

A stylized landscape illustration. At the top, a thick black arc represents the horizon. Below it, a large, semi-circular sun with a yellow-to-white gradient is positioned behind a black silhouette of a mountain range. The sky is a gradient of light blue to white. The text is centered in the lower half of the image.

# **WESTERN REGIONAL TRUSTEE SYMPOSIUM**

## **A Historical Perspective**

by Lanny A. Kope, EdD

## About the Western Regional Trustee Symposium

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The Western Regional Trustee Symposium (WRTS) offers quality healthcare governance programming at an affordable cost. Designed for hospital board members and executive leadership, the program broadens the participants' awareness of current healthcare trends that affect them, and how they serve their boards and communities. Best practices of successful healthcare governance are shared for practical application in the boardroom. WRTS provides excellent networking opportunities for trustees and leaders from hospitals of varying size and scope. This symposium is geared toward rural and Critical Access Hospitals, and aims to challenge conventional thinking with fresh approaches to standard healthcare governance concerns and business practices.

**The ultimate goal of the symposium is to form and maintain healthcare governance excellence at each hospital in the western and midwestern United States.**

The Western Regional Trustee Symposium is a collaboration between the hospital associations of Arizona, Colorado, Idaho, Montana, Nebraska, Nevada, New Mexico, North Dakota, South Dakota, Utah and Wyoming.

Attendees gain increased knowledge about many issues through educational sessions, networking, and information exchange with other trustees. Educational sessions provided address important issues to healthcare trustees and executives. This unique event offers top-notch educational programming, as well as networking opportunities for attendees.

The WRTS planning committee coordinates all aspects of the meeting. The planning committee consists of hospital trustees and hospital association staff from committee member states. WRTS meetings are hosted annually in June on a rotating schedule of the states involved in the planning: Arizona, Colorado, Idaho, Montana, Nebraska, Nevada, New Mexico and Utah.

## Sponsorship Opportunities

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WRTS is proud to collaborate with many generous sponsors who make the symposium possible. WRTS offers a variety of sponsorship opportunities.

For more information, [trusteesymposium.org](http://trusteesymposium.org).



## The Beginning of Something Special

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In the mid to late 1990s, pragmatic and inexpensive educational opportunities for hospital trustees were not readily available. There were occasionally national trustee programs, but these were usually expensive, precluding attendance by trustees from smaller hospitals and limiting the number who could attend from other hospitals.

In the midst of this challenge to provide meaningful and reasonably priced trustee education, three hospital trustees: **Liz Molina** from Gritman Medical Center in Moscow, Idaho; **Jane Oehm** from Exempla Healthcare in Denver, Colorado, and **Lanny Kope, EdD**, from Phoenix Memorial Hospital in Phoenix, Arizona, had a dinner conversation at an American Hospital Association (AHA) sponsored event.

They were concerned that the changing face of healthcare was requiring more and more trustee knowledge of its dynamics; yet, meaningful and inexpensive educational opportunities were not readily available to fill the educational void.

These trustees reasoned that regional rather than national programs would be of greater benefit to trustees in AHA's Region 8, and these programs could be implemented at a reasonable cost. A further consideration was that hospital trustees were in the best position to know what educational topics were appropriately suited for and most needed by trustees.

These three trustees continued their discussions over a few months and scheduled a meeting with the association executives from the AHA Region 8 states: Arizona, Colorado, Idaho, New Mexico, Montana, Utah and Wyoming.

The three trustees met with the state association executives and put forth a proposal: (a) Have an annual trustee symposium for trustees in Region 8 and invite trustees in neighboring states as well; (b) Use experience-based speakers who would be willing to share their knowledge and who would waive a speaker's fee; (c) Create a steering committee of two people from each Region 8 state, one a trustee for curriculum and program design, and the other an association staff member for administration and logistics; (d) Rotate the program location from state to state on an annual basis; and (e) Be prepared to underwrite any financial shortfall that might occur.

## WRTS is Born

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The Western Regional Trustee Symposium was born on April 25-26, 1997 at the Inn at Loretto in Santa Fe, New Mexico. Mother Nature christened the new educational undertaking with a snow storm!

A planning committee was formed of two individuals, one trustee and one association staff member, from each state which has continued to be a successful organizational structure to this date. The planning committee is chaired by a hospital trustee. The American Hospital Association contributed start-up funding and continued to support the WRTS until it became a self-sustaining entity.

Since then, six other states have joined, making a total of 11 participating states: Idaho in 1999; Montana and Wyoming in 2000; Nebraska in 2008; North Dakota in 2012 and South Dakota in 2014.

## Symposium Locations

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The symposia held since 1997 feature select themes, keynote speakers and several breakout sessions.

### **1997 - Santa Fe, NM**

Theme: *Trustees in Transition: A Regional Meeting on Hospital/Health System Governance in Changing Times*

Featured keynote speakers: Jamie Orlikoff, Carmela Coyle, Reg Ballantyne  
Chair: Jane Oehm, Exempla Health System - Denver, CO

### **1998 - Denver, CO**

Theme: *Trustees in Transition: The Southwest Regional Symposium*

Featured keynote speakers: Russell Coile, Dick Davidson  
Chair: Lanny A. Kope, EdD, Phoenix Memorial Hospital - Phoenix, AZ

### **1999 - Scottsdale, AZ**

Theme: *Seizing the Challenge of Stewardship*

Featured keynote speakers: Emily Friedman, Brian Goodell, MD, Tyler Norris  
Chair: Lanny A. Kope, EdD, Phoenix Memorial Hospital - Phoenix, AZ

### **2000 - Lake Tahoe, NV**

Theme: *Charting a Course for Healthcare in the New Millennium*

Featured keynote speakers: Michael Pugh, Robert Parsons, James Cathcart, Carmela Coyle, Barry Wong, MD  
Chair: Joel Ohlsen, MD, St. Mary-Corwin Medical Center - Pueblo CO

**2001 - Salt Lake City, UT**

Theme: *Champions of Healthcare*

Featured keynote speakers: Milt Hammerly, MD, M. Gordon Johnson, Jamie Orlikoff, Carmela Coyle, Brent James, MD, Clint Maun

Chair: Joel Ohlsen, MD, St. Mary-Corwin Medical Center - Pueblo, CO

**2002 - Sun Valley, ID**

Theme: *Scaling New Heights in Healthcare*

Featured keynote speakers: Pamela Knecht, Edward J. O'Connor, PhD, Dale L. Schultz, Barry Bader

Chair: David Althoff, Catholic Healthcare West - Phoenix, AZ

**2003 - Santa Ana Pueblo, NM**

Theme: *Challenging Crossroads in Healthcare*

Featured keynote speakers: Emily Friedman, Nate Kaufman, Russ Coile, Michael Pugh, Lanny A. Kope, EdD

Chair: David Althoff, Catholic Healthcare West - Phoenix, AZ

**2004 - Denver, CO**

Theme: *Preserving the Past; Redefining the Future*

Featured keynote speakers: Tyler Norris, Jamie Orlikoff, Joe Beck, MD, Reed Tuckson, MD

Chair: James Hertel, Platte Valley Medical Center, Brighton, CO

**2005 - Scottsdale, AZ**

Theme: *Rebirth, Resilience, Reform*

Featured keynote speakers: Carl Hammerschlag, MD, Kenneth Kizer, MD, Rich Umbdenstock

Chair: Bil Bruno, Maricopa Integrated Health System - Phoenix, AZ

**2006 - Lake Tahoe, NV**

Theme: *A Celebration of Stewardship*

Featured keynote speakers: Emily Friedman, Joseph Bujak, MD, Leonard Kirschner, MD

Chair: Char Jonsson, Sidney Health Center - Sidney, MT

**2007 - Park City, UT**

Theme: *Achieving Balance*

Featured keynote speakers: Lowell Catlett, PhD, Eric Lister, MD, Larry Walker

Chair: Marie Kotter, Intermountain Healthcare - Ogden, UT

## **2008 - Boise, ID**

Theme: *A Framework for Accountable Healthcare Governance*

Featured keynote speakers: Clint Maun, Jamie Orlikoff, Kathryn McDonagh, PhD, Michael Pugh

Chair: Margaret Soulen Hinson, Weiser Memorial Hospital - Weiser, ID

## **2009 - Albuquerque, NM**

Theme: *Managing the Winds of Change*

Featured keynote speakers: Keith Pryor, Mac McCrary, Joseph Bujak, MD

Chair: Larry Stroup, Presbyterian Healthcare Services - Albuquerque, NM

## **2010 - Denver, CO**

Theme: *Elevating the Standards of Hospital Governance*

Featured keynote speakers: John Nance, Rick Pollack, Larry Walker, Bill Ward

Chair: Steve Glasmann, Montrose Memorial Hospital - Montrose, CO

## **2011 - Omaha, NE**

Theme: *Riding the Rails Towards Governance Excellence*

Featured Keynote Speakers: Clint Maun, Joy Johnson Wilson, John Combs, MD, Jamie Orlikoff

Chair: John Klosterman, Butler County Health Care Center - David City, NE

## **2012 - Big Sky, MT**

Theme: *Daring to Lead: Governance in a Time of Change*

Featured keynote speakers: Tom Olivo, Maureen Swan, Timothy McDonald, MD, Mike Rock

Chair: Bina Eggensperger, Clark Fork Valley Hospital - Plains, MT

## **2013 - Park City, UT**

Theme: *Governance Excellence: The Power of Performance*

Featured keynote speakers: Lisa Kidder Hrobsky, Sean Patrick Murphy, Linda Galindo, Pamela Knecht

Chair: Eugene C. Beck, Sevier Medical Center - Richfield, UT

## **2014 - Henderson, NV**

Theme: *Healthcare: A High Stakes Business*

Featured keynote speakers: Bernice Washington, Daniel Sinnott, Brian Silverstein, Mike Rock

Chair: James G. Parrish, Humboldt General Hospital - Winnemucca, NV

## **2015 - Sun Valley, ID**

Theme: *Hospitals & Trustees: Partners in Success*

Featured keynote speakers: Barbara Reilly, Thomas Royer, Daniel Sinnott, Mike Rock

Chair: Mary Bateman, Bear Lake Memorial Hospital - Montpelier, ID

## Dedication and Success

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The basic program format of large group presentations complemented by pragmatic breakout sessions was part of the initial design and continues to be a successful educational delivery system to this day.

A social highlight is the evening event, which has become a tradition and reflects the uniqueness of the program location.

In addition to the breakout sessions, there has normally been a session entitled *The Trustee Toolkit*, which is specifically designed to help beginning trustees become acquainted with their responsibilities on a hospital board.

When the Western Regional Trustee Symposium (WRTS) was started in 1997, no thought was given to which hospitals would find the programs valuable and attend the sessions; however, the market niche into which the WRTS has evolved is the Critical Access Hospital and small rural hospital environment.

The success of the WRTS is largely due to a dedicated group of hospital association staff members and hospital trustees who have carried the initial concept — quality education at a reasonable price — forward. As proof of that goal, there was only one year when expenses exceeded revenue and positive comments relative to the program each year have been the norm. In recognition of an outstanding milestone in healthcare education, the Western Regional Trustee Symposium was selected as the 2015 Association of Association Educators (A<sup>2</sup>E) *Outstanding Achievement Award* recipient, the culmination of 18 years of hard work and dedication.

Maureen Boshier wrote in her welcoming letter to the first WRTS in 1997: *“Welcome to ‘Trustees in Transition’, the first regional trustee conference. We hope this meeting creates opportunities to network and learn together. The challenges facing trustees are both specific to each community and universal. A new perspective. A different vision, a sharper focus, perhaps a common mistake can be the basis for solid information to bring back to your community and your board room.”*

Her comments were a prologue to the future and have become a foundation for the programs. The continued efforts of the state associations and trustees involved with the WRTS guarantees its continued success in meeting the educational needs of hospital trustees now and in the years to come.

The Western Regional Trustee Symposium is a collaboration between:



[trusteesymposium.org](http://trusteesymposium.org)