

David Kaplan, MBA, ACMPE

Professional Summary

Innovative and highly motivated executive healthcare leader specializing in finance and business development with a passion for marketing, strategic financial planning, mergers and acquisitions, management, business development, recruitment, operations management, provider engagement and customer relations.

- Exceptional leadership, organizational, oral/written communication, interpersonal, analytical, and problem resolution skills. Thrive in fast paced independent and collaborative work environments.
- Strong emotional intelligence, which leads to vital relationship building and facilitation between immediate team and strategic partners throughout the organization, system, and community.
- A proven visionary leader with a track record of elevating programs that support mission and values, and masterful at creating pathways that drive high quality results in a complex environment.

Professional Experience

Colorado Mountain Medical President

Vail, CO
4/22 – Present

Responsible for overseeing the premier multi-specialty group across Summit and Eagle Counties which is now a wholly owned subsidiary of Vail Health. CMM consists of Primary Care (FP and GIM), Urgent Care, GI, Urology, OB/Gyn, ENT, Endocrinology, Behavioral Health, etc.) There are 36 Physicians across CMM and another 20+ APP's, with a budget of >\$30 million.

Dickson-Diveley Midwest Orthopaedics d/b/a Kansas City Orthopedic Alliance, Overland Park, KS

Chief Executive Officer

12/20-4/22

Responsible for integrating 3 of Kansas City's most well respected private Orthopaedic groups into one, under a new brand and infrastructure. "KCOA" consists of 32 physician owners and 4 employed physicians and over 200 employees across 5 clinical locations. Financial responsibilities include over \$30 million in clinical revenue and report up through the Executive Board, comprised of 7 Physician Owners, of the newly formulated group. Strong focus on strategic planning and bottom line revenue growth, operational structure, implementation of new technologies to streamline operations, real estate acquisitions and optimization to maximize portfolio/investments, and physician's coordination and alignment.

- Strategic development and management of practice operations and revenue cycle (\$150M+ annual charges) for MSK providers across 8 different services lines and 4 area hospitals (7 current locations with 2 more on horizon in next 12 months).
- Resulted in 5% financial growth within first year of merger compared to projection
- Created organizational structure, operating agreement, compensation plan for physicians,

- management, and staff
- Created and established KCOA Holdings, LLC, operating agreement, ownership valuation and financial modeling, and overall strategy
- Successfully purchased a new Urgent Care and imaging location which relocated leases and converted risk into an asset
- Fully leased out space to PT partners and practice prior to close which double valuation of property over night
- Successfully negotiated new payor contracts increasing revenue by over 20% instantly
- Co-chaired branding and naming committee and successfully created a new brand and logo with 3rd party SME's that received 90+% Physician agreement
- Created new culture and structure within the organization that immediately led to more accountability across our Departments and ultimately resulted in greater patient satisfaction and provider engagement
- Created and implemented new DME program and contract increasing margins by over \$200k/year
- Fostered strong banking relationships in the community that led to new credit card program and loan opportunities for both CapEx and Real Estate
- Co-created and negotiated bundled payment programs within our Physician Owned Hospital, Ambulatory Surgery Center, and clinical settings
- Involved and leading numerous joint venture conversations with local health systems, venture capital funds, and payors to health paint the picture of the KC Metro landscape for many years to come
- Participated in local Executive podcast, "Lemme Be Brief", discussing the business of healthcare and Kansas City Orthopedic Alliance in the community
- Successfully recruited 2 new Sports surgeons to the market for Summer of 2022 to help solidify our market presence in strategic geographic locations

University of Colorado, School of Medicine, Aurora, CO

Director and Vice Chair of Finance, Strategy, and Administration

Department of Orthopedics

12/14-12/20

Administrator for business operations within clinical, research and educational services across 250+ surgeons/faculty members split between Pediatric and Adult specialties. Financial responsibilities include \$75+ million in clinical revenue and \$15 million in research grant and/or clinical trial revenue annually. Strong focus on mergers and acquisitions, business development, and MD talent acquisition. Business management responsibilities include management for clinical professional practices, research development, educational operations, departmental marketing, fundraising, human resources, fiscal operations as well as contract and consulting negotiations.

- Strategic development and management of practice operations and revenue cycle (\$280M+ annual charges) for Orthopedic providers across 8 different services lines and 10 area hospitals (21 current locations with 3 more on horizon in next 12 months).
 - Resulted in 10+% financial growth on an annual basis
- Created new culture and Department administrative structure through aligning employee skill sets with appropriate job scope. Resulted in a greater provider support and employee and faculty satisfaction.
- Lead role in acquisition of two major private orthopedic groups throughout the State of Colorado in coordination with UCHHealth. Resulted in successful acquisition of the Steadman Hawkins Clinic Denver increasing Department Income by \$15+ million annually.
 - Design and build of 2 Sports Performance locations as well as 3 other clinical locations totaling over \$250 million in construction

- Successful creation and implementation of Department Incentive plan which aligns physicians' incentives with business operations and Department mission, enabling us to achieve competitive salaries to promote the recruitment of top physicians
- Appointed to major system level committees such as CU System wide Governance and Compliance Committee, Finance and Operations Committee and Governance Board for Boulder Sports Performance Center, Steadman Hawkins Clinic Governance, Provider Marketing Committee, Business Intelligence Committee, Executive Committee for Business Development at System level, System Wide Sports Medicine Service Line, Finance Chair for Department Committees, Orthopedics Executive Committee, and others.
 - Selected in March 2019 to participate in the Executive Leadership Program reserved for Top Talent at The University of Colorado.
- Responsible for proposing and completing a \$1.7 million investment in the Boulder Sports Performance Center, which is a joint venture with Boulder Community Health.
- Created and implemented new research focused division, Division of Regenerative Medicine and Translational Research, to position the Department as a nationally recognized top 10. Currently ranked #18 nationally per US News and World Report.
 - Resulted in almost \$10 million in NIH funding within first year
 - Over \$12 million in grant funding in year 2
- Created and implemented new reporting structure and departmental dashboards to promote transparency of key business metrics as well as benchmark performance to internal and national standards.
- Created new DME Service Line, after months of negotiations with health systems, within the Department of Orthopedics and successfully implemented the program within UCHHealth Hospitals, clinics, and OR's. This profit will provide a large amount of funding to our Research Mission, offsetting current overhead, and allow us to better serve our patients.
- Created and manage 5 distinct Professional Service Agreements (PSA's) containing different business models across various markets in the UCHHealth system to ensure Orthopedic coverage.
- Created unique room rental model for Inverness Sports Performance Center that will be standard overhead model for all freestanding clinics in the future.
- Responsible for tripling our Providers in 5 years and led all high level recruitments and LOO process.

CU Sports Medicine and Performance Center, Boulder, CO

Interim Executive Director

10/16-4/17

As a primary investor in the Center that is a Joint Venture between University of Colorado and Boulder Community Health, I was selected to the Interim Executive Director role by the board. This is an extension of my Chief Administrative role within the Department of Orthopedics but in the short time in this role, terrific progress has been made from a change in culture standpoint and a financial standpoint.

- Implemented new strategic plan to grow Sports Performance that will result in close to \$500,000 in revenue and 6 new partnerships.
- Responsible for analysis on current pricing to ensure we are competing in the community.
 - Resulted in change in MRI, self-pay PT pricing, and injection pricing.
- Re-built strong relationships with internal customers at CU that had previously been severed which will result in better patient access, extended working hours, and more on-site support in several areas key to the center.

Regis University, Rueckert-Hartman College for Health Profession, Denver, CO

Affiliate Faculty for the Division of Health Services Education

10/16-Present

Professor for Masters Level courses in Advance Health Care Finance, Health Care Strategy, and Management. Facilitating courses that focus on the education of capital requests, healthcare strategy, budgeting processes, management, operations, and overall healthcare finance.

Children's Hospital Colorado, Aurora, CO***Business Manager***

01/12- 12/14

Responsible for the professional practice of the Sections of General Pediatrics and Adolescent Medicine totaling over 65 providers and 6 different clinics. This includes the financials, research and grant management, provider productivity, and management of support staff for the Sections under the Department of Pediatrics.

- Created and implemented provider leave policy, monthly provider scorecard, and provider productivity targets that resulted in tremendous (over 30% on average) growth in revenue of each clinic
- Created various tools, through the use of reports and excel spreadsheets, to track provider billing levels which showed discrepancies among providers in similar clinics. This resulted in partnering with coders to help train appropriate billing behaviors ensuring they were recorded at the highest possible level capturing greater reimbursement for services. Conclusion was increased average revenue per patient by 20%.
- In an effort to provide a higher level of service and support for providers, the support staff underwent additional training and vision meetings. Recruited new staff who met the vision that was outlined and came up with terrific tools and policies to ensure accountability and ownership. Resulted in continuous recognition by Section Heads and direct supervisors and yielded higher provider satisfaction.
- Senior leadership specifically requested assistance in creating a financial strategic business plan for a new Bioinformatics Department. After collaboration with various departments and subject matter experts, the plan was approved by the Children's Hospital and the Department of Pediatrics at the University of Colorado.
- Built trust and multiple communication lines with providers to help understand and meet their day to day needs, as well as conveying our business strategy to work on agreeable compromises in an effort to achieve aggressive growth and clinical objectives. This resulted in a 30% average visit volume growth across all clinics.
- Selected to mentor a group of Johns Hopkins International MBA students in a course to create an innovative strategy to expand our Family Planning Program. Resulted in forward thinking strategies that helped create philanthropy opportunities among the community raising over \$100,000.

System Administrator

02/08- 01/12

The administrator for the scheduling call monitoring system and patient satisfaction vendor. Responsible for training and coaching of managers on scheduling script and reporting. Manage patient and employee satisfaction survey tool (PRC) and provide service training for staff, providers, and management.

- Created and implemented various strategies and goals for departments based off of rounding and shadowing patients that resulted in a 6% increase over a 2 year period of patient perception data on PRC.
- In an effort to actively engage clinical faculty, initiated provider level sampling across all Ambulatory Clinics and consistently met with and trained providers on behaviors to

- change patient perception. Resulted in consistent clinical leadership recognition and requests to implement similar strategies across other areas of the hospital.
- Created Executive reports and Hot Buttons (weekly reports) for all hospital clinics and consistently asked to attend Senior Leadership meetings and retreats to present data.
- Requested by leadership to chair the Measurement Service Excellence Team (MSET) and through this position created an internal customer satisfaction survey to break down silos among departments.
 - Results of the internal customer satisfaction survey increased by 4% over baseline in just 1 year through efforts of the MSET
- Partnered with the Strategy Division to create standardized service line scorecards and co-created White Paper on strategic growth for the Executive Team
- Chosen to create and lead a team in an RFP process to evaluate a new potential patient satisfaction vendor. Team met all deadlines and recommendation was agreed upon by Executive Team.
- Designated to work closely with Studer consultant to implement new strategies in customer service across the hospital, which lead to a 5 year plan of implementing various committees.

NewDay Financial, Denver, CO/Salt Lake City

Sr. Mortgage Banker/ Account Manager/ Captain of Sales Team

08/2006- 11/2007

Mortgage banker and financial counselor that specialized in the sale of a niche product at 125% loan to value. Specialized in debt consolidation, credit report breakdowns and improvement, as well as creating 5-year financial strategies for our customers.

- After passing intense 2 month credit and mortgage training program was elected to help open a new branch in Salt Lake City. Quickly became the number one sales representative on filling loan pipeline and closed loans for Denver and Utah branches
- After averaging over \$900,000 in closed loan volume for consecutive months was asked to lead a sales team. Continued the large volume over a 9 month span even with the additional leadership duties, resulting in \$350,000 in total fees/revenue for NewDay which was second in our branch.
- The knowledge and financial education received in this role has proven critical in helping customers at NewDay obtain a better financial outlook as proven by the many thank you notes and emails received, as well as in the financial roles held in healthcare.

The Poker Lounge, Memphis, TN

Owner and Founder

08/2004-07/2006

Created a marketing company to attract customers to restaurants and bars on their typical slow night, which resulted in being the largest free roll poker company in the Mid-South.

- Created scripting and business strategy that sold the idea to over 25 restaurants and bars resulting in over 5,200 customers/following in just over a year.
- Increased revenue by at least 25% every quarter
- Created website and online ranking system that attracted over 200 hits a day and helped create the culture of our customers.
- Co-sponsored largest charity poker tournament in the world at a casino in Tunica, bringing in \$97,000 net for United Cerebral Palsy
- Held Charity tournaments for St. Jude's Children's Hospital, Make a Wish Foundation, and United Cerebral Palsy raising over \$50,000 in 2 years.
- As majority owner kept all books, prepared schedule, handled day to day activities, cold called on a daily basis, kept strong relationships with clients, customers, players, and marketing partners, developed a large email list, and ran tournaments on a nightly basis

- Recruited/hired and managed over 20 employees which included training for each position, average employee stay was a full year.

Education

Regis University, Denver, CO

MBA with emphasis on operations and project management

- GPA: 3.810
- Awarded most innovative by Professor in Innovations in Business Operations course.

University of Kansas, Lawrence, KS

Bachelor of Arts Degree, Applied Behavioral Science

Professional Certification and Affiliation

- Graduate level Project Management Certification
- Certified Medical Practice Executive (CMPE) through MGMA
- Member of the Association of Administrators in Academic Pediatrics (AAAP), Academic Orthopaedic Consortium (AOC), MGMA, and AAOE.
- Affiliate Faculty member of Regis University

Community Service and Interests

- Coached 14 and under youth basketball in the Maccabi Games for 3 consecutive summers
- Volunteer for several non-profits in the Denver area