming to the 2024 PBO Meeting! See you next year.

2024-2025 Group on Business Affairs (GBA) Steering Committee

National Chair

Cynthia Best, MBA

Vice Dean for Finance and Administration
University of Utah School of Medicine

National Chair Elect (2024-2025)

Matthew Comstock, MBA, MHSA

Chief Operating Officer
University of Michigan Medical School

Immediate Past Chair

Anja Paardekooper, drs

Senior Associate Dean, Finance and
Administration
University of California, Los Angeles, David
Geffen School of Medicine

Council of Deans (COD) Liaison

John Marymont, MD, MBA

Vice President, Medical Affairs and Dean
Frederick P. Whiddon College of Medicine at the
University of South Alabama

PBO at Large (2023-2025)

Michael Patriarca, MBA

Vice President, UT Health RGV
Executive Vice Dean, Finance and
Administration
University of Texas Rio Grande Valley School of
Medicine

PBO at Large (2024-2026)

Heather Campbell, MHS

Vice Dean for Finance and Administration and
Chief Operating Officer
Northwestern University Feinberg School of
Medicine

Member at Large (2024-2026)

John Sauer, MHA

Executive Administrator for Academic Affairs
and Administration
Emory University School of Medicine

Department Administrator Interest Group Representative

Susan Marx, MBA, PMP

Vice Chair, Finance and Administration,
Department of Surgery
Interim Vice Chair, Finance and Administration,
Department of Ophthalmology
University of Washington School of Medicine

Data and Benchmarking Committee Chair

Richard Nuttall, MBA

Vice Dean for Finance and Administration
University of Texas Health Science Center at
San Antonio Joe R. and Teresa Lozano Long
School of Medicine

Emerging Issues Committee Chair

Lauren Magaldi, MBA, MHA, MS

Associate Dean of Finance
Medical University of South Carolina College of
Medicine

Professional Development Committee Chair

Amanda Thatcher, MA

Chief of Staff and Senior Director of
Administration
The Ohio State University College of Medicine

Human Resources Interest Group Representative

Eric Conde, MSA

Senior Associate Dean for Administrative Affairs
University of Florida College of Medicine -
Jacksonville

StandPoint™ Surveys

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Jarod Field, MBA, Director

standpoint@aamc.org

Website: aamc.org/standpoint

AAMC StandPoint™ Surveys offers robust custom engagement surveys that delve into the factors unique to academic health institutions that drive the engagement and retention of faculty and staff. We partner with you to develop a comprehensive and customized approach to collecting essential employee feedback needed to support your institution's goals. AAMC experts and support offer a turnkey process for survey administration that ensures your institution can successfully collect rich and representative data.

Worksheet

Use the space below to document the things you want to remember and the things you want to do following the meeting.

<i>Things to Remember</i>	<i>Things to Do</i>

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<i>Things to Remember</i>	<i>Things to Do</i>

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Save the Date

2024

Learn Serve Lead: The Annual Meeting

Nov. 8-12, 2024

Atlanta, Georgia

2025

**Group on Business Affairs (GBA)
Group on Institutional Planning (GIP)
2025 Joint Spring Meeting**

April 23-25, 2025

Hyatt Regency Phoenix

Phoenix, Arizona

**2024 Principal Business Officers' Meeting,
*Sponsored by the Group on Business Affairs (GBA)***

Sept. 17-19, 2025

Saint Kate – The Arts Hotel

Milwaukee, Wisconsin

Learn Serve Lead: The Annual Meeting

Nov. 1-5, 2025

San Antonio, Texas



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American Medical Colleges**
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