A New Rx for Building Leaders

Linking Talent Strategy to Business Strategy
Presenters

Joe DiPaolo, FACHE
Western Region President
Atlantic Health System

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President & Founder
The Leadership Development Group

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Western Region COO/CNO
Atlantic Health System
Learning Objectives

• Understand how healthcare systems are leading transformative change through emerging leadership roles

• Learn how success profiles are developed as the bedrock for new leadership roles

• Learn how to apply success profiles for assessment, selection, and development in strategic succession planning
Agenda

• Overview of the Healthcare Landscape & Impact on Talent Strategy

• A Process to Align Talent Strategy to Executive Business Strategy

• Case Study – From Theory to Practice

• Final Thoughts
Our World / Our Industry

VUCA
1\textsuperscript{st} Tsunami: Resource Overload
2nd Tsunami: Big Data
3rd Tsunami: Technology
4th Tsunami: Empowered Individuals
The Burning Platform

- Healthcare leaders must meet growing demands and complexity related to the shift to a value-based system.
- The healthcare industry has been faced with the crisis of high turnover and talent shortages.
- Increased importance of preparing and retaining talented clinical and non-clinical individuals to:
  - Manage the challenging healthcare climate
  - Meet the ambitious expectations of health reform
  - Reduce costs
  - Ensure quality of care
The Impact on Talent

Talent Management Aligned with Strategy

Talent Management Practices
Aligning Talent to Strategy

1. Understand Business Strategy
2. Create Success Profiles
3. Apply Success Profile
4. Evaluate Impact on Business Results
5. Align Roles to Execute Strategy
Understand Your Business Strategy
Who is AHS-Western Region?

Atlantic Health System
- 5 Hospital System in New Jersey
- Not for profit
- 12,114 employees
- 3,168 physicians
- 1,339 licensed beds

Newton Medical Center
- 1196 employees
- 335 physicians
- 148 licensed beds
- 8,040 Admissions
- 31,159 ED visits
- Net Patient Revenue - $129M

Hackettstown Medical Center
- 840 employees
- 260 physicians
- 111 licensed beds
- 3,342 Admissions
- 20,202 ED visits
- Net Patient Revenue - $77M
AHS Regional Opportunity: Economies of Scale

- Identical patient demographic and geography
- Adjacent markets: Total of 300,000
- Shared medical staff (Over 80 practitioners)
- Shared advertising market
- Hospital foundation alignment/donor base
- Experienced NMC management team
- AHS enjoys high market share in HMC market
- Consolidation opportunity i.e. medical records, food service, security, patient satisfaction, infection prevention, perioperative services, radiology, etc.
AHS Western Region

Business Strategy

• Enhancing reputation as the “safest” hospitals in the region
• Achieve region’s critical role as a AHS “feeder” hospital
• Continue to build Atlantic Health brand within the community by leveraging AHS’ services across full care continuum
• Fulfill region's role with transitional care continuum and the Atlantic ACO
• Increase market share through expansion of ER, Diagnostics, and Outpatient Services
• Focus workforce on the Total Patient Experience
• Align community physicians to support region’s mission, strategy & goals
AHS Western Region Management Opportunity

• Our Mission as Leaders:
  – To create the enabling conditions for care to occur

• Where does Strategy end and Tactics begin

• Our challenge as Leaders:
  – Deliver optimal care and experience
  – Minimize variation
  – Reduce costs
  – Defining and building the ‘Culture’
New Requirements of Healthcare Talent

- Passionate & Engaged
- Technology Oriented
- Critical Thinkers
- Adaptability to Change
- Team Players
- Patient Centered
AHS – Western Region

Nursing & Operations
# AHS – Western Region

## Table of Organization

<table>
<thead>
<tr>
<th>CFO</th>
<th>VP Quality &amp; CMO</th>
<th>AHS Corporate VPs</th>
<th>President</th>
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<tbody>
<tr>
<td>Finance Director</td>
<td>Quality Director</td>
<td>Service Line Directors</td>
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<td>Joint Commission Preparedness</td>
<td>Oncology</td>
<td>Physician Relations</td>
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<td>Behavioral Health</td>
<td>Orthopedics &amp; Sports Health</td>
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<td>Sussex Region ACO</td>
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<td>Auxiliary</td>
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**AHS CORPORATE FUNCTIONS**

Success Profiles Defined

WHAT PEOPLE **KNOW**
Technical and/or professional information needed to successfully perform job activities

WHAT PEOPLE **HAVE DONE**
Educational and work achievements needed to successfully perform job activities

WHAT PEOPLE **CAN DO**
A cluster of behaviors performed on a job

WHO PEOPLE **ARE**
Personal dispositions and motivations that relate to job satisfaction, job success or failure
Why do we profile success?

Success Profile

- Selection/Promotion
- Development
- Performance Management
- Succession Planning

Create Success Profiles for Strategic Roles
Creating a Success Profile

1. Plan
Creating a Success Profile

1. Plan

2. Collect information
Creating a Success Profile

1. Plan

2. Collect information

3. Build tentative model
Creating a Success Profile

1. Plan
2. Collect information
3. Build tentative model
4. Confirm model
# AHS – Western Region
## CNO/COO Success Profile

<table>
<thead>
<tr>
<th>ORGANIZATIONAL IMPERATIVES</th>
<th>ROLE RESPONSIBILITIES</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Enhancement of hospital reputation as the “safest” hospital in the region</td>
<td>- Oversee operations of hospital by leading clinical and operational services</td>
</tr>
<tr>
<td>- Continue to build hospital brand within the community</td>
<td>- Ensure uncompromised collaboration between all clinical and operations departments to deliver high productivity, clinical quality and patient experience</td>
</tr>
<tr>
<td>- Achieve hospital’s critical role as a system “feeder” hospital</td>
<td>- Assure delivery of quality, cost effective, and patient-centered services to meet the current and future health care needs of the community</td>
</tr>
<tr>
<td>- Fulfill hospital’s role with transitional care continuum and the system’s ACO</td>
<td>- Review operational and capital expenditures and recommends actions to the President</td>
</tr>
<tr>
<td>- Increase market share through expansion of ER, OR &amp; Outpatient Services</td>
<td>- Evaluate the performance of the management team.</td>
</tr>
<tr>
<td>- Focus workforce on the Total Patient Experience</td>
<td>- Ensure all organizational objectives and policies are articulated and implemented</td>
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<tr>
<td>- Align community physicians to support hospital mission, strategy and goals</td>
<td>- Take responsibility for all elements of exceptional clinical nursing practice and shared governance</td>
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<td>- Ensure integration of processes with medical staff</td>
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<td>- Oversee compliance and accreditations with regulatory agencies. Serves as liaison to the corporate staff, service lines, senior administration and medical staff</td>
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<td>- Champion hospital quality standards</td>
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## AHS – Western Region CNO/COO Success Profile

### Competencies

<table>
<thead>
<tr>
<th>Interpersonal Skills</th>
<th>Leadership Skills</th>
<th>Business/Management Skills</th>
<th>Personal Attributes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Communicates with impact</td>
<td>Leads through vision &amp; values</td>
<td>Healthcare Financial Acumen</td>
<td>Drive for results</td>
</tr>
<tr>
<td>Patient/Client Centric</td>
<td>Change champion</td>
<td>Operational Decision making</td>
<td>Adaptability</td>
</tr>
<tr>
<td>Cultivates collaborative relationships across boundaries</td>
<td>Effectively delegates</td>
<td>Mobilizes resources across boundaries</td>
<td>Reads the environment</td>
</tr>
<tr>
<td>Rapidly builds trust</td>
<td>Builds team &amp; organizational bench strength</td>
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<td>Managerial courage</td>
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<td></td>
<td>Drives culture of Accountability</td>
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<td>Learning agility</td>
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<td>Approachability</td>
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</table>
AHS – Western Region  
CNO/COO Success Profile

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<tr>
<th>KEY SUCCESS FACTORS</th>
<th>FOUNDATIONAL EXPERIENCES</th>
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</thead>
<tbody>
<tr>
<td>Engages workforce around total patient experience model</td>
<td>Experience with hospital operations including running a department &amp; budget</td>
</tr>
<tr>
<td>Quickly gains the trust of Nursing &amp; other key stakeholders</td>
<td>Working effectively across service lines</td>
</tr>
<tr>
<td>Works well across traditional boundaries</td>
<td>Understands finance and has effectively managed to budget and cost</td>
</tr>
<tr>
<td>Ensures small “wins” in first 100 days</td>
<td>Deep &amp; broad clinical nursing expertise</td>
</tr>
<tr>
<td>Has senior management &amp; organizational support</td>
<td>Successful experience in a team, results-oriented environment</td>
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<tr>
<td></td>
<td>Ability to develop operational systems that provide high quality patient care experience while achieving financial results</td>
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</tbody>
</table>
## Leadership Style and Culture

- Puts the success of hospital ahead of own aspirations
- Empowers others while monitoring progress and consistently providing performance feedback & coaching
- Displays the right balance of patience and urgency to allow strategies enough time to develop and to deliver agreed upon results.
- Demonstrates an energetic, adaptive and optimistic approach to the challenges
- Shows ability to think creatively and take appropriate risks
- Deals well with ambiguity

## Derailers

- Not self-aware or open to feedback
- Compromises on ethical issues for short term gains
- Micromanagement of staff
- Avoids confrontation — backs off difficult decisions, is too nice, protects people or too thin-skinned
- Frequent problem escalation
- Poor organizational fit
- Lack of senior management & organizational support
- Not championing & living the quality standards
Applying Success Profiles

- Conduct Interviews
- Administer Psychometric Assessments
- Train Selection Committee on Behavioral Event Interviews
- Appoint Selection Committee
- Create Role Success Profile
- Select Candidate
- Make Offer and Create On-boarding Plan
- Organizational Strategy & Identify New Roles
Behavioral Event Interviews
Psychometric Assessments

<table>
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<tr>
<th>Hogan Business Reasoning Inventory</th>
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<td>Hogan Development Survey</td>
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</table>
## Candidate Comparisons (Background)

<table>
<thead>
<tr>
<th>Candidate 1</th>
<th>Candidate 2</th>
<th>Candidate 3</th>
<th>Candidate 4</th>
<th>Candidate 5</th>
<th>Candidate 6</th>
</tr>
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<tbody>
<tr>
<td><strong>EDUCATION</strong></td>
<td><strong>CURRENT ROLE</strong></td>
<td><strong>PREVIOUS ROLES</strong></td>
<td><strong>KEY ACHIEVEMENTS</strong></td>
<td><strong>EDUCATION</strong></td>
<td><strong>CURRENT ROLE</strong></td>
</tr>
<tr>
<td>• BS in Nursing, William Paterson College</td>
<td>• Manager of Cardiac Research/Valve/Hypertrophic Cardiomyopathy Center</td>
<td>• Manager of Telemetry, Orthopedics, CCU and Monitor Technicians</td>
<td>• Identify and lead initiatives to maximize operational effectiveness</td>
<td>• BS in Nursing, William Paterson College</td>
<td>• Manager of Surgical/Trauma/Neuro ICU and Medical ICU</td>
</tr>
<tr>
<td>• Registered Nurse, NJ License, William Paterson College</td>
<td>• Nurse Manager</td>
<td>• Manager of Overlook Operations</td>
<td>• Execute strategies for program development</td>
<td>• MS in Health Care Management, The College of St. Elizabeth</td>
<td>• Manager of Hyperbaric Medicine Department</td>
</tr>
<tr>
<td>• MBA, Seton Hall University</td>
<td>• Assistant Head Nurse, Pediatrics</td>
<td>• Manager of Cardiac Services</td>
<td>• Enabled growth of program by justifying positions via revenue growth</td>
<td>• Diploma, St. Francis School of Nursing</td>
<td>• Manager of Nursing Resource Center</td>
</tr>
<tr>
<td>• Diploma in Nursing, Mountainside Hospital School of Nursing</td>
<td>• Staff Nurse, Pediatrics</td>
<td>• Program Director</td>
<td>• Chaired committees in developing and implementing physician order sets across the system</td>
<td>• BS in Nursing, St. Peter’s College</td>
<td>• Manager of Nursing Informatics</td>
</tr>
<tr>
<td>• Managing Nurse</td>
<td>• Manager, Peri-operative Services</td>
<td>• Nurse Manager</td>
<td>• Evaluation of employee performance and employee conduct</td>
<td>• Master’s in Nursing, New York University</td>
<td>• Manager of Orthopedic Unit and Northern NJ Regional Arthritis Center</td>
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<tr>
<td>• Diploma in Nursing, St. Francis School of Nursing</td>
<td>• None</td>
<td>• Co-Chair Family Centered Care Initiatives at the Children’s Hospital in the PICU and Pediatric ED</td>
<td>• Co-Chair Family Centered Care Initiatives at the Children’s Hospital in the PICU and Pediatric ED</td>
<td>• MBA Certificate Program, Tulane University</td>
<td>• Manager of Nursing Education Department</td>
</tr>
<tr>
<td>• Diploma in Nursing, Mountainside Hospital School of Nursing</td>
<td>• None</td>
<td>• Planning and construction of O.R. room expansion in the Ambulatory Surgery Center</td>
<td>• Planning and construction of O.R. room expansion in the Ambulatory Surgery Center</td>
<td>• MS in Nursing, University of Phoenix</td>
<td>• Responsible for a 9 million dollar budget and 100 FTEs with 24/7 responsibility for patient care and quality initiatives</td>
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<tr>
<td>• Diploma, St. Francis School of Nursing</td>
<td>• None</td>
<td>• Construction planning and implementation of renovation of pre op and PACU area</td>
<td>• Construction planning and implementation of new interventional Endoscopy suite</td>
<td>• Associate Degree in Applied Science, The College of St. Elizabeth</td>
<td>• Oversight of the hospital wide ICU staffed Rapid Response Team</td>
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<tr>
<td>• Diploma, Mount Sinai School of Nursing</td>
<td>• None</td>
<td>• Planning and construction of new interventional Endoscopy suite</td>
<td>• Roll out of WHO safety checklist in all operating rooms</td>
<td>• BS in Nursing, Trenton State College</td>
<td>• Cross-trained ICU staff in order to accommodate critical inpatients</td>
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<tr>
<td>• Diploma, St. Francis School of Nursing</td>
<td>• None</td>
<td>• Delivered effective and efficient patient care through the development, implementation, and evaluation of institutional and division policies and procedures</td>
<td>• Standardized AHS system process for the Patient itinerary</td>
<td>• MS in Nursing, University of Phoenix</td>
<td>• Oversight of the hospital wide ICU staffed Critical Care Services and Nursing Practice</td>
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<tr>
<td>• Diploma, St. Francis School of Nursing</td>
<td>• None</td>
<td>• Implemented nursing process for mortality review in coordination with shared governance quality committee</td>
<td>• Oversight Nursing Shared Governance</td>
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<tr>
<td>• BS in Nursing, Molloy College</td>
<td>• None</td>
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<tr>
<td>• MS in Nursing, Adult Nurse Practitioner, Seton Hall University</td>
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</table>
## Candidate Comparisons (Competencies)

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<td>Communicating with Impact</td>
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<td>Cultivates Collaborative Relationships</td>
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<td>Leads Through Vision &amp; Values</td>
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<td>Change Champion</td>
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<td>Effectively Delegates</td>
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<td>Builds Teams &amp; Organizational Bench</td>
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<td>Drives Culture of Accountability</td>
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<td>Mobilizes Resources Across Boundaries</td>
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<td>Drive for Results</td>
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<td>Reads the Environment</td>
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<td>Managerial Courage</td>
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<td>Learning Agility</td>
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## Candidate Comparisons (Psychometrics)

<table>
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<tr>
<th>Psychometric Assessments</th>
<th>Candidate 1</th>
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<td>Thomas Kilmann Conflict Styles Inventory–TKI</td>
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</tbody>
</table>
Feedback, Onboarding, Development

Assessment Feedback
Feedback, Onboarding, Development

Assessment Feedback → Development Planning
Feedback, Onboarding, Development

- Assessment Feedback
- Development Planning
- Team Assimilation Meetings
Feedback, Onboarding, Development

- Assessment Feedback
- Development Planning
- Team Assimilation Meetings
- On-board Coaching
Feedback, Onboarding, Development

1. Assessment Feedback
2. Development Planning
3. Team Assimilation Meetings
4. On-board Coaching
5. Measure Success & Plan for Sustained Success
Evaluate Business Results
How We Measure Success

Organization Perspective
• Seamless transition
• Employee engagement
• Patient experience

Individual Perspective
• Strong staff and physician relationships
• Multidisciplinary respect
• Expanded span of control
• Self-awareness and humility
Lessons Learned

- Nothing is static.
- Only constant is change.
- Requires agility, strategic thinking and leadership support.
- Recognition of challenge of “dual masters”
For Your Consideration

- Given our organization’s short and long term strategic objectives, what new capabilities do we need in order to execute with success?

- What is our organization’s current strategy for identifying and developing succession planning candidates?

- Does our current talent pool possess the capabilities to meet our organization’s objectives?
  
  o If not, are they capable of being developed?
  o Where can we recruit to fill those gaps?
Last Step

• What did you find most useful about this presentation?
• What questions do you have?
Joseph DiPaolo, FACHE
Western Regional President, Atlantic Health System

Joe is directly responsible for overseeing all operations within the region and ensuring the quality, safety, and financial integrity of the hospitals and their ambulatory operations. In his time with Atlantic Health, Joe has held several senior hospital operations and corporate roles including system wide leadership of AHS' Supply Chain and Orthopedic Service Line. He continues to serve as a corporate VP with ongoing shared service department responsibilities across the system including AHS Pharmacy and Laboratory services.

Joseph.DiPaolo@atlantichealth.org
(973) 579-8301
Tracy Duberman, PhD, FACHE
President & CEO, The Leadership Development Group

Tracy founded The Leadership Development Group, a global talent development firm for executive and physician leaders, teams, and organizations across the healthcare ecosystem, including providers, payers, and pharmaceutical companies. TLD is comprised of a worldwide faculty of over 200 organizational development practitioners, academicians, coaches, and consultants with deep expertise in the healthcare industry to align talent to execute strategy and improve performance through educational workshops, tailored on-site leadership development programs, and tailored individual coaching for physician and healthcare leaders.

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Denise Fochesto, RN
Western Regional COO/CNO, Atlantic Health System

In this new role, Denise Fochesto is responsible for overseeing the overall operation of the Western Region’s patient care and clinical services to ensure delivery of quality, cost effective and patient-centered programs to meet the current and future health care needs of the community and fulfill the vision and mission of the western region’s hospitals and its parent organization, Atlantic Health System. Fochesto served as manager of the 22-bed Surgical/Trauma/Neuro Intensive Care Unit; the 10-bed Medical Intensive Care Unit; Hyperbaric Medicine Department; and Nursing Resource Center of Morristown Medical Center.

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Bibliography


