



The 2025 APTA Private Practice Annual Conference Qualifies for a Maximum of 1.75 CEUs (17.5 Contact Hours/CCUs)

State Approvals

As a Component of the APTA, the APTA Private Practice's courses are accepted in the following jurisdictions, as allowed by the type of course requirements in state regulations: AL, AZ, AR, CO, CT, DC, DE, FL, GA, HI, IA, ID, IL, IN, KS, KY, LA, MD, MI, MN, MO, MT, NC, ND, NE, NH, NY, OR, PR, RI, SC, SD, TN, UT, VA, VT, WA, WI, WV, and WY.

APT A Private Practice is an Approved Provider through the California Physical Therapy Association (Provider # CPTAAP-35) and the Texas Physical Therapy Association (Provider #2610027TX).

This activity has been approved by the Ohio Physical Therapy Association (approval #25S2218), the New Jersey State Board of Physical Therapy Examiners (Approval #2508--37), and the New Mexico Board of Physical Therapy.

The State of Nevada Physical Therapy Board has approved this conference for a maximum of 17.5 continuing education credits.

Those in Oklahoma may apply individually for credit. Alaska and Pennsylvania do not accept credits for content related to practice management.

*The Premier Event
Designed for
Physical Therapy
Business Management*

Orlando, Florida
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Statement Regarding Relevance

The APTA Private Practice Annual Conference strives to provide the most current business management education available to Physical Therapists and their staff working in Private Practice. Conference speakers represent a wide variety of backgrounds, including practitioners, faculty in academic programs, researchers, and professional product vendors.

Conference attendees benefit from the section's focus in areas such as advocacy; education on practice management, business, marketing, and public relations; and legislative, regulatory, compliance, and payment policy. The content of this activity will cover areas from the APTA Code of Ethics Principles #4, #5, #6, #7, and #8.

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APTA Private Practice
2025 Annual Conference
and Exhibition
November 12-15, 2025



Target Audience & Educational Levels

The online Call for Proposal ask questions about the target audience and the level of presentation. The speaker determines the educational level for their proposal. The Program Work Group reviews the conference proposals for accuracy.

Prerequisites, educational level, and target audience are posted online on the conference schedule of events page.

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Annual Conference Schedule at a Glance

Wednesday, November 12, 2025			
8:30 AM - 2:00 PM	#PC: Kick-Starting Your Private Practice: A Day of Interactive Consulting (Separately Ticketed Event)	.5	5.0
1:00 PM - 2:00 PM	#101: Moneyball for Private Practices: Startup Tactics to Grow, Profit & Exit	.1	1.0
1:00 PM - 3:00 PM	#102: A Hands-On Workshop to Demystify Generative AI and Practical Applications for Everyday Use in PT Practices	.2	2.0
2:15 PM - 3:15 PM	#103: How We Added \$900k in Cash-Based Services to Our Physical Therapy Practice	.1	1.0
3:30 PM - 4:30 PM	#104: Arrivals Solve All Business Problems: Your Front Desk Sales Team Lead the Way	.1	1.0
4:45 PM - 5:15 PM	First-Time Attendees Meet & Greet		
5:30 PM - 7:30 PM	The Huddle: Business Updates & Welcome Reception		
Thursday, November 13, 2025			
8:00 AM - 10:00 AM	Morning Momentum: Breakfast, Industry Insights, Dicus Award Celebration & Keynote Kickoff		
Concurrent Sessions			
10:30 AM - 11:30 AM	#201: Adaptability: The Competitive Advantage in Rapidly Changing Healthcare	.1	1.0
10:30 AM - 11:30 AM	#202: Beating the Payers at their Own Games with APPEALS	.1	1.0
10:30 AM - 11:30 AM	#203: Case Studies in Employer Partnerships: From Big Tech to Small Practice Solutions <ol style="list-style-type: none"> 1. Doing Well While Doing Good: A Non-Profit Physical Therapy Success Story 2. Wading In: How Small Practices Can Partner on Prevention in Industry 	.1	1.0
10:30 AM - 11:30 AM	#204: Marketing Made Simple: Branding and Growth Strategies for PT Clinics on a Budget	.1	1.0
10:30 AM - 11:30 AM	#205: Navigating Compliance and IT Security: Essential Strategies for a Physical Therapy Clinic	.1	1.0
10:30 AM - 11:30 AM	#206: Revitalize Your Student Affiliation Program: The Future of Recruitment and Practice Success	.1	1.0
10:30 AM - 11:30 AM	#207: Specialty Networking Room: Pelvic PT		
11:30 AM - 1:30 PM	Lunch in the Exhibit Hall		
Concurrent Sessions			

1:30 PM - 2:30 PM	#208: Brave New Market: Navigating the Shifting Landscape of Rehab M&A in 2025-26	.1	1.0
1:30 PM - 2:30 PM	#210: Dollars & Sense: Billing Tips for Real Practice Owners	.1	1.0
1:30 PM - 2:30 PM	#211: Metrics, Mindset, and Momentum: Inspiring Growth Through Delegation and Trust	.1	1.0
1:30 PM - 2:30 PM	#212: Recruitment Reimagined: Leveraging Google for Jobs to Find, Attract, and Hire Top Talent	.1	1.0
1:30 PM - 2:30 PM	#213: The Path to Tax Efficiency	.1	1.0
1:30 PM - 2:30 PM	#214: Specialty Networking Room: Small Clinic Owners		
Concurrent Sessions			
3:00 PM - 4:00 PM	#215: Building Employee Well-being Programs: A Guide to Thriving Workplaces	.1	1.0
3:00 PM - 4:00 PM	#216: Building High-Performance Teams to Prevent Burnout	.1	1.0
3:00 PM - 4:00 PM	#217: Revolutionizing Physical Therapy: Leveraging AI for Efficiency, Care, and Growth	.1	1.0
3:00 PM - 4:00 PM	#218: Breaking the Cycle: Sustainable Growth Through Direct-to-Employer Strategies	.1	1.0
3:00 PM - 4:00 PM	#219: Think Big, Scale Bigger: Unlocking Your Business's Full Potential	.1	1.0
3:00 PM - 4:00 PM	#220: Year-Round Financial Management and Tax Planning for Private Practices	.1	1.0
3:00 PM - 4:00 PM	#221: Specialty Networking Room: Lifestyle Medicine		
4:00 PM - 6:00 PM	Evening Reception in the Exhibit Hall		
Friday, November 14, 2025			
8:30 AM - 10:30 AM	Power Hours with Exhibitors		
Concurrent Sessions			
10:30 AM - 11:30 AM	#301: Case Studies in Innovation: Empowering People Through Tech & Culture 1. Joy: A New Standard for Business Health and How to Use It 2. Scaling Innovation: Lessons from Team Rehab's AI Scribing Rollout	.1	1.0
10:30 AM - 11:30 AM	#302: Fierce Feedback: Enhancing Clinic Culture and Employee Retention Through Communication	.1	1.0
10:30 AM - 11:30 AM	#303: Getting Google's Attention: Can't-Miss Online Visibility Strategies for Your Local Clinic	.1	1.0
10:30 AM - 11:30 AM	#304: Leadership Transformed: Navigating from Command and Control to Mission Control	.1	1.0
10:30 AM - 11:30 AM	#305: The Legal Cases of Physical Therapists Vs. Payors: How and Why We Win	.1	1.0
10:30 AM - 11:30 AM	#306: What Every Owner Should Know About Exit Strategies and Practice Value	.1	1.0
10:30 AM - 11:30 AM	#307: Specialty Networking Room: Cash-Based		
11:30 AM - 1:30 PM	Lunch in the Exhibit Hall		
1:30 PM - 2:45 PM	The Playmakers: Team Up, Network & Celebrate Community Impact		
Concurrent Sessions			

3:15 PM - 4:15 PM	#307: Due Diligence: A Compliance Program Stress Test	.1	1.0
3:15 PM - 4:15 PM	#308: Making Your Performance Reviews Meaningful!	.1	1.0
3:15 PM - 4:15 PM	#309: Navigating Change: Effective Strategies for Rehab Therapy Leadership Transitions	.1	1.0
3:15 PM - 4:15 PM	#310: No Clinic is an Island: How a Single Location Island Practice Scaled with Digital PT	.1	1.0
3:15 PM - 4:15 PM	#311: Thriving in Private Practice 2.0: Cash, Out-of-Network, and Insurance Models Uncovered	.1	1.0
3:15 PM - 4:15 PM	#312: Specialty Networking Room: New Practice Owners		
Concurrent Sessions			
4:30 PM - 5:30 PM	#313: Clinic Design: Creating Functional, Memorable and Inspiring Spaces to Grow Your Brand	.1	1.0
4:30 PM - 5:30 PM	#314: From Scrambling to Strategic: Building a Therapist Recruitment Pipeline	.1	1.0
4:30 PM - 5:30 PM	#315: How Key Performance Indicators Link With Insurance Contract Negotiations To Drive Profits	.1	1.0
4:30 PM - 5:30 PM	#316: Maximize Your PT Practice Profits: Systems & Strategies for Financial Mastery	.1	1.0
4:30 PM - 5:30 PM	#317: Re-balancing the Provider/Client Relationship with D2C & Sustainability Strategies	.1	1.0
4:30 PM - 5:30 PM	#318: Transforming PT Practices with Remote Therapeutic Monitoring for Better Outcomes & Profits	.1	1.0
4:30 PM - 5:30 PM	#319: Specialty Networking Room: Direct-to-Employer		
6:00 PM - 10:00 PM	Closing Party!		
Saturday, November 15, 2025			
8:30 AM - 8:30 AM	Post-Game Breakfast		
Concurrent Sessions			
9:15 AM - 10:15 AM	#401: Cracking the Code: The Easiest Path to Improvement for Each Therapist "Type"	.1	1.0
9:15 AM - 10:15 AM	#402: How To Manage a Successful Front Desk Team Across Multi-Site Locations	.1	1.0
9:15 AM - 10:15 AM	#403: Interviewing for Truth: Uncovering Authenticity in the Hiring Process	.1	1.0
9:15 AM - 10:15 AM	#404: The Cash Pay Revolution: Innovative Payment Models in Physical Therapy	.1	1.0
10:30 AM - 12:30 PM	#405: The Winning Drive: 2026 Regulatory & Payment Updates + Conference Highlights with the President	.2	2.0

TOTAL

1.75 CEUs / 17.5 contact hours

Session Description, Learning Objectives, Content References

Wednesday, November 12, 2025

<p>8:30 am – 2:00 pm</p>	<p>#PC</p>	<p>Kick-Starting Your Private Practice: A Day of Interactive Consulting (separately ticketed event) Primary Speaker: Robert Worth, PT, DPT (Advanced Physical Therapy & Sports Medicine) co-speaker: Michelle Collie, PT, DPT, MS (Performance Physical Therapy), Josh D'Angelo, PT, DPT (MovementX), Paul J. Welk, PT, JD (Tucker Arensberg)</p> <p>.5 CEUs/ 5.0 contact hours</p> <p>Course Level: Beginner</p> <p>This interactive pre-conference session is designed to help new private practitioners gain the foundational knowledge and skills needed to start a private practice or take their existing private practice to the next level of success. guided by a team of experts sharing key information and tips on best practices, participants evaluate their practice to identify their greatest strengths, areas needing attention, and growth opportunities.</p> <p>Upon completion of this course, you will be able to:</p> <ul style="list-style-type: none"> • develop or enhance vision, mission, and short/long-term goals for future business; develop/enhance business plan including vision, executive summary, market analysis, marketing, service description, human resources, and facility layout/design. • describe how new practices can choose business structures that match state regulations, strategic vision, and financial plans for the organization. • create a marketing plan and define the needs of healthcare consumers that influence healthcare buying decisions. • identify areas of risk and opportunity within the business structure and systems, various types of contracts, and the basics of billing and collections, ranging from traditional fee-for-service insurance to bundled payment to cash-based to direct-to-employer contracting. <p>Content Reference:</p> <ol style="list-style-type: none"> 1. nielsen.nielsen annual report 2016.nielsen, 2016,https://sites.nielsen.com/yearinreview/2016/assets/pdfs/nielsen_annualreport_2016.pdf. accessed 1 feb.2025 2. health capital consultants.health capital topics.health capital press, llc,2022.https://www.healthcapital.com/hcc/newsletter/ebook/2022/health_capital_topics_holiday_book_2022.pdf.accessed 1 feb. 2025 3. contreras, darrell w., troklus, debbie, vacca, sheryl. hcca compliance 101, fifth edition. society ofcorporate compliance and ethics (scce) & health care compliance association (hcca),2022. 4. atske, sara. "social media use in 2021 pew research center." pew research center: internet, science &tech, 24 oct. 2023, www.pewresearch.org/internet/2021/04/07/social-media-use-in-2021. accessed 1 feb.2025 5. oppenheim, charles b, joseph, amy m., durie, benjamin a. ahla the stark law (ahla members):comprehensive analysis and practical guide. american health lawyers association, 2021.
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		<p>6. colletti, patrick. refounder: how transformational leaders take what’s broken and make it better. per capitapublishing, 2021.</p> <p>7. mgma datadive. mgma datadive provider compensation data.medical group management association.https://www.mgma.com/datadive/provider-compensation. accessed 1 feb. 2025</p>
<p>f1:00 PM – 2:00 PM</p>	<p>#101</p>	<p>Moneyball for Private Practices: Startup Tactics to Grow, Profit & Exit Primary Speaker: Paul Singh (StrataPT)</p> <p>.1 CEUs/ 1.0 Contact Hours</p> <p>Course Level: Intermediate</p> <p>Today, investors and buyers are looking for more and more opportunities in the Physical Therapy Practice space! Whether you’re a small single-site practice or a large multi-site practice looking for ways to grow, profit and possibly exit, this talk is for you.</p> <p>This presentation offers real-world examples of tactics and strategies that are directly applicable to the business management of physical therapy practices. These ideas are sourced from the presenter's direct investments into 3,200+ technology startups over the last two decades. This “real-world MBA” is THE playbook for building businesses in 2025.</p> <p>The attendees can expect an interactive session, complete with proven ideas that can be implemented immediately within their own businesses. These include Growth Tactics drawn from real-world examples, Profitability Strategies that optimize cash flow, a solid understanding of Exit Planning via sale, merger or other transactions and modern Business Management Techniques. While primarily designed for practice owners and executives, this presentation will provide actionable ideas and examples to clinicians, administrative and other staff. The result? A faster-growing, more profitable and, ultimately, better positioned business to exit.</p> <p>Upon completion of this course, you will be able to:</p> <ul style="list-style-type: none"> • Identify growth tactics and profitability strategies from successful tech startups that can be applied to managing physical therapy practices. • Explain the essential components of an effective exit strategy and how to position a business for a successful sale or transition. • Apply actionable ideas for improving team collaboration, operational efficiency, and patient engagement to foster a faster-growing and more profitable practice. <p>Content Reference:</p> <ol style="list-style-type: none"> 1. Bain & Company. Healthcare Private Equity Market 2024: Year in Review and Outlook. Accessed January 16, 2025, https://www.bain.com/insights/year-in-review-and-outlook-global-healthcare-private-equity-report-2025/ 2. Silicon Valley Bank. Healthcare Industry Trends: 2024 Annual Report. Accessed January 16, 2025, https://www.svb.com/trends-insights/reports/healthcare-investments-and-exits/ 3. Hyde Park Capital. Physical Therapy Market Insights: Spring 2024. Accessed January 16, 2025, https://hydeparkcapital.com/wp-content/uploads/2024/03/HPC-Physical-Therapy-Outlook-Spring-2024-UPDATED-7.1.24.pdf 4. Healthcare Dive. Healthcare venture capital investment amplified by AI in 2024. Accessed January 16, 2025, https://www.healthcaredive.com/news/healthcare-venture-captial-funding-ai-boost-2024-silicon-valley-bank/736870/ 5. Private Equity Stakeholder Project. Private Equity Health Care Acquisitions – July 2022. Accessed January 16, 2025, https://pestakeholder.org/news/private-equity-health-care-acquisitions-july-2022/

1:00 PM –
3:00 PM

#102

A Hands-On Workshop to Demystify Generative AI and Practical Applications for Everyday Use in PT Practices

Primary Speaker: Rich Kenny, MMCI, RN (Kenny & Associates Physical Therapy; Veritas Labs)

Co-Speaker: Lindsey Kenny, PT, DPT (Kenny & Associates Physical Therapy)

.1 CEUs/ 1.0 Contact Hours

Course Level: Intermediate

Meet your new business partner who won't ask for an equity position - Generative AI is ready to transform how you run your physical therapy practice. In this groundbreaking, hands-on workshop, discover how small practice owners can use AI to tackle their biggest operational challenges: from marketing and business development to staff training and workflow optimization. Through our innovative "prompt-a-thon" format, you'll learn to leverage free AI tools to operate your practice more efficiently and profitably, without specialized technical knowledge.

This isn't just another tech workshop - it's a practical business strategy session where you'll get hands-on prompting experience tackling real practice management challenges. Come see if AI is up to the tasks of:

- Developing strategic business plans and growth strategies
- Creating targeted marketing campaigns and content
- Drafting and optimizing operational policies and procedures
- Building staff training materials and resources
- Enhancing business analytics and reporting

Join us for this unique opportunity to gain a competitive advantage in practice management while developing practical skills you can implement immediately - no technical expertise required.

Upon completion of this course, you will be able to:

- Create effective AI prompts for common physical therapy practice needs through hands-on experimentation and team-based challenges
- Develop implementation strategies for using AI tools safely and ethically in healthcare settings
- Build a comprehensive prompt library for marketing, documentation, and patient education

Content Reference:

1. Noy, S., & Zhang, W. (2023). Experimental evidence on the productivity effects of Generative Artificial Intelligence. *Science*, 381(6654), 187–192. <https://doi.org/10.1126/science.adh2586>
2. Roser, M. (2022, December 6). The brief history of artificial intelligence: The world has changed fast – what might be next?. *Our World in Data*. <https://ourworldindata.org/brief-history-of-ai>
3. Hristidis, V., Ruggiano, N., Brown, E. L., Ganta, S. R., Stewart, S. (2023). Chatgpt vs google for queries related to dementia and other cognitive decline: Comparison of results. *Journal of Medical Internet Research*, 25. <https://doi.org/10.2196/48966>
4. Montero Guerra, J. M., Danvila-del-Valle, I., Méndez-Suárez, M. (2023). The impact of digital transformation on talent management. *Technological Forecasting and Social Change*, 188, 122291. <https://doi.org/10.1016/j.techfore.2022.122291>
5. Office of the Chief Information Officer (OCIO). (2023, August 13). Ai Use Cases Inventory. [HHS.gov. https://www.hhs.gov/about/agencies/asa/ocio/ai/use-cases/index.html](https://www.hhs.gov/about/agencies/asa/ocio/ai/use-cases/index.html). Accessed July 1, 2025
6. Coalition for Health AI. (2023, April 4). Blueprint for trustworthy AI implementation guidance and assurance for healthcare. https://www.coalitionforhealthai.org/papers/blueprint-for-trustworthy-ai_v1.0.pdf

<p>2:15 PM – 3:15 PM</p>	<p>#103</p>	<p>How We Added \$900k in Cash-Based Services to Our Physical Therapy Practice Primary Speaker: Stephen Rapposelli, PT (Performance Physical Therapy) Co-Speaker: Matt Phifer, PT (StretchPlex)</p> <p>.1 CEUs/ 1.0 Contact Hours</p> <p>Course Level: Advanced</p> <p>We grew our cash-based wellness services from 0 to \$900k in top line revenue in 3 years, making many mistakes along the way. This session will provide physical therapy practice owners with a comprehensive roadmap to successfully add profitable cash-based services to their business model. As healthcare trends evolve, many PT practices are turning to additional revenue streams like assisted stretching, personal training, and other services to increase their bottom line. Attendees will learn how to assess the viability of these services, integrate them seamlessly into their practice, and market them effectively to their target audience.</p> <p>Key takeaways will include practical strategies for pricing, marketing, staffing, and operational setup, along with how to design service packages that align with clients' needs. This session is designed for practice owners who are ready to diversify their revenue streams and build a sustainable, profitable business outside of traditional insurance-based services. Every PT owner should strongly consider adding this model to their existing business for a healthy profit.</p> <p>Upon completion of this course, you will be able to:</p> <ul style="list-style-type: none"> • Identify the right cash-based services to add to their physical therapy practice (e.g., assisted stretching, personal training) based on their client demographics and market demand. • Develop profitable pricing models and service packages that align with client needs and maximize revenue. • Create a comprehensive marketing strategy to attract clients for cash-based services using both digital and local outreach. • Implement operational changes to support the addition of new services, including staffing, scheduling, and client onboarding. <p>Content Reference:</p> <ol style="list-style-type: none"> 1. Cummings, T. M., & Gervais, M. (2021). The Evolution of Cash-Based Physical Therapy Models: Opportunities and Challenges. <i>Journal of Orthopedic & Sports Physical Therapy</i>, 51(6), 389-397. 2. Smith, J. A., & Davidson, R. E. (2019). Diversifying Revenue Streams in Outpatient Physical Therapy. <i>Journal of Private Practice</i>, 22(4), 124-130. 3. American Physical Therapy Association. (2020). Economic Value of Physical Therapy: U.S. Report. Accessed October 10, 2024, https://www.valueofpt.com/globalassets/value-of-pt/economic_value_pt_u.s_report_from_aptareport.pdf. 4. Patterson, E. L., & Willis, B. P. (2020). Integrating Wellness Programs into Physical Therapy Practices: A How-To Guide. <i>PT in Motion</i>, 31(2), 18-23. 5. Brown, R. L., & Thomas, K. J. (2022). Increasing Profitability Through Cash-Based Services in Physical Therapy. <i>Journal of Business Management in Healthcare</i>, 10(2), 142-150. 6. Doran, P. A., & Hayes, S. J. (2023). Leveraging Client Retention Strategies for Cash-Based Physical Therapy Services. <i>The Journal of Health and Wellness</i>, 15(3), 234-239.
<p>3:30 PM – 4:30 PM</p>	<p>#104</p>	<p>Arrivals Solve All Business Problems: Your Front Desk Sales Team Lead the Way Primary Speaker: Jerry Durham (Client Experience Company)</p> <p>.1 CEUs/ 1.0 Contact Hours</p> <p>Course Level: Intermediate</p>

It's time to embrace the most misunderstood word in healthcare: SALES!
Sales is essential to both patient and business success, and this course will show you how to adopt an *ARRIVE, PAY, and STAY* mindset to transform your physical therapy practice's front desk into a powerful sales hub.

This session focuses on the front desk's critical role in the sales process and equipping team members with the sales skills to guide patients seamlessly from their first phone call through the completion of a plan of care. This session will be Heavy on the HOW of Sales and will include mostly audience participation, with role playing and sales conversations.

No matter your clinical practice or payer model, sales-focused front desk operations are essential for keeping patients engaged and committed to their care plans. By connecting physical therapy principles with proven sales strategies, this session will demonstrate how your front desk team can increase patient arrivals, retention, and revenue. The result? Better clinical outcomes, stronger business performance, and a happier team.

While primarily designed for front desk staff, this course also provides valuable insights for practice managers and owners. Participants will leave with actionable tools to replace outdated scheduling practices with systems that increase patient arrivals, drive completed care plans, and ensure long-term profitability.

Upon completion of this course, you will be able to:

- Describe how sales-focused front desk interactions guide patients through their journey in your practice from initial phone call to completed plan of care.
- Develop effective communication strategies through role-playing exercises and conversations to improve patient arrivals and retention.
- Integrate a step-by-step sales process into your front desk operations to replace scheduling focused methods.
- Reproduce sales conversations that align front desk operations with physical therapy principles, driving improved patient success and business success

Content Reference:

1. Betancourt, Joseph R. "Perception is Reality, and Reality Drives Perception: No Time to Celebrate Yet." Journal of general internal medicine vol. 33,3 (2018): 241-242. doi:10.1007/s11606-017-4263-z
2. Poulter D, Miciak M, Durham J, Palese A and Rossettini G (2024) Don't be a nocebo! Why healthcare organizations should value patients' expectations. Front. Psychol. 15:1393179. doi: 10.3389/fpsyg.2024.1393179.
3. Crisafulli, B., Wasil, M., Singh, J., and Benoit, S. (2019). Managing patient expectations through understanding health service experiences. Br. J. Med. Pract. 12:a014
4. Cook, Chad E et al. "Providing value-based care as a physiotherapist." Archives of physiotherapy vol. 11,1 12. 20 Apr. 2021, doi:10.1186/s40945-021-00107-0
5. Torain MJ, Bennett GG, Matsouaka RA, Olsen MK, Yang H, Bolton JH, Johnson KS, Svetkey LP. The Patient's Point of View: Characterizing Patient-Level Factors Associated with Perceptions of Health Care. Health Equity. 2021 Jun 25;5(1):457-465. doi: 10.1089/heq.2021.0062. PMID: 34235371; PMCID: PMC8252902
6. Garcia, A.N., Cook, C.E., Lentz, T.A., Pergolotti, M., Ciccolella, B.M., Brozowsky, D., Hopwood, D. (2024). Predictors of Patient Experience for 89,205 Physical and Occupational Therapy Patients Seen for Musculoskeletal Disorders: A Retrospective Cohort Study. JOSPT Open. Advance publication. <https://doi.org/10.2519/josptopen.2024.0071>

<p>10:30 AM – 11:30 AM</p>	<p>#201</p>	<p>Adaptability: The Competitive Advantage in Rapidly Changing Healthcare Primary Speaker: Amy Lafko, MSPT, MBA (Cairn Consulting Solutions)</p> <p>.1 CEUs/ 1.0 Contact Hours</p> <p>Course Level: Intermediate</p> <p>The only thing constant in PT practice today is that it is changing, and changing rapidly. What worked in the past is proving ineffective today. The key to not only surviving change but thriving is ADAPTABILITY. Instead of trying to learn about the "next big thing" in technology or the "newest" strategy for payment, develop adaptability so that you can handle whatever is around the corner, including things we can't yet see. Stop chasing what's next and employ a playbook for adapting to anything.</p> <p>Don't get left behind. In this interactive session, participants will explore the 3 components of adaptability: ability, character, and environment. By understanding these 3 components, leaders can unlock adaptability in themselves and their team. This skill is the superpower to navigate change and uncertainty so that your practice can thrive. Learn to handle the inevitability of change and create an organization that breeds adaptability.</p> <p>Upon completion of this course, you will be able to:</p> <ul style="list-style-type: none"> • Define the components of adaptability to effectively respond to uncertainty. • Leverage practice exercises to raise individual adaptability quotient • Examine strategies to foster an adaptable culture within your organization. <p>Content Reference:</p> <ol style="list-style-type: none"> 1. Thornley, Ross. Decoding AQ: Adaptability Quotient. Independently published Sept 2022. 2. Ybarra, Osca. The skills that help employees adapt: Empirical validation of a four-category framework. PLoS One. 2023 Feb 24;18(2):e0282074. doi: 10.1371/journal.pone.0282074. PMID: 36827345; PMCID: PMC9955657. 3. Ellen Mc Loughlin, Anushree Priyadarshini, Adaptability in the workplace: Investigating the adaptive performance job requirements for a project manager, Project Leadership and Society, Volume 2, 2021, https://doi.org/10.1016/j.plas.2021.100012. Accessed Jan 8, 2025 4. Mankins, Michael. In Uncertain Times, the Best Strategy is Adaptability. Harvard Business Review. August 24, 2022. https://hbr.org/2022/08/in-uncertain-times-the-best-strategy-is-adaptability. Accessed Jan 8, 2025 5. Sony, M., & Mekoth, N. (2022). Employee adaptability skills for Industry 4.0 success: a road map. Production & Manufacturing Research, 10(1), 24–41. https://doi.org/10.1080/21693277.2022.2035281. Access Jan 8, 2025
<p>10:30 AM – 11:30 AM</p>	<p>#202</p>	<p>202 Beating the Payers at their Own Games with APPEALS Primary Speaker: Gwen Simons, Esq, PT (Simons & Associates Law, P.A.)</p> <p>.1 CEUs/ 1.0 Contact Hours</p> <p>Course Level: Intermediate</p> <p>Arbitrary and capricious denials are on the rise – both at the prior authorization and post-service stages. Payers know that providers will stop asking for visits if they can make prior authorization administratively burdensome enough. However, filing appeals doesn't have to be time-consuming. And when a critical mass of PTs embrace pushing appeals to the independent review level, it is very costly to the Payer and can make the Payer change their utilization review practices. This session will educate PTs and admins on the appeal laws that apply to commercial plans and Medicare Advantage Plans and how to use those laws to change payer business practices. Template appeal letters and</p>

sample policies and procedures will be provided to make appeals easy. We will also discuss how to file complaints with insurance regulators and CMS and get patients involved in the process. It's time to get a critical mass of PTs involved in pushing appeals to the independent external review level if we are going to change payer conduct!

Upon completion of this course, you will be able to:

- Understand the appeals laws and procedures under Medicare and the Affordable Care Act that apply to all commercial payers (fully insured and self-insured health plans) in every state.
- Know how to implement the right strategies for each level of appeal according to what laws apply so the appeals process can be efficient and easy.
- Know how to set up appeal templates for the most common types of appeals to make the process easy.
- Know how to engage your patients in your appeal and complaint efforts and who to direct your complaints to when the Payer violates the applicable laws.

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- 10. **Consumer Survey Highlights Problems with Denied Health Insurance Claims**, Karen Pollitz, Kaye Pestaina, Lunna Lopes, Rayna Wallace, and Justin Lo, Published: Sep 29, 2023 (accessed 7/17/2025 at <https://www.kff.org/affordable-care-act/issue-brief/consumer-survey-highlights-problems-with-denied-health-insurance-claims/>)
- 11. **Claims Denials and Appeals in ACA Marketplace Plans in 2021**, Karen Pollitz, Justin Lo, Rayna Wallace, and Salem Mengistu, Published: Feb 09, 2023 (accessed 7/17/2025 at <https://www.kff.org/private-insurance/issue-brief/claims-denials-and-appeals-in-aca-marketplace-plans/>)

10:30 AM – 11:30 AM

#203

Case Studies in Employer Partnerships: From Big Tech to Small Practice Solutions
 .1 CEUs/ 1.0 Contact Hours

Course Level: Beginner

Doing Well While Doing Good: A Non-Profit Physical Therapy Success Story

Primary Speaker: Lisa Flexner, PT, DPT, MA, (FlexHealth Consulting, LLC)

Join us for a case study on Treehouse Therapies, a non-profit pediatric interdisciplinary clinic in Central Oregon that has successfully integrated the professional values of physical therapy into a growing and sustainable organization. Since its founding in 2013, Treehouse Therapies has expanded from one clinic to five, serving Bend, rural communities, and the Confederated Tribes of Warm Springs' tribal lands.

Treehouse Therapies has achieved outstanding organizational results by focusing on the Quintuple Aim of healthcare: cost containment, patient experience and outcomes, population health, provider well-being, and health equity. This session will explore how Treehouse has maintained strong financials, high employee satisfaction, and exceptional patient outcomes, all while meeting the needs of underserved populations.

In examining this innovative business model, we'll discuss the demographics and financials that inspired Treehouse's model, the choices and tradeoffs that were made, and similar models being used in outpatient orthopedic practice.

This session is ideal for healthcare leaders interested in exploring business model innovation and building a patient-centered, financially sustainable clinical organization.

State the problem in your case study: How does one build a successful organization that serves a high-need population largely covered by low-payment insurers? How do you make sure kids and families had high-quality and team-based care, when the healthcare system isn't always set up for that. To give kids what they needed, Treehouse had to look different.

Explain your solution: Treehouse's innovative model combines a non-profit organization managing the facilities, equipment, and service offerings, with clinician compensation that supports autonomy and flexibility, creating wins for all stakeholders in the organization.

Upon completion of this course, you will be able to:

- Analyze the strategies that have enabled Treehouse Therapies to balance financial sustainability with high-quality patient care.
- Identify key factors contributing to high employee satisfaction and retention in a pediatric healthcare setting.
- Discuss the importance of a culture that prioritizes both patient and provider well-being for long-term organizational success.
- Recommend best practices for expanding clinical services to underserved populations while maintaining operational excellence.

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Wading In: How Small Practices can Partner on Prevention in Industry

Primary Speaker: Alison Hartman, DPT (Pro-Activity North Carolina)

Small private practices face large burdens in balancing the provision of quality care while meeting needs for financial thriving. Cuts on reimbursement, a competitive recruitment landscape, and the constant pressure to 'do more for less' can leave small practices that are the heart of our profession struggling. Meanwhile, employers are facing a musculoskeletal crisis within their workforces - employees suffering from preventable conditions costing the employer thousands in direct (healthcare spend) and indirect (productivity) costs. In this session, we will discuss how small private practices can become the 'hero' in this story by 'partnering in prevention' to help industries reduce their musculoskeletal burden, simultaneously freeing their practice of many of their own burdens.

State the problem in your case study: The problem is that many small private practices cannot afford to provide the quality of care that they were founded on due to continuous cuts in reimbursement and an increasingly competitive hiring landscape. This leaves small practices with the difficult choice of sacrificing quality for quantity or choosing an innovative model to make ends meet. While direct to employer models are gaining increasing attention as a solution, many have found that barriers to entry are taller than expected, and stepping into the space is not as simple as it sounds. Different rules and regulations to manage, significantly larger insurance coverages to add, and the drain of being on-demand 24/7 often keep small practices on the sidelines. However, with the right system and relationships in place, these are not insurmountable.

Explain your solution: By partnering with employers, small practices have the opportunity to diversify their portfolio and open up a new revenue stream that holds the perks of a 'cash based' model, but without having to market and retain 'cash based' clients 1:1. By engaging in business to business relationships that are mutually beneficial, small practices gain freedom to provide quality care, provide employees with fulfilling work (without the

administrative burdens contributing to burnout), and improve financial stability by opening up another revenue source.

Upon completion of this course, you will be able to:

- Make the business case for direct-to-employer musculoskeletal prevention for both an employer and small practice owner audience.
- Describe the key components of an employer-based prevention model across the four levels of prevention.
- Weigh the value of independent management of an employer contract vs. partnering with other practices already succeeding in this space.

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10:30 AM –
11:30 AM

#204

Grow Your Business - Proven Marketing Strategies

Primary Speaker: Arash Maghsoodi, DPT (The Prehab Guys)

Co-Speaker: Kinsey Carmichael (The Prehab Guys & Prehab Physical Therapy)

.1 CEUs/ 1.0 Contact Hours

Course Level: Intermediate

In today's competitive healthcare market, the success of physical therapy practices depends on innovative marketing strategies that connect with patients both online and in person. This session is tailored for physical therapists and practice owners who want to attract new patients, grow their business, and strengthen relationships with their ideal audience. Participants will explore a range of actionable marketing approaches designed to integrate digital and clinic-based tactics seamlessly. The session focuses on building authentic connections that drive trust and loyalty, ensuring patients discover, learn about, and choose your practice.

Key topics include:

- **Crafting Engaging Patient Stories:** Learn to develop authentic narratives that highlight your unique strengths, helping patients feel connected to your practice before their first visit.

- **Mastering Digital Marketing:** Gain strategies for creating high-impact social media campaigns, leveraging patient testimonials, and running effective digital ads to expand your online presence and attract more patients.
- **Fostering Local Connections:** Discover how to enhance community engagement through events, partnerships, and in-clinic experiences that build your reputation and drive local referrals.
- **Measuring Success:** Learn to track and analyze marketing performance using key metrics, ensuring continuous improvement and sustainable growth.
- **Establishing Scalable Systems:** Implement strategies to maintain consistent and effective marketing efforts across both digital and in-clinic platforms.

This session equips participants with a practical toolkit to elevate their marketing efforts, creating meaningful patient relationships and positioning their practice for long-term success in an evolving healthcare landscape.

Upon completion of this course, you will be able to:

- **Identify and Define Your Ideal Patient Audience** - you will be able to define your ideal patient profile by identifying key demographics, needs, and behaviors that inform your marketing strategies.
- **Design a Storytelling Framework for Patient Engagement** - You will be able to create authentic, patient-centered stories that serve as the foundation for building trust and fostering meaningful connections.
- **Develop and Implement Effective Digital Marketing Strategies** - Design and execute digital marketing campaigns, including social media content, search engine optimization, and online advertisements, to attract and engage patients
- **Leverage In-Person Marketing Tactics and Community Connections** - Build and strengthen relationships with physicians, community partners, and local organizations to enhance patient referrals and in-person engagement.
- **Measure and Optimize Marketing Efforts for Sustained Growth** - Analyze marketing performance using key metrics, refine tactics based on data insights, and implement scalable systems for consistent growth and success.

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10:30 AM –
11:30 AM

#205

Navigating Compliance and IT Security: Essential Strategies for a Physical Therapy Clinic

Primary Speaker: Jody Swearingen, PT, DPT (Business and Clinical Management Services (BCMS))

.1 CEUs/ 1.0 Contact Hours

Course Level: Intermediate

In this session, we will explore compliance and IT security aspects tailored for private practice owners and administrators. Key topics include data security and privacy, including the need for robust measures like encryption, access controls, and secure data storage to comply with HIPAA regulations. We will discuss how Electronic Health Records (EHR) systems meet compliance standards and support secure data handling. Regular audits, continuous monitoring, and security risk assessments will be highlighted as essential practices. The session will also cover the need for staff training to maintain data privacy and security protocols, along with developing comprehensive incident response plans. Additionally, we will address documentation and reporting requirements for demonstrating compliance during audits.

Upon completion of this course, you will be able to:

- Recognize the necessity of establishing a robust compliance program that integrates a comprehensive IT strategy to enhance patient care and clinic operations.
- Discuss the critical importance of data security and privacy in the clinic, emphasizing the need for proactive measures to ensure HIPAA compliance.
- Articulate strategies for staff involvement in mitigating compliance risks related to IT infrastructure and usage.
- Evaluate the risks associated with health IT systems to make informed decisions about implementing or modifying business systems within the clinic.

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10:30 AM –
11:30 AM

#206

Revitalize Your Student Affiliation Program: The Future of Recruitment and Practice Success

Primary Speaker: Holly Petersen, PT, DPT (8150 Advisors)

Co-Speaker: Charlene Challenger-Smith, PT, ATC (8150 Advisors)

.1 CEUs/ 1.0 Contact Hours

Course Level: Intermediate

Revitalizing your student clinical affiliation program is more critical than ever. In today's post-COVID landscape, with staffing challenges and shifting student expectations, it's time to rethink how we prepare the next generation of healthcare professionals. A standout clinical program isn't just education—it's an investment in your practice's future.

Align your clinical affiliation with your practice's goals, values, and mission to attract top talent and prepare students for long-term success. The benefits are clear:

- Build a pipeline of recruits aligned with your clinic's culture.
- Establish meaningful partnerships with universities.
- Enhance your reputation as a leader in education and mentorship.
- Achieve measurable ROI through reduced hiring costs and better-prepared hires.

A thriving program includes structured learning, mentorship, and innovative solutions, providing students with flexibility and hands-on experience in real-world settings.

Effective implementation starts with a solid plan that incorporates continuous feedback and adaptability to meet the needs of students, universities, and your team. Together, we can shape the future of healthcare education and build a workforce ready to excel.

Join us to create a dynamic clinical affiliation program that drives recruiting success, enhances student experiences, and supports your practice's long-term growth.

Upon completion of this course, you will be able to:

- Define the influence of COVID-19, staffing challenges, and current student needs to revamp /revitalize your student program.
- Analyze the benefits, value, and ROI of standout clinical programming using evidence-based criteria.
- Design a top-tier student clinical affiliation that aligns with practice recruiting goals, values, and mission.
- Plan and integrate strategies for implementing your student clinical program effectively.

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1:30 PM –
2:30 PM

#208

Brave New Market: Navigating the Shifting Landscape of Rehab M&A in 2025-26
Primary Speaker: Paul Martin, MPT, CSCS, CBI, M&AMI (Martin Healthcare Advisors)

.1 CEUs/ 1.0 Contact Hours

Course Level: Intermediate

The Rehab M&A market has entered uncharted territory. After the stalls and uncertainty of late 2024, a new reality has emerged: acquirers are recalibrating strategies, and sellers must navigate a more intricate and competitive environment. This session will guide you through the nuances of this “Brave New Market,” equipping you with the insights and tools needed to stand out and succeed. Drawing from exclusive conversations with top industry acquirers and a deep analysis of emerging trends, this presentation will cover:

- Recalibrating Expectations: How shifts in the economy, interest rates, and post-election policies are impacting deal structures and prices.
- Preparing for the Unexpected: Strategies to address delays and uncertainties with acquirers navigating behind-the-scenes hurdles like recaps and capital and debt access.
- Mapping the New Acquirer Ecosystem: Identifying emerging buyers, understanding their tendencies, and leveraging market intelligence to find your best match.
- Building Competitive Readiness: The essential elements of positioning your business as a top target in 2025.
- Unlocking Strategic Timing: When and how to engage the market to ensure the best outcomes.
- Leveraging Market Dynamics: The importance of cultivating multiple buyer relationships and how to drive competitive tension to increase value.
- Avoiding Deal Pitfalls: Understanding the red flags that are derailing deals in the current market.

This session is essential for private practice owners ready to tackle 2025’s challenges head-on and secure the best outcomes in a rapidly evolving M&A market. Walk away with actionable strategies to thrive in the year ahead.

Upon completion of this course, you will be able to:

- List key strategies for growing and scaling a rehabilitation business while creating long-term organizational value.
- Describe the process of preparing a rehabilitation business for a successful merger, acquisition, or partnership.
- Define the essential components of strategic planning and execution tailored to the rehabilitation industry.
- Demonstrate how to evaluate potential business partners to align with your goals and organizational culture.
- Explain the current trends and market conditions influencing M&A activity in the rehabilitation industry.

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1:30 PM – 2:30 PM	#210	<p>210 Dollars & Sense: Billing Tips for Real Practice Owners Primary Speaker: Kristen Wilson, PT, DPT (Action Potential)</p> <p>.1 CEUs/ 1.0 Contact Hours</p> <p>Course Level: Beginner</p> <p>Ever dream of a private practice where clients roll in like clockwork, hand over payment with a smile, and leave raving about you online? Sounds amazing, right? But let’s be real—getting paid (especially through insurance) isn’t always that smooth. If words like “billing” and “revenue cycle” make your eyes glaze over, you’re in the right place. In this fun and practical session, experienced practice owner Kristen Wilson takes the mystery out of getting paid. She’ll break down the Revenue Cycle Management process into bite-sized, totally doable steps, show you what actually matters when it comes to tracking your money, and help you build a system that makes sense—without the stress.</p> <p>Upon completion of this course, you will be able to:</p> <ul style="list-style-type: none"> • Define the components of revenue cycle management related to optimizing revenue • Identify 3-4 metrics to monitor on a monthly basis to ensure a healthy billing process • Implement tips for monitoring authorizations and other regulatory limitations affecting revenue • Create a process for regularly reviewing RCM reports including accountabilities for team members <p>Content Reference:</p> <ol style="list-style-type: none"> 1. Medicare Claims Processing Manual, Chapter 5, Part B Outpatient Rehabilitation and CORF/OPT Services. https://www.cms.gov/Regulations-and-Guidance/Guidance/Manuals/Downloads/clm104c05.pdf. Accessed 4/21/2025 2. Leonard, Robert. "Planning for Success: Identifying Top Metrics to Monitor in Your Strategic Plan." Impact Magazine, Nov. 2021, pp. 37–41. 3. Johnson, Brian, and David Zordich. "Strong from the Start: Set Up Your Practice and Control Your Bottom Line." Impact Magazine, Sept. 2021, pp. 36–40. 4. Rajgopal S. The Future of Healthcare Revenue Cycle Management: Challenges and Opportunities. Forbes May 2022. https://www.forbes.com/councils/forbesbusinesscouncil/2022/05/27/the-future-of-healthcare-revenue-cycle-management-challenges-and-opportunities/. Accessed 4/21/2025 5. J Clear. Atomic Habits: An Easy and Proven Way to Build Good Habits and Break Bad Ones. Avery Publishing. 2018.
1:30 PM – 2:30 PM	#211	<p>Metrics, Mindset, and Momentum: Inspiring Growth Through Delegation and Trust Primary Speaker: Jennifer Raams, PT (Practice Freedom U) Co-Speaker: Lindsay Keisman, LCPC, SPHR (Practice Freedom U)</p> <p>.1 CEUs/ 1.0 Contact Hours</p> <p>Course Level: Intermediate</p> <p>Many practice owners struggle with delegating effectively and trusting their teams to operate independently. These challenges often arise from psychological tendencies such as fear of failure, loss of control, perfectionism, and mistrust of team capabilities. This session will explore these intrinsic</p>

		<p>barriers and provide actionable, evidence-based strategies to overcome them, enabling practice owners to build high-performing teams in the physical therapy business environment. Through real-life stories and case studies, the speakers will share how shifting mindsets and implementing transparent performance metrics can help practice owners break free from the cycle of micromanagement, fostering greater staff engagement and trust.</p> <p>The session provides practical insights and tools to foster a culture of autonomy, collaboration, and empowerment. Participants gain strategies for leveraging data-driven approaches and accountability systems to drive sustainable growth.</p> <p>Upon completion of this course, you will be able to:</p> <ul style="list-style-type: none"> • Identify and understand psychological barriers to letting go of control in Physical Therapy practice management. • Describe practical tools and strategies to empower team members and build trust, fostering autonomy. • Utilize metrics to create a supportive, growth-oriented environment for both staff and clients. • Improve time management, and enhance overall well-being while achieving sustainable practice growth. <p>Content Reference:</p> <ol style="list-style-type: none"> 1. Stoller, M. L., & Klein, J. D. (2021). "Delegation and Trust in Healthcare Leadership: Understanding the Barriers and Strategies for Success." <i>Journal of Healthcare Management</i>, 44(3), 128–135. Examines mindset shifts and strategies for building collaborative and accountable teams in healthcare settings. 2. Lencioni, P. (2018). <i>The Five Dysfunctions of a Team: A Leadership Fable</i>. Jossey-Bass. Provides research-backed insights into common team obstacles, including trust, conflict, commitment, accountability, and results, which are essential for team delegation and leadership. 3. Bungay Stanier, M. (2018). <i>The Coaching Habit: Say Less, Ask More & Change the Way You Lead Forever</i>. Box of Crayons Press. Offers practical tools for effective delegation and empowering team members through coaching. 4. Goleman, D. (2018). <i>Emotional Intelligence: 2.0</i>. TalentSmart. Discusses how emotional intelligence, particularly self-awareness and self-regulation, improves team performance and engagement. Goleman, D. (2024). "Optimal Leadership and Emotional Intelligence." <i>Leader to Leader</i>, May 2024. 5. Macadam, S. (2019). <i>Leading by Design: How Everyone Can Create Extraordinary Change</i>. Business Expert Press. Explores leadership tools for effective delegation and team empowerment, supported by case studies. 6. Sullivan, D., & Hardy, B. (2021). <i>The Gap and The Gain: The High Achievers' Guide to Happiness, Confidence, and Success</i>. Hay House Business. Encourages a mindset shift to focus on progress rather than perfection, fostering growth-oriented team cultures. 7. Seligman, M. E. P. (2018). <i>Positive Psychology: Building Well-Being and Happiness</i>. Free Press. This book expands on the evidence-based research of foundational concepts of positive psychology, emphasizing how fostering optimism, resilience, and well-being can enhance leadership effectiveness and team collaboration.
1:30 PM – 2:30 PM	#212	<p>Recruitment Reimagined: Leveraging Google for Jobs to Find, Attract, and Hire Top Talent</p> <p>Primary Speaker: Neil Trickett, PT (Practice Promotions)</p> <p>.1 CEUs/ 1.0 Contact Hours</p> <p>Course Level: Intermediate</p>

		<p>In today's competitive job market, attracting top talent requires more than traditional recruitment methods. This session offers a fresh perspective on modern hiring practices by exploring the power of Google for Jobs and how to turn your practice's website into a recruitment hub. This will help practices create an alternative method to traditional Indeed, ZipRecruiter, and other job board sites and give a competitive advantage to clinics to attract top talent to them.</p> <p>This session will guide you through the essentials of optimizing your job postings to rank higher on Google for Jobs, helping you reach the right candidates faster. You'll learn actionable strategies for crafting compelling job descriptions, enhancing visibility through SEO best practices for Google for jobs, and aligning your recruitment process with the latest trends in candidate search behavior. Whether you're a small business owner, HR professional, or recruiter, this course will provide the tools and insights to:</p> <ul style="list-style-type: none"> • Navigate the Google for Jobs platform effectively. • Maximize the reach of your job postings. • Stand out in a crowded digital hiring landscape. <p>Upon completion of this course, you will be able to:</p> <ul style="list-style-type: none"> • Optimize Recruitment Strategies Using Google for Jobs - Learn how to create and optimize job posts to rank on Google for Jobs, ensuring maximum visibility to attract high-quality candidates. • Develop an Employer Brand to Attract Top Talent - Participants will gain the skills to showcase their organization's culture, benefits, and growth opportunities through targeted branding strategies. • Centralize Recruitment Efforts to Your Practice Website - Learn how to build and optimize careers and job posting pages on their website, to improve candidate experience. • Excite and Engage Candidates Throughout the Hiring Process -Develop strategies to craft compelling job descriptions, and create marketing materials that keep candidates engaged and motivated to join their organization. <p>Content Reference:</p> <ol style="list-style-type: none"> 1. Mediabistro. What's "Google for Jobs" and what do you need to know about it? https://www.mediabistro.com/employer/blog/news/whats-google-for-jobs-need-know/?utm_source=chatgpt.com. Accessed 6/12/2025. 2. Randstad Enterprise - March 13, 2019. The benefits of Google for Jobs for Employers. https://www.randstadenterprise.com/insights/randstad-enterprise-insights/the-benefits-of-google-for-jobs-for-employers-2/?utm_source=chatgpt.com. Accessed 6/12/2025. 3. Job Board Doctor. Sept 9, 2024. August 2024 Google Core Update: A Game-Changer for Online Recruiting in the US. https://www.jobboarddoctor.com/2024/09/09/august-2024-google-core-update-a-game-changer-for-online-recruiting-in-the-us/. Accessed 6/12/2025. 4. Joveo - Google for Jobs: The Ultimate Guide [2025]. https://www.joveo.com/google-for-jobs-the-ultimate-guide .Accessed 6/12/2025 . 5. Jobiak. March 21, 2023. Google for Jobs for Employers: Making a Complex Platform Simple. https://jobiak.ai/why-employers-are-struggling-with-google-for-jobs/. Accessed 6/12/2025.
1:30 PM – 2:30 PM	#213	<p>The Path to Tax Efficiency Primary Speaker: Tom Hicks (J.T. Hicks & Company)</p> <p>.1 CEUs/ 1.0 Contact Hours</p> <p>Course Level: Intermediate</p> <p>This session equips private physical therapy practice owners and managers with critical knowledge to achieve maximum tax efficiency while strengthening their financial strategies. Participants will gain</p>

		<p>insights into selecting the best business entity for their practice by exploring distinctions and advantages between Single-member LLCs, Multi-member LLCs, Partnerships, and Corporations.</p> <p>Attendees will also discover strategies to minimize tax liabilities while maximizing shareholder benefits, uncovering which entity structures yield the lowest taxes and highest returns. Beyond structural choices, the session delves into leveraging fringe benefits effectively. Participants will learn how to incorporate benefits such as medical plans, HSAs, FSAs, travel, automobiles, and home offices to unlock significant tax savings—strategies used by top CEOs to reduce their tax burden.</p> <p>Finally, the session addresses retirement planning tailored for private practice owners, detailing how to maximize savings and optimize plans like SIMPLE, SEP-IRAs, 401(k)s, and Solo 401(k)s for a prosperous future. By bridging the gap between tax strategy and practice management, this session empowers physical therapy professionals to enhance their financial outcomes and position their businesses for long-term success.</p> <p>Upon completion of this course, you will be able to:</p> <ul style="list-style-type: none"> • Evaluate and select the most tax-efficient business entity for their physical therapy practice. <ul style="list-style-type: none"> • Overview of business entity types. • Key tax implications/advantages. • Criteria for determining entity structure. • Identify/implement tax-saving strategies using fringe benefits to reduce taxable income while maximizing employee and owner benefits. <ul style="list-style-type: none"> • Explanation of benefits. • Tax advantages/compliance requirements. • Examples of integrating benefits • Design a tax-efficient retirement strategy using options tailored to their practice’s needs. <ul style="list-style-type: none"> • Comparison of retirement plans. • Steps to calculate and maximize contributions. • Long-term benefits of retirement planning. <p>Content Reference:</p> <ol style="list-style-type: none"> 1. IRS Publication 334: Tax Guide for Small Business (For Individuals Who Use Schedule C or C-EZ). Internal Revenue Service. Updated annually. Accessed January 17, 2025, https://www.irs.gov/forms-pubs/about-publication-334 . 2. IRS Publication 560: Retirement Plans for Small Business. Internal Revenue Service. Updated annually. Accessed January 17, 2025, https://www.irs.gov/forms-pubs/about-publication-560 3. Gurley-Calvez, Tami, and Brian T. Slade. "Small Business Tax Compliance Burden." Small Business Economics, vol. 52, no. 3, 2019, pp. 441–459. https://doi.org/10.1007/s11187-018-0038-8. 4. Feldman, Sheri B., and Henry A. Welfeld. "Maximizing Tax Benefits Through Fringe Benefits in Small Businesses." Journal of Financial Planning, vol. 32, no. 5, 2020, pp. 28–36. 5. IRS Choosing a Business Structure. Internal Revenue Service. Last reviewed or updated October 2023. Accessed January 17, 2025, https://www.irs.gov/businesses/small-businesses-self-employed/choosing-a-business-structure. 6. Collins, Julie H., and Douglas A. Shackelford. "Corporate Deductions and Tax Policy for Employee Benefits." National Tax Journal, vol. 73, no. 2, 2020, pp. 343–369. https://doi.org/10.17310/ntj.2020.2.06. 7. Wolters Kluwer. "Fringe Benefits: Tax Considerations for Employers and Employees." Tax Briefings & Alerts. 2022. Accessed January 17, 2025, https://www.wolterskluwer.com.
3:00 PM – 4:00 PM	#215	<p>Building Employee Well-being Programs: A Guide to Thriving Workplaces</p> <p>Primary Speaker: Lisa Flexner, PT, DPT, MA (FlexHealth Consulting, LLC)</p> <p>Co-Speaker: Stephanie Weyrauch, PT, DPT, MS (MovementX)</p>

.1 CEUs/ 1.0 Contact Hours

Course Level: Intermediate

Employee well-being is no longer just a buzzword—it's a business imperative. In this interactive session, attendees will learn why optimizing employee well-being programs to improve workplace engagement and increase retention boosts productivity. Through a blend of expert insights and a real-world case study, we will showcase actionable strategies for designing and implementing effective well-being initiatives. This session will discuss the framework and operational steps to create these programs while highlighting their financial and cultural benefits. Attendees will leave equipped with tools to develop their own tailored solutions that align with organizational goals and values.

Upon completion of this course, you will be able to:

- Discuss the essential components of an employee well-being program tailored to private practices.
- Identify cost-effective strategies to integrate well-being initiatives into daily operations.
- Analyze the long-term business impact and evidence supporting employee well-being programs.
- Formulate actionable steps to develop and measure the success of these programs in your practice.

Content Reference:

1. Committee on Systems Approaches to Improve Patient Care by Supporting Clinician Well-Being, National Academy of Medicine, & National Academies of Sciences, Engineering, and Medicine. (2019). Taking action against clinician burnout: A systems approach to professional well-being. National Academies Press. <https://doi.org/10.17226/25521>
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3. DeChant, P. F., Acs, A., Rhee, K. B., Boulanger, T. S., Snowdon, J. L., Tutty, M. A., Sinsky, C.A., & Thomas Craig, K. J. (2019). Effect of organization-directed workplace interventions on physician burnout: A systematic review. *Mayo Clinic Proceedings: Innovations, Quality & Outcomes*, 3(4), 384–408. <https://doi.org/10.1016/j.mayocpiqo.2019.07.006>
4. Maslach, C., & Leiter, M. P. (2022). *The burnout challenge: Managing people's relationships with their jobs*. Harvard University Press.
5. Office of the Surgeon General. (2022). Addressing health worker burnout: The U.S. Surgeon General's advisory on building a thriving health workforce. Accessed January 16, 2025, <https://www.hhs.gov/surgeongeneral/priorities/health-worker-burnout/index.html>
6. Patel, R. M., & Bartholomew, J. (2021). Impact of job resources and job demands on burnout among physical therapy providers. *International Journal of Environmental Research and Public Health*, 18(23), 12521. <https://doi.org/10.3390/ijerph182312521>
7. Shanafelt, T. D., & Noseworthy, J. H. (2017). Executive leadership and physician well-being: Nine organizational strategies to promote engagement and reduce burnout. *Mayo Clinic Proceedings*, 92(1), 129–146. <https://doi.org/10.1016/j.mayocp.2016.10.004>
8. Shanafelt, T. D., West, C. P., Sinsky, C., Trockel, M., Tutty, M., Wang, H., & Dyrbye, L. N. (2022). Changes in burnout and satisfaction with work-life integration in physicians and the general US working population between 2011 and 2020. *Mayo Clinic Proceedings*, 97(3), 491–506. <https://doi.org/10.1016/j.mayocp.2021.09.003>

		<p>9. Townsley, A. P., Li-Wang, J., & Katta, R. (2023). Healthcare workers' well-being: A systematic review of positive psychology interventions. <i>Cureus</i>, 15(1), e34102. https://doi.org/10.7759/cureus.34102</p>
3:00 PM – 4:00 PM	#216	<p>Building High-Performance Teams to Prevent Burnout Primary Speaker: Jason Collin, PT (PT Revolution)</p> <p>.1 CEUs/ 1.0 Contact Hours</p> <p>Course Level: Intermediate</p> <p>In today's fast-paced healthcare environments, physical therapy leaders must move beyond surface-level solutions and create high-performing teams that thrive, not just survive. This presentation introduces the High-Performance Team Effect (HPTE) framework—developed from leadership research and practical experience in the field. By focusing on clarity, connection, and communication, this session delivers powerful, evidence-based strategies to prevent burnout, boost team engagement, and ignite a culture of well-being and excellence. Whether you're managing a small clinic or leading across a health system, you'll leave with actionable tools to transform team dynamics and drive sustainable, positive change.</p> <p>Upon completion of this course, you will be able to:</p> <ul style="list-style-type: none"> • Identify and evaluate at least three key drivers of burnout and articulate their impact on team engagement and performance. • Apply at least three leadership strategies from the HPTE framework to improve team clarity, foster connection, and enhance team communication. • Create a plan incorporating one tool or strategy for each core competency to reduce burnout and increase team engagement. <p>Content Reference:</p> <ol style="list-style-type: none"> 1. Afrahi, B., Blenkinsopp, J., de Arroyabe, J. C. F., & Karim, M. S. (2022). Work disengagement: A review of the literature. <i>Human Resource Management Review</i>, 32(2). https://doi.org/10.1016/j.hrmr.2021.100822 2. Alexander, D., & Powell, J. (2018). Tips to retain clinical talent through high-performance teams. <i>Medical Economics</i>, 95(3), 26. 3. Bakker, A. B. (2022). The social psychology of work engagement: State of the field. <i>Career Development International</i>, 27(1), 36–53. 4. Bosak, J., Kilroy, S., Chênevert, D., & Flood, P. C. (2021). Examining the role of transformational leadership and mission valence on burnout among hospital staff. <i>Journal of Organizational Effectiveness: People and Performance</i>, 8(2), 208–227. 5. Briggs, M. S., Weber, M. D., Olson-Kellogg, B. J., DeWitt, J. J., Hensley, C. P., Harrington, K. L., Kidder, M. S., Farrell, J. P., & Tichenor, C. J. (2022). Factors contributing to physical therapists' job and career satisfaction in the United States: Results from a national survey. <i>Journal of PT Education</i>, 36(3), 232–241. https://doi.org/10.1097/jte.000000000000244 6. Cantu, R., Carter, L., & Elkins, J. (2022). Burnout and intent-to-leave in physical therapists: A preliminary analysis of factors under organizational control. <i>Physiotherapy Theory and Practice</i>, 38(13), 2988–2997. https://doi.org/10.1080/09593985.2021.1967540 7. Dyrbye, L. N., Major-Elechi, B., Hays, J. T., Fraser, C. H., Buskirk, S. J., & West, C. P. (2020). Relationship between organizational leadership and health care employee burnout and satisfaction. <i>Mayo Clinic Proceedings</i>, 95(4), 698–708.
3:15 PM – 4:15 PM	#217	<p>Revolutionizing Physical Therapy: Leveraging AI for Efficiency, Care, and Growth Primary Speaker: Roshan Nanu, PhD (Prompt Therapy Solutions) Co-Speaker: Ben Carlson (Carlson ProCare)</p> <p>.1 CEUs/ 1.0 Contact Hours</p>

Course Level: Intermediate

AI is revolutionizing healthcare, and physical therapy is no exception. In this session, we will explore how AI can be thoughtfully leveraged to reduce administrative burdens, improve staff efficiency, enhance patient care, and inform business decisions. Participants will learn about the benefits of transitioning from input-based to review-based AI clinical workflows—empowering clinicians to use their expertise for validation, not manual data entry, and save valuable time to put toward patient care.

Attendees will also gain insights into how AI tools can streamline operations, optimize biller time, minimize manual work at the front desk, and keep schedules full through smart scheduling solutions. Looking ahead, this session will provide a roadmap for integrating AI into practice operations today while envisioning its transformative potential for physical therapy over the next decade.

Upon completion of this course, you will be able to:

- Define how AI can revolutionize outpatient rehab operations by streamlining administrative tasks, optimizing patient care workflows, and enhancing business planning strategies.
- Recognize the benefits of review-based clinical AI workflows to reduce operational inefficiencies, improve clinician productivity, and enhance patient satisfaction.
- Identify the role of AI in driving financial sustainability through smarter resource allocation, revenue cycle optimization, and data-driven decision-making.
- Evaluate and implement AI tools that align with clinical and business priorities to foster growth and innovation in the outpatient rehab space.

Content Reference:

1. Alsobhi M, Khan F, Chevidikunnan MF, Basuodan R, Shawli L, Neamatallah Z. Physical Therapists' Knowledge and Attitudes Regarding Artificial Intelligence Applications in Health Care and Rehabilitation: Cross-sectional Study. *J Med Internet Res.* 2022;24(10):e39565. doi:10.2196/39565. Accessed December 18, 2024. <https://www.ncbi.nlm.nih.gov/pmc/articles/PMC9634519/>
2. Alsobhi M, Sachdev HS, Chevidikunnan MF, Basuodan R, Kumar DKU, Khan F. Facilitators and Barriers of Artificial Intelligence Applications in Rehabilitation: A Mixed-Method Approach. *Int J Environ Res Public Health.* 2022;19(23):15919. doi:10.3390/ijerph192315919. Accessed December 18, 2024. <https://pubmed.ncbi.nlm.nih.gov/36497993/>
3. Shawli, L., Alsobhi, M., Chevidikunnan, M. F., Rosewilliam, S., Basuodan, R., & Khan, F. (2024). Physical Therapists' Perceptions and Attitudes towards Artificial Intelligence in Healthcare and Rehabilitation: A Qualitative Study. *Musculoskeletal Science and Practice*, 73, 103152. <https://doi.org/10.1016/j.msksp.2024.103152>
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3:00 PM –
4:00 PM

#218

Breaking the Cycle: Sustainable Growth Through Direct-to-Employer Strategies
Primary Speaker: Tim Spooner (Spooner; Solveglobal)

	<p>Co-Speaker: Matthew VanderKooi, PT, MS (New Life Physical Therapy and Sports Medicine/ Solveglobal)</p> <p>.1 CEUs/ 1.0 Contact Hours</p> <p>Course Level: Intermediate</p> <p>The demand for direct-to-employer services has never been greater, yet the industry faces a critical challenge: traditional reimbursement models, including the fee-per-hour structure in direct-to-employer arrangements and the fee-for-service approach employed by insurance companies, fail to capture the true value that physical therapists bring to healthcare. These models drive private practices toward unsustainable workloads, reduced reimbursement, and diminished outcomes. This session, led by the Speaker and the Speaker, offers a comprehensive roadmap to escape the race to the bottom. Discover innovative strategies for building mutually beneficial direct-to-employer relationships that prioritize quality care, fair compensation, and financial sustainability. The Speaker and the Speaker will share actionable insights from their decades of experience, highlighting proven methods to reduce reliance on insurance reimbursements, optimize therapist capacity, and align care delivery with the real impact of physical therapy.</p> <p>Attendees will leave with the tools, confidence, and mindset shift needed to create direct partnerships that foster long-term growth, improve patient outcomes, and position their practices as indispensable partners in workplace health.</p> <p>Upon completion of this course, you will be able to:</p> <ul style="list-style-type: none"> • Identify the limitations of fee-per-hour models and their impact on practice sustainability. • Learn how to build and maintain direct-to-employer partnerships that align financial and patient care goals. • Develop strategies to proactively identify musculoskeletal (MSK) issues in workplace populations. • Understand how to transition from a reactive to a proactive approach in practice management. • Gain tools for presenting the value of direct-to-employer solutions to stakeholders effectively. <p>Content Reference:</p> <ol style="list-style-type: none"> 1. Makary, Marty. Blind Spots: How to Make Better Decisions in a Complex World. Bloomsbury Publishing, 2023. 2. Orth, Matt. Save Your Company: Strategies for Navigating Today’s Healthcare Landscape. Health Rosetta Publishing, 2022. 3. Chase, Dave. The CEO’s Guide to Restoring the American Dream. Health Rosetta Publishing, 2020. 4. Christensen, C.M., et al. The Innovator’s Prescription: A Disruptive Solution for Health Care. McGraw Hill, 2021 (Updated Edition). 5. Rosenthal, Elisabeth. An American Sickness: How Healthcare Became Big Business and How You Can Take It Back. Penguin Books, 2018.
<p>3:00 PM – 4:00 PM</p>	<p>#219</p> <p>Think Big, Scale Bigger: Unlocking Your Business’s Full Potential</p> <p>Primary Speaker: Kennedy Hawkins, MBA,JD, LLM (Kennedy Hawkins Consulting)</p> <p>.1 CEUs/ 1.0 Contact Hours</p> <p>Course Level: Intermediate</p> <p>Many physical therapy practice owners and leaders understand the benefit of growing their business. Some of the benefits are increased revenue, a bigger geographic footprint, the ability to attract top talent, increased efficiencies and economies of scale, and greater enterprise value as part of an exit</p>

		<p>strategy. Only 1.9% of businesses scale to 100+ employees. One of the main reasons is they lack the tools and plan to do so. In this session, participants will learn the strategies and tactics to scale their physical therapy practice. The strategies and tactics will cover such topics as the overall growth plan, recruiting talent, expansion cash flow, operational infrastructure, and developing beneficial relationships.</p> <p>The session will be interactive, with opportunities to engage the material presented. You will learn from a speaker who took a few “mom & pop” locations and grew it to 32 service locations, including outpatient clinics, hospitals, minor league sports teams, high schools, assisted living facilities, and universities. The group became one of the largest independent outpatient physical rehabilitation companies in their state. The company received acclaim at the local, state, and national levels. As part of the speaker’s exit strategy, a large national physical therapy company bought into the group and helped continue the company’s growth. Participants will tap into the speaker’s 30+ years of healthcare experience working with organizations small and large across the country. Participants will leave the session with tangible steps that will put them on the path to scaling their business and unlocking its full potential.</p> <p>Upon completion of this course, you will be able to:</p> <ul style="list-style-type: none"> • Understand why most businesses struggle to scale • Discover the benefits of scaling your business and adopting a “Think Big” mentality • Learn the strategies, tactics, and mindset needed to scale your business and unlock its potential • Analyze how to overcome the common obstacles that will arise as you scale your business <p>Content Reference:</p> <ol style="list-style-type: none"> 1. Harnish, Verne. Scaling up: How to Build a Meaningful Business. And Enjoy the Ride. Select Books Inc, 2018. 2. Govindarajan, Vijay, Lev, Baruch, Srivastava, Anup, Enache, Luminita, The Gap Between Large and Small Companies Is Growing. Why?, Harvard Business Review, August 16, 2019 3. Twomey, Colin, Over Half of Small Businesses Are Struggling to Grow But These 5 Solutions Can Help, Entrepreneur, December 9, 2024, https://www.entrepreneur.com/growing-a-business/over-half-of-small-businesses-are-struggling-to-grow/482623. Accessed 6/12/2025 4. Furr, Susannah Harmon, Kay, John, It’s Time to Reimagine Scale, Harvard Business Review, November 22, 2024, https://hbr.org/2024/11/its-time-to-reimagine-scale. Accessed 6/12/2025 5. Morrison, Zach, Scaling Your Business Is Hard Scaling Your Culture Is Even Harder. Here's How to Grow Both Without Losing Your Way, Entrepreneur, December 16, 2024, https://www.entrepreneur.com/leadership/how-to-navigate-the-complexities-of-scaling-your-workplace/483918. Accessed 6/12/2025
3:00 PM – 4:00 PM	#220	<p>Year-Round Financial Management and Tax Planning for Private Practices Primary Speaker: Kevin Reynolds, CPA (Healthcare Accounting Solutions, LLP) Co-Speaker: David Light, PT, DPT, MBA, MTC (Healthcare Accounting Solutions, LLP)</p> <p>.1 CEUs/ 1.0 Contact Hours</p> <p>Course Level: Advanced</p> <p>This session addresses best practices for financial and managerial accounting integrated with income tax strategies. Starting with the basics of how the financial platform and reporting should be designed at the chart of accounts level, electronic data integrations, monthly account reconciliations, and other closing procedures, and ending with a discussion of preparing for due diligence in a private equity transaction. Topics will also include cash vs. accrual accounting methods and how AI tools can</p>

help with efficiency. Real-life practice examples will be utilized to help illustrate. The session will include tips on maximizing communication methods with accounting professionals.

Upon completion of this course, you will be able to:

- Gain a comprehensive understanding of financial platform best practices.
- Analyze and interpret the relationship between financial reporting (Income Statement, Balance Sheet, and Cash Flows).
- Run your practice in a “pre due diligence” mindset to optimize the earnings multiple on an exit event.
- Enhance your knowledge of tax strategies and year-round planning to mitigate liability.

Content Reference:

1. LBMC. “Four Key Considerations for the Future of Healthcare Financial Management.” (Jan 10,2025). Accessed January 15, 2025, <https://www.lbmc.com/blog/healthcare-financial-management/>.
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7. Palko, Ryan, “M&A Transactions: The Value of Sell-Side Tax Diligence.” The Tax Adviser, (August 2023 issue).
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Friday, November 14, 2025

10:30 AM –
11:30 AM

#301

Case Studies in Innovation: Empowering People Through Tech & Culture

.1 CEUs/ 1.0 Contact Hours

Course Level: Beginner

Joy: A New Standard for Business Health and How to Use It

Primary Speaker: Lori Dillon, MPA (Therapeutic Associates)

In 2022, we recognized that our company and our world was dramatically impacted by the pandemic, the demand for our services was accelerating rapidly and, at the same time, we couldn't hire PTs fast enough and our people were, frankly, burnt out. We needed to focus on the emotional well-being of our teammates and we needed to take that focus seriously. This led to developing a process for turning something "mushy" into something measurable. We have now taken the first steps in understanding how to measure, track, and refine the ineffable through leveraging a rigorous scientific process. Since implementing our solution we have been able to track steady growth in our employee's individual and aggregated "joy scores", leading us towards a greater understanding of how we may craft organizational

structures and policies to foster joy in work throughout the company, and empower individual leaders to cultivate joy within their own teams. The next portion of our journey is to evolve our model and continuously improve our joy in work. Over the last year, we have refined and evolved our process to better reflect our organization and employees. During this session, attendees will learn about how they can develop and customize their own Joy in Work surveys to align with their unique cultures. As a result, attendees should be able to implement these surveys to calculate a baseline "joy score" and track progress over time.

State the problem in your case study: How can we meaningfully measure joy in work using a reliable scientific approach?

Explain your solution: Supported by documented research in healthcare and other industry environments, we embarked upon an 18-month experiment where we:

1. Analyzed scientific studies and workplace findings related to happiness, well-being, and employee engagement. Common themes were identified, particularly those highlighting the interplay between individual fulfillment and organizational culture
2. From this research, six constructs of joy were defined, representing critical dimensions of workplace joy:
 1. Meaning: The alignment of work with personal values and a sense of purpose;
 - Caring: Empathy and compassion expressed towards colleagues, clients, and oneself;
 - Value/Connections: The feeling of contributing to a greater mission and forming meaningful connections with others;
 - Learning: Opportunities for growth, skill development, and a sense of mastery in one's role;
 - Feedback: The quality and frequency of performance feedback and opportunities to share feedback with others;
 - Work Environment: The physical, social, and cultural aspects of the workplace that shape daily experiences.
2. For each construct, 2-3 targeted survey questions were developed to capture the essence of each dimension. These questions formed the basis of a 15-question survey distributed across the organization.
3. Responses from the survey were analyzed using a structural equation model, which synthesized the data into a single, actionable Joy in Work Score.
4. Consistently measured (quantitative and qualitative) Joy in Work to track progress over time.

As the adage goes, "What gets measured gets managed." The Joy in Work Score provides a structured and data-driven approach to understanding the nuanced dimensions of employee experience that drive joy. By regularly administering the survey and analyzing the results, organizations can identify strengths, pinpoint areas for improvement, and track progress over time. Measuring joy isn't just about gathering data—it's about fostering self-awareness at the organizational level. It allows leaders to move beyond assumptions and gut feelings about workplace culture to rely on concrete insights. This clarity enables focused action, ensuring that strategies for enhancing workplace joy are both relevant and impactful.

Upon completion of this course, you will be able to:

- Use a tested approach to measuring Joy in Work by understanding the foundational constructs and methodology underlying the approach and adapt them in service to your own organization
- Identify possible constructs for measuring Joy in Work for your people and culture
- Develop "joy surveys" so that you may begin your organizational journey towards evaluating and analyzing your own employee culture, and use this data to measure the effectiveness of your journey
- Appreciate the importance of devoting time and energy to measuring and improving Joy in Work

Content Reference:

1. Institute for Healthcare Improvement (IHI) Workforce Wellbeing and Joy in Work Study: <https://www.ihl.org/improvement-areas/workforce-well-being-joy-in-work>
2. Rutledge, et al. Hospital Nurse Perceptions of Meaning and Joy in Work. Journal of Nursing Measurement, 2018
3. Kung Y-T, Chi S-C, Chen Y-C, Chang C-M. Using Residual Dynamic Structural Equation Modeling to Explore the Relationships among Employees' Self-Reported Health, Daily Positive Mood, and Daily Emotional Exhaustion. Healthcare. 2021; 9(1):93. <https://doi.org/10.3390/healthcare9010093>
4. Modaresnezhad, Minoo, et al. Anxiety, job satisfaction, supervisor support and turnover intentions of mid-career nurses: A structural equation model analysis, Journal of Nursing Management, 2020
5. Jena, L. K., & Pradhan, S. (2017). Joy at work: Initial measurement and validation in Indian context. The Psychologist-Manager Journal, 20(2), 106–122
6. Outi Kanste, Work engagement, work commitment, and their association with well-being in health care. Journal of Advanced Nursing, 2011.

Scaling Innovation: Lessons from Team Rehab's AI Scribing Rollout

Primary Speaker: Nick Weber, MSPT, ATC (Team Rehab)

.1 CEUs/ 1.0 Contact Hours

Selecting a new technology is just the first step in the change management journey—a process that many rehab therapy organizations find both complex and daunting. The real challenges often surface after the decision is made, during the rollout and integration, as organizations encounter unexpected workflow disruptions, resistance, and hesitancy from staff. But what does successful adoption look like? How can organizations foster engagement and achieve measurable results?

This session tells the story of Team Rehab's experience as they adopted and implemented AI scribing across the organization. Faced with the growing documentation burden on its rehab therapists, Team Rehab embarked on a mission in 2024 to find a solution that would alleviate these challenges. After thorough research, demonstrations, and pilot testing, they chose an AI scribing tool to streamline workflows and empower over 500 therapists. The result? A successful implementation that addressed pain points, drove efficiency, and enhanced therapist satisfaction.

Attendees will gain an inside look at Team Rehab's comprehensive journey—from selection to planning a seamless rollout, engaging clinicians, and overcoming resistance to change. The session will highlight strategies to ensure therapist buy-in, real-world outcomes such as improved efficiency and compliance, and key lessons learned while scaling the solution across a large organization.

Whether you're leading a small team or managing a larger group, this session equips you with actionable strategies to implement and scale technology effectively. Whether you're exploring AI for the first time or optimizing an existing solution, you'll leave with the insights and tools to drive meaningful change.

State the problem in your case study: Growing documentation burden makes it hard to retain therapists, we needed a strategy to help drive efficient documentation that would also help maintain the compliance and appropriate coding strategies through the organization. Additionally, we knew that once selecting a solution, the rollout would require us to be

thorough, patient, and deliberate in order to drive success and adoption across 500+ therapists.

Explain your solution: We selected AI scribing as the solution to the administrative burden on our therapists but the rollout of the solution is really the focus of the case study. We were very thoughtful, using a staged approach to implementation and ensuring that onboarding, training, and QA happened with each new wave of users. This approach was successful in achieving steady, progressive and widespread adoption of the tool and subsequently have been able to reach our highest compliance scores to date.

Upon completion of this course, you will be able to:

- Evaluate critical criteria for selecting an AI scribing solution, including technical and EMR compatibility, compliance, and user experience.
- Distinguish the various stakeholders and the roles each play in the successful rollout of AI scribing
- Develop a strategic rollout and adoption plan to ensure high engagement and sustained use among therapists.
- Analyze the measurable outcomes of the implementation, including efficiency, therapist satisfaction, and organizational improvements.

Content Reference:

1. Schwartz-Dillard, Jessica et al. "Electronic documentation burden among outpatient rehabilitation therapists: a qualitative descriptive study and quality improvement initiative." Journal of the American Medical Informatics Association : JAMIA vol. 31,10 (2024): 2347-2355. doi:10.1093/jamia/ocae192
2. Gardner RL, Cooper E, Haskell J, Harris DA, Poplau S, Kroth PJ, Linzer M. Physician stress and burnout: the impact of health information technology. Journal of the American Medical Informatics Association. 2019 Feb;26(2):106-14.
3. University of Florida Implementation Science Resource Hub. 2024, Oct 7. The Technology Adoption Curve: Embracing Innovation in Healthcare. Accessed January 15, 2025, <https://impsci.med.ufl.edu/the-technology-adoption-curve-embracing-innovation-in-healthcare/>
4. Evidence in Motion. 2023, Feb 27 . Freeing Rehab Therapists from Administrative Harm. Accessed January 15, 2025, <https://evidenceinmotion.com/freeing-rehab-therapists-from-administrative-harm/>
5. Journal of the American Medical Informatics Association. Ambient artificial intelligence scribes: physician burnout and perspectives on usability and documentation burden. Accessed January 15, 2025, <https://academic.oup.com/jamia/advance-article-abstract/doi/10.1093/jamia/ocae295/7917501?redirectedFrom=fulltext>

10:30 AM –
11:30 AM

#302

Fierce Feedback: Enhancing Clinic Culture and Employee Retention Through Communication

Primary Speaker: Katherine Shephard, PT, DPT (New Normal Physical Therapy)

Co-Speaker: Nicola Robertson, PT (Diamond Physiotherapy)

.1 CEUs/ 1.0 Contact Hours

Course Level: Intermediate

A thriving clinic culture starts with effective communication. In this session, we'll explore how feedback—both constructive and positive—can transform team dynamics, improve employee satisfaction, and strengthen retention in physical therapy clinics. Attendees will learn actionable strategies to provide clear, actionable feedback while maintaining trust and professionalism, ensuring alignment with organizational goals, and fostering a sense of belonging among team members.

		<p>We'll discuss how to tackle tough conversations with empathy and confidence, ensuring that issues are addressed before they escalate. Participants will learn how feedback can empower employees to grow, feel valued, and stay engaged in their roles.</p> <p>This session also emphasizes creating a feedback-driven culture where team members feel supported, heard, and motivated to excel. With time for Q&A, attendees can explore real-world scenarios and walk away with a roadmap to enhance communication practices, increase job satisfaction, and build a cohesive, high-performing clinic team.</p> <p>Upon completion of this course, you will be able to:</p> <ul style="list-style-type: none"> • Understand the Importance of Feedback: Recognize feedback as a tool for growth, collaboration, and operational success. • Master Effective Feedback Delivery: Learn a structured approach to providing clear, constructive, and actionable feedback while maintaining trust and professionalism. • Navigate Challenging Conversations: Develop confidence in addressing difficult issues and confronting behavior that hinders team success. • Create a Feedback-Driven Culture: Establish norms that encourage openness, accountability, and continuous improvement within the team. <p>Content Reference:</p> <ol style="list-style-type: none"> 1. Gaunt, Anne PhD; Markham, Deborah H. MMedEd; Pawlikowska, Teresa R.B. PhD. Exploring the Role of Self-Motives in Postgraduate Trainees' Feedback-Seeking Behavior in the Clinical Workplace: A Multicenter Study of Workplace-Based Assessments From the United Kingdom. <i>Academic Medicine</i> 93(10):p 1576-1583, October 2018. DOI: 10.1097/ACM.0000000000002348 2. Noble, C., Sly, C., Collier, L., Armit, L., Hilder, J., Molloy, E. (2019). Enhancing Feedback Literacy in the Workplace: A Learner-Centred Approach. In: Billett, S., Newton, J., Rogers, G., Noble, C. (eds) <i>Augmenting Health and Social Care Students' Clinical Learning Experiences</i>. Professional and Practice-based Learning, vol 25. Springer, Cham. https://doi.org/10.1007/978-3-030-05560-8_13 3. Jankelová, N., Joniaková, Z., & Skorková, Z. (2021). Perceived Organizational Support and Work Engagement of First-Line Managers in Healthcare – The Mediation Role of Feedback Seeking Behavior. <i>Journal of Multidisciplinary Healthcare</i>, 14, 3109–3123. https://doi.org/10.2147/JMDH.S326563 4. Crans, S., Aksentieva, P., Beusaert, S., & Segers, M. (2022). Learning leadership and feedback seeking behavior: Leadership that spurs feedback seeking. <i>Frontiers in Psychology</i>, 13, 890861. https://doi.org/10.3389/fpsyg.2022.890861 5. Noble, C., Billett, S., Armit, L. et al. "It's yours to take": generating learner feedback literacy in the workplace. <i>Adv in Health Sci Educ</i> 25, 55–74 (2020). https://doi.org/10.1007/s10459-019-09905-5 6. Suhoyo, Y., Schönrock-Adema, J., Emilia, O. et al. Clinical workplace learning: perceived learning value of individual and group feedback in a collectivistic culture. <i>BMC Med Educ</i> 18, 79 (2018). https://doi.org/10.1186/s12909-018-1188-0 7. Fuentes-Cimma, J., Sluijsmans, D., Ortega-Bastidas, J., Villagran, I., Riquelme-Perez, A., & Heeneman, S. (2024). Students and Clinical Teachers' Experiences About Productive Feedback Practices in the Clinical Workplace from a Sociocultural Perspective. <i>International Medical Education</i>, 3(4), 461-472. https://doi.org/10.3390/ime3040035
10:30 AM – 11:30 AM	#303	<p>Getting Google's Attention: Can't-Miss Online Visibility Strategies for Your Local Clinic Primary Speaker: Peter Cartier (PT Marketing Pros)</p> <p>.1 CEUs/ 1.0 Contact Hours</p> <p>Course Level: Intermediate</p>

Good help shouldn't be hard to find! As digital marketing and search engine strategies continue to evolve to keep pace with Google's algorithms for getting found online, are you doing what it takes to help your local clinic(s) stand out from the local competition? This session breaks down the SEO foundation you must set with your most important digital assets, your website, and your Google Business Profile so you can get Google's attention. From there, we'll discuss specific, actionable tactics you can use and free reporting tools you can leverage across your online brand presence to start shining in Google's local search results, attracting more new patients, and growing your business!

Upon completion of this course, you will be able to:

- Set a solid digital foundation for your practice with a complete checklist for an optimized website and Google Business Profile.
- Choose and implement the right search engine optimization tactics and strategies for improved online visibility and business growth goals.
- Setup and track key performance indicators (KPIs) and measure return on investment (ROI) regularly with free tools and reports.

Content Reference:

1. Enriquez, R., Han, D., Harris, R., & Reddick, C. (2024). Digital divide and digital engagement in small business owners: an examination of survey data. *Information, Communication & Society*, 1–19. <https://doi.org/10.1080/1369118X.2024.2423348>. Accessed January 1, 2025.
2. Shpresa Mehmeti-Bajrami, Fidan Qerimi, Arbëresha Qerimi. The Impact of Digital Marketing vs. Traditional Marketing on Consumer Buying Behavior. *HighTech and Innovation Journal*. 2022;3(3):326-340. doi:10.28991/HIJ-2022-03-03-08. https://www.researchgate.net/publication/364269222_The_Impact_of_Digital_Marketing_vs_Traditional_Marketing_on_Consumer_Buying_Behavior. Accessed January 1, 2025.
3. Prasad A. Physical therapy marketing: How to attract and retain your ideal patients. GMR Web Team. <https://www.gmrwebteam.com/blog/physical-therapy-marketing>. Published January 4, 2022. Accessed January 1, 2025.
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10:30 AM – 11:30 AM

#304

Leadership Transformed: Navigating from Command and Control to Mission Control

Primary Speaker: Kendell Jno-Finn, PT, DPT (M3 Performance and Physical Therapy)

.1 CEUs/ 1.0 Contact Hours

Course Level: Intermediate

The conventional "command and control" leadership model, characterized by its hierarchical, directive approach, is undergoing a significant reevaluation in today's dynamic business environment. This presentation, inspired by Jim Collin's Good to Great," delves into the transformative journey from a Level 1 Leader, rooted in authority, to a Level 5 Leader who empowers others to lead. It will explore the philosophical shift towards "mission control," a leadership style that emphasizes empowerment, autonomy, and alignment of individual roles with organizational goals.

		<p>This session will outline how this shift not only enhances innovation and engagement within teams but is essential for organizations aiming to thrive in a knowledge economy marked by rapid changes and new workforce dynamics. Practical strategies for implementing mission-centric leadership will be discussed, focusing on balancing capacity to lead with the identification and resolution of performance bottlenecks to optimize output. This approach promotes a culture where diverse perspectives are valued and accountability is positively embraced, facilitating a smooth transition to a leadership style that is better suited to contemporary challenges such as the Great Resignation. By embracing mission control, leaders can unlock the full potential of their teams and foster a robust, adaptive organizational culture.</p> <p>Upon completion of this course, you will be able to:</p> <ul style="list-style-type: none"> • Understand the challenges and inefficiencies of the command and control model, in environments that require flexibility, innovation, and employee engagement. • Explore the Principles of Mission Control Leadership: Attendees will learn about the key elements of mission control leadership, including empowerment, team autonomy, and the alignment of personal and organizational goals. • Become familiar with strategies for transitioning from a command and control to mission control frameworks, emphasizing capacity building, bottleneck identification, and managing team dynamics. • Explore how mission control leadership can enhance organizational culture, improve employee satisfaction, and lead to better overall business outcomes in a knowledge-driven economy. <p>Content Reference:</p> <ol style="list-style-type: none"> 1. Buberl, Thomas, et al. "Leading a Company That Can Thrive in a Chaotic World." Harvard Business Review, 1 Apr. 2024, hbr.org/2024/04/leading-a-company-that-can-thrive-in-a-chaotic-world. Accessed 13 June 2025. 2. Duchene, Kate, and Antonio Nieto-Rodriguez. "Creating a Cohesive Team for Corporate Transformation Projects." Harvard Business Review, 29 Sept. 2023, hbr.org/2023/09/creating-a-cohesive-team-for-corporate-transformation-projects. Accessed 13 June 2025. 3. Ginni Rometty. Good Power. Harvard Business Press, 7 Mar 2023. 4. 2023.Knight, Rebecca. "6 Common Leadership Styles and How to Decide Which to Use When." Harvard Business Review, 9 Apr. 2024, hbr.org/2024/04/6-common-leadership-styles-and-how-to-decide-which-to-use-when. Accessed 13 June 2025. 5. Kotter, John, et al. "Is Your Organization Surviving Change — or Thriving in It?" Harvard Business Review, 13 Aug. 2021, hbr.org/2021/08/is-your-organization-surviving-change-or-thriving-in-it. Accessed 13 June 2025.
10:30 AM – 11:30 AM	#305	<p>The Legal Cases of Physical Therapists Vs. Payors: How and Why We Win Primary Speaker: Laurence Benz, PT, DPT, MBA (Confluent Health) Co-Speaker: Paul Gaspar, DPT (Independent Physical Therapists of California)</p> <p>.1 CEUs/ 1.0 Contact Hours</p> <p>Course Level: Intermediate</p> <p>The Legal Cases of Physical Therapists Vs. Payors: How and Why We Win will trace the remarkable history of physical therapist litigation cases against major payors. It is not widely known that physical therapists have participated and been part of litigation strategies against major payors to right the many wrongs physical therapists have had to deal with, including payor collusion, unilateral changes in fee schedules, and payors directing patients to the lowest reimbursement provider. The cases include major wins against Humana and the recent Blues litigation that resulted in a \$2.8 billion settlement, the largest in history. The presentation will include the strategies that enable PT to win,</p>

		<p>why these strategies resonate with lawyers and judges, and why an ongoing litigation strategy is crucial for private practices and the profession.</p> <p>Upon completion of this course, you will be able to:</p> <ol style="list-style-type: none"> 1. Informed in the number of cases where physical therapists have won cases against major payors 2. Understand how to file a case in the Blue Cross settlement and understand the non financial changes that will help their practice 3. Identify key payor patterns that might best be served by a litigation strategy 4. Understand the rationale for a litigation strategy for their practice and the profession 5. Communicate with their peers the significant victories we have had in defeating major payors. <p>Content Reference:</p> <ol style="list-style-type: none"> 1. “Court Issues Preliminary Approval of \$2.8 Billion Blue Cross Blue Shield Provider Settlement AHA News.” <i>American Hospital Association AHA News</i>, 2024, www.aha.org/news/headline/2024-12-05-court-issues-preliminary-approval-28-billion-blue-cross-blue-shield-provider-settlement. Accessed July 31, 2025. 2. Pozgar, George D. <i>Legal and Ethical Issues for Health Professionals</i>. 6th ed., Jones & Bartlett Learning, 21 Mar. 2024. 3. Joyce. “California Medical Association v. Aetna Health of California Inc. (July 17, 2023) _ Cal.5th _ [2023 WL 4553703] - California Lawyers Association.” <i>California Lawyers Association</i>, 28 July 2023, calawyers.org/business-law/california-medical-association-v-aetna-health-of-california-inc/. 4. Iowa Ass’n of Oriental Medicine and Acupuncture et al. v. Iowa Bd. of Physical and Occupational Therapy et al. No. 16 1902, Court of Appeals of Iowa, decided Jan. 10, 2018. PDF file. Iowa Judiciary. https://www.iowacourts.gov/static/media/cms/161902_ORIENTAL_MED_v_B8C735D0AD31F.pdf. Accessed August 1, 2025. 5. SGT in the News: Judge Revives Aetna Physical Therapy Coverage Fight.” <i>Sgtlaw.com</i>, 2022, www.sgtlaw.com/media/news/2022-03-17-conn-judge-revives-aetna-physical-therapy-coverage-fight. Accessed 1 Aug. 2025.
<p>10:30 AM – 11:30 AM</p>	<p>#306</p>	<p>What Every Owner Should Know About Exit Strategies and Practice Value Primary Speaker: Steve Stalzer, MBA, PT (8150 Advisors)</p> <p>.1 CEUs/ 1.0 Contact Hours</p> <p>Course Level: Intermediate</p> <p>Whether an owner is preparing for retirement or building value for the long haul, this presentation will help owners in building practice value and expanding exit strategies for the future. Owners will learn to leverage operational strengths and mitigate critical weaknesses to improve organizational health and enhance practice value and open doors for future partnership or exit strategies. We will also provide an overview of initiatives to optimize practice value in a sale regardless of succession plans or timeline. Understanding the drivers of practice value and key steps in marketing and selling a practice will help owners be successful when the time for an exit is right. Participants will gain insight into the sales process, importance of terms outlined in a letter of intent, and learn how to prepare for the diligence process. Finally, participants will be able to explain the value of a strong and experienced team assisting in the execution of their transaction.</p> <p>Upon completion of this course, you will be able to:</p>

- Articulate the drivers of practice value, current trends, and benefits of building a growth company
- Outline critical deal terms and the importance of a thorough letter of intent (LOI)
- Describe the due diligence process and how to best prepare for diligence
- Understand the importance of an experienced team in your corner including legal counsel, tax advisor/CPA, and M&A Advisor.

Content Reference:

1. Dafny, Leemore. "Addressing Consolidation in Health Care Markets." JAMA vol. 325,10 (2021): 927-928. doi:10.1001/jama.2021.0038
2. Mikhail, Christopher et al. "Trends in Private Equity Acquisition of Orthopaedic Surgery Practices in the United States." Journal of the American Academy of Orthopaedic Surgeons. Global research & reviews vol. 5,12 e21.00162-8. 20 Dec. 2021, doi:10.5435/JAAOSGlobal-D-21-00162
3. Bugbee, Mary, et al. RECENT TRENDS in PRIVATE EQUITY HEALTHCARE ACQUISITIONS. 2023.
4. Buntin, Melinda B. "The Blitzkrieg Acquisition of Medical Practices by Private Equity." JAMA health forum vol. 1,3 e200327. 2 Mar. 2020, doi:10.1001/jamahealthforum.2020.0327
5. Webster, James. "Private equity's plot against older Americans." Journal of the American Geriatrics Society vol. 72,7 (2024): 2269-2270. doi:10.1111/jgs.18827

3:15 PM –
4:15 PM

#307

Due Diligence: A Compliance Program Stress Test

Primary Speaker: Angela Pennisi, PT, DPT, MS (PhysioPartners)

.1 CEUs/ 1.0 Contact Hours

Course Level: Advanced

Few situations will scrutinize your company's compliance program more than the due diligence process associated with bringing in partners, merging, or selling your practice. Beyond auditing a few patient charts, due diligence places your entire compliance program under a microscope, possibly impacting the value of your practice, as well as closing the sale on schedule.

This session will review common compliance-related requests during due diligence, as well as an overview of how they will be evaluated and reported to the acquiring entity. The elements of a compliance plan, how to conduct a risk assessment and a real-life case study will be included to reinforce learning for participants.

Upon completion of this course, you will be able to:

- Describe the seven elements of a compliance program to proactively prepare for the due diligence process.
- Describe the importance of their compliance program on practice valuation or sale closing timeline.
- List the elements of a compliance risk assessment process to support appropriate allocation of compliance and practice resources.

Content Reference:

1. Barb P, ed. Complete Healthcare Compliance Manual. Eden Prairie, MN; 2024. <https://compliancecosmos.org/copyright-16> . Accessed January 11, 2025.
2. U.S. Department of Health and Human Services, Office of Inspector General. General Compliance Program Guidance. November 2023. PDF, <https://oig.hhs.gov/documents/compliance-guidance/1135/HHS-OIG-GCPG-2023.pdf>.
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3:15 PM – 4:15 PM	#308	<p>Making Your Performance Reviews Meaningful! Primary Speaker: Brandon Seigel (Wellness Works Management Partners)</p> <p>.1 CEUs/ 1.0 Contact Hours</p> <p>Course Level: Intermediate</p> <p>Making Your Performance Reviews Meaningful" transforms how we empower employees and creates a new approach to self-awareness, self-fulfillment, and professional meaningfulness. Tony Hsieh documents in his book, "Delivering Happiness," that to deliver happiness, there is a science, and it consists of alignment in purpose, feeling connected, and experiencing progress. As we look at today's challenging employment environment, it is extremely hard for employees to experience progress from their perspective when reimbursements are stagnant and compensation ladders are limited. This session will go into the role of implementing innovative performance reviews to provide context for employees to find new meaning and progress in their roles outside of just a compensation review. This session will discuss strategies for creating career ladders not tied to compensation, the role of continuing education in connection to performance reviews, and how performance reviews are an opportunity for not just employee accountability but also a strategy to engage an employee's purpose connected to professional growth and improvement. According to studies, 92% of employees want feedback more often than just once a year. After this session, private practice leaders will be able to implement a new form of performance review that increases an employee's self-awareness, develops a growth roadmap, and illustrates progress so that employees are tapping into a meaningful workplace environment.</p> <p>Upon completion of this course, you will be able to:</p> <ul style="list-style-type: none"> • Identify all of the factors that can negatively impact a performance review from being effective • Apply strategies for deconstructing the performance process and elevating the meaningfulness of how the review process can increase growth. • Understand how to craft performance reviews that are standardized while meaningful with clear actionable goals that benefit the employee • Navigate raise requests by creating a financial ladder and trajectory that spans a tenure growth trajectory • Implement a new hiring approach that streamlines the role of performance reviews on a continuous basis <p>Content Reference:</p> <ol style="list-style-type: none"> 1. Delpo, A. Guerin, L. (2021). Dealing With Problem Employees: How to Manage Performance & Personal Issues in the Workplace. NOLO;11th edition 2. Montanez, L. (2022). Employee Performance Appraisal Forms Book. Worker Review and Evaluation Book. Independent Published 3. Murphy, C. (2023). What makes Great Managers Great: How to raise engagement, give feedback, and answer the questions no one's asking. Houndstooth Press. 4. Seigel, B. (2019). Private practice survival guide: A journey to unlock your freedom to Success. Rebel Press. 5. Sobelton, Cassie. (2019). The Employee Wellbeing Handbook. Archangel Ink.

<p>3:15 PM – 4:15 PM</p>	<p>#309</p>	<p>Navigating Change: Effective Strategies for Rehab Therapy Leadership Transitions Primary Speaker: Heidi Jannenga, PT, DPT (WebPT)</p> <p>.1 CEUs/ 1.0 Contact Hours</p> <p>Course Level: Intermediate</p> <p>The rehab therapy industry has seen a surge in mergers, acquisitions, and ownership changes in recent years. When any of these scenarios occur, practices have to find their way through leadership transitions, which can make or break the future of the business. This session will prepare clinic owners to successfully navigate leadership shifts, whether they’re promoting from within, hiring an external CEO, or stepping into a leadership role themselves.</p> <p>Attendees will learn how to recognize when a leadership change is needed and how to select the right leader for their practice. The session will explore the benefits and challenges of promoting from within, such as maintaining company culture, and the considerations when bringing in an external leader. Key topics will include career pathing, leadership decision-making frameworks, and aligning new leadership with company values.</p> <p>This session will cover important industry insights and highlight the importance of dedicating time to both leadership and business operations. Drawing on real-world examples and data, the session will address how to build a transition plan that maintains continuity, fosters growth, and supports long-term success. The discussion will also explore the role of private equity in leadership transitions and how consolidation trends in the physical therapy market can impact clinic owners' decisions. Attendees will leave with a roadmap for creating a leadership transition plan that ensures business continuity, fosters growth, and aligns with core values, all while preparing for industry-wide consolidation trends.</p> <p>Upon completion of this course, you will be able to:</p> <ul style="list-style-type: none"> • Understand when to initiate a leadership transition. • Develop a strategy for selecting and onboarding new leadership. • Formulate a successful transition plan that supports culture and growth. <p>Content Reference:</p> <ol style="list-style-type: none"> 1. “APTA Report Points to Hiring Challenges for Outpatient Practices amid Growth.” Apta.org, 16 Oct. 2024, www.apta.org/article/2024/10/16/report-on-hiring-challenges-2024. Accessed 19 Dec. 2024. 2. Watkins, Michael D. FIRST 90 DAYS, NEWLY REVISED and UPDATED : Proven Strategies for Getting up to Speed Faster And... Smarter. S.L., Harvard Bus Review Press, 2023. 3. WebPT, Inc. “The State of Rehab Therapy in 2024.” Webpt.com, 29 Jan. 2025, www.webpt.com/downloads/the-state-of-rehab-therapy-in-2024. Accessed 19 Dec. 2024. 4. Grand View Research. U.S. Physical Therapy Services Market Size, Share & Trends Analysis Report By Application (Orthopedic Therapy, Neurological Therapy), By Settings (Outpatient Clinics, Hospitals), By Payer (Public Insurance, Private Insurance), And Segment Forecasts, 2025 - 2030. Accessed December 19, 2024, https://www.grandviewresearch.com/industry-analysis/us-physical-therapy-services-market-report 5. Green-Wilson, Jennifer, et al. “Exploring the Concept of Leadership from the Perspective of Physical Therapists in the United States.” Physiotherapy Canada, Winter 2022. https://pmc.ncbi.nlm.nih.gov/articles/PMC8816367/ Accessed 31 July 2025.
<p>3:00 PM – 4:00 PM</p>	<p>#310</p>	<p>No Clinic is an Island: How a Single Location Island Practice Scaled with Digital PT Primary Speaker: Ellen Morello, PT, DPT (EverEx) Co-Speaker: Susan A. Sanford, PT, DPT (Vineyard Complementary Medicine)</p>

		<p>.1 CEUs/ 1.0 Contact Hours</p> <p>Course Level: Intermediate</p> <p>In this session, practice owners will learn how a single-location clinic located on a small island was able to scale its operations far beyond its geographic footprint using telehealth, RTM, patient education courses, and innovative staffing models. This island population goes up over 5x during the summer months and has a housing crisis, which has created a unique staffing challenge for the practice. Participants will learn how this practice owner solved for these challenges by combining housing incentives, rotational staffing programs, virtual intakes and telehealth, educational courses, group programs, and RTM to create robust offerings for patients who are not physically on the island year-round. By the end of the course, participants will have learned a plan to implement innovative digital solutions and staffing models into their own practices in order to scale beyond their geographic footprint. Participants will learn the metrics to track to ensure program success and optimize clinical outcomes while serving larger populations.</p> <p>Upon completion of this course, you will be able to:</p> <ul style="list-style-type: none"> • Design an operational plan to scale beyond your geographic footprint using digital health softwares and services, including telehealth and RTM • Analyze the ROI and clinical outcomes of implementing digital PT in a small practice • Develop innovative staffing strategies that can adapt to fluctuating patient caseloads • Choose from multiple innovative strategies that could facilitate practice growth and patient engagement beyond the clinic <p>Content Reference:</p> <ol style="list-style-type: none"> 1. Beresford L, Norwood T. The Effect of Mobile Care Delivery on Clinically Meaningful Outcomes, Satisfaction, and Engagement Among Physical Therapy Patients: Observational Retrospective Study. JMIR Rehabil Assist Technol. 2022 Feb 2;9(1):e31349. doi: 10.2196/31349. PMID: 35107436; PMCID: PMC8851343. 2. Alan C Lee, Jufdith E Deutsch, Lesley Holdsworth, Sandra L Kaplan, Heidi Kosakowski, Robert Latz, Lydia Lennox McNear, Jennifer O’Neil, Oscar Ronzio, Kelly Sanders, Michelle Sigmund-Gaines, Michele Wiley, Trevor Russell, Telerehabilitation in Physical Therapist Practice: A Clinical Practice Guideline From the American Physical Therapy Association, Physical Therapy, Volume 104, Issue 5, May 2024, pzae045, https://doi.org/10.1093/ptj/pzae045 3. Chen F, Siego CV, Jasik CB, Norwood T, Beresford L, Yang Z, Dall TM. The value of virtual physical therapy for musculoskeletal care. Am J Manag Care. 2023 Jun 1;29(6):e169-e175. doi: 10.37765/ajmc.2023.89375. PMID: 37341981. 4. Seonwoo E. Housing, nursing shortage impacts on-Island healthcare staffing. MV Times. 2023 May 31. https://www.mvtimes.com/2023/05/31/housing-nursing-shortage-impacts-island-healthcare-staffing/ 5. Marshall, T., Goldman, A., Lyles, R., Grundstein, M. J., Ahmadian, N., Koc, T. A., Jr., & Gruner, M. (2025). Retrospective case-control study of the effect of in-person physical therapy with remote therapeutic monitoring on functional status and adherence among patients with musculoskeletal conditions. Archives of Rehabilitation Research and Clinical Translation. Advance online publication. https://doi.org/10.1016/j.arrct.2025.100466
3:15 PM – 4:15 PM	#311	<p>Thriving in Private Practice 2.0: Cash, Out-of-Network, and Insurance Models Uncovered</p> <p>Primary Speaker: Sara Mikulsky, PT, DPT (Sara Mikulsky Wellness Physical Therapy, PLLC)</p> <p>Co-Speaker: Theresa Marko, PT, DPT (Marko Physical Therapy, PLLC), Karen Litzy, PT, DPT (Karen Litzy Physical Therapy, PLLC), Seth Greiner, MSPT, TPI (Greiner Physical Therapy)</p> <p>.1 CEUs/ 1.0 Contact Hours</p> <p>Course Level: Intermediate</p>

Dive into an insightful, no-holds-barred discussion with three dynamic practice owners as they reveal the inner workings, challenges, and rewards of different practice models: cash-based, out-of-network, and insurance-participating. Led by an expert moderator, this session goes beyond theory to offer real-world strategies for maximizing revenue, adapting to changing insurance landscapes, and refining your own practice model. Engage in live polls, explore emerging trends, and get answers to your most pressing questions. Join us as we unpack the highs, lows, and invaluable lessons of practice ownership—it's an unmissable opportunity for fresh perspectives and actionable takeaways!

Upon completion of this course, you will be able to:

- Explore the pros and cons of cash-based, out-of-network, and insurance-participating practice models.
- Identify common challenges and unique obstacles associated with each practice model.
- Discover actionable insights and key lessons from experienced practice owners to enhance your private practice journey.

Content Reference:

1. Heidi Jannenga, "Physical Therapists' Guide to Starting an Outpatient Clinic," WebPT, February 12, 2019. Access date: November 8, 2024: <https://www.webpt.com/how-to-start-a-physical-therapy-clinic>
2. APTA Private Practice. "Opening a Private Practice" Updated December 2023. Access date November 8, 2024: <https://ppsapta.org/practice-management/opening-private-practice.cfm>
3. Bell, Alice. "Cash-Based Practice: It's Complicated" APTA, August, 1, 2021. Access date November 8, 2024: <https://www.apta.org/apta-magazine/2021/08/01/apta-magazine-august-2021/cash-based-practice-its-complicated>
4. Taylor, Sally M., McMenamin, Peter J., Hilliard, Marjorie Johnson. "Collaborating to Integrate Education and Practice: A Model of a Physical Therapy Academic Clinical Partnership" Journal of Physical Therapy Education, 2022, Vol 36, Is 2. Pg 139-145: <https://www.scholars.northwestern.edu/en/publications/collaborating-to-integrate-education-and-practice-a-model-of-a-ph>
5. APTA. "The Economic Value of Physical Therapy in the United States- A Report from the American Physical Therapy Association" September 2023. Access date November 8, 2024: https://www.valueofpt.com/globalassets/value-of-pt/economic_value_pt_u.s._report_from_apta-report.pdf

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#313

Clinic Design: Creating Functional, Memorable and Inspiring Spaces to Grow Your Brand
Primary Speaker: Meg MacPherson, MScPT (Articulate Design + Consulting)

.1 CEUs/ 1.0 Contact Hours

Course Level: Intermediate

This session is geared toward clinic owners or those interested in clinic ownership to understand the impact that intentional design has on the function, flow, and brand experience within your clinical space. This course will touch on topics such as multifunctional space design to maximize revenue, how to create a memorable brand experience, and the integration of technology to create an innovative clinic.

Participants can expect to leave with an enhanced awareness of the principles of clinic design, tangible steps to create a clinic concept and unique brand experience, insight into where it is smart to invest within your space and where to save money, a deeper understanding of using technology within your space to enhance the functionality, and simple ways to maximize income generation through thoughtful design.

		<p>We live in an experience economy where almost every industry has capitalized on not just providing a service but rather an experience. Health care has a massive opportunity to use design in a thoughtful way to enhance the user experience and to create a new standard for our profession.</p> <p>Upon completion of this course, you will be able to:</p> <ul style="list-style-type: none"> • Implement a unique and elevated brand experience within your space • Recognize areas of inefficiency within your space and ways to make the clinic function and flow more effectively. • Understand new ways of using technology to make your clinic more innovative • Understand some of the key principles of clinic design and have tools and tricks to implement these concepts. <p>Content Reference:</p> <ol style="list-style-type: none"> 1. Kent, Lindsey, et al. "Why the Spaces in Which We Deliver Care Matter: Implications and Recommendations for General Practice." <i>British Journal of General Practice</i>, vol. 74, no. 744, 27 June 2024, pp. 326–328, https://doi.org/10.3399/bjgp24x738741. Accessed Jun 28, 2024. 2. Bosch, Sheila J., and Lesa N. Lorusso. "Promoting Patient and Family Engagement through Healthcare Facility Design: A Systematic Literature Review." <i>Journal of Environmental Psychology</i>, vol. 62, no. 0272-4944, Apr. 2019, pp. 74–83, https://doi.org/10.1016/j.jenvp.2019.02.002. Accessed 29 Apr. 2019 3. "4 Ways Design Can Improve Mental Health Care Spaces." <i>Psychology Today</i>, 2020, www.psychologytoday.com/ca/blog/designing-better-mental-health/202002/4-ways-design-can-improve-mental-health-care-spaces. Accessed 13 June 2025. 4. Inas Al Khatib, et al. "A Systematic Review of the Impact of Therapeutical Biophilic Design on Health and Wellbeing of Patients and Care Providers in Healthcare Services Settings." <i>Frontiers in Built Environment</i>, vol. 10, 4 Sept. 2024, https://doi.org/10.3389/fbuil.2024.1467692. Accessed Jun 28, 2024 5. Bernhardt, Julie et al. "Why hospital design matters: A narrative review of built environments research relevant to stroke care." <i>International journal of stroke : official journal of the International Stroke Society</i> vol. 17,4 (2022): 370-377. doi:10.1177/17474930211042485. Accessed Aug 24, 2024. 6. Noble, B., & Craig, C. (2023). Designing spaces for care in the time of Covid. <i>Design for Health</i>, 7(2), 133–137. https://doi.org/10.1080/24735132.2023.2226449
4:30 PM – 5:30 PM	#314	<p>From Scrambling to Strategic: Building a Therapist Recruitment Pipeline Primary Speaker: Rachel Grubb, PT, DPT (Therapy Partner Solutions)</p> <p>.1 CEUs/ 1.0 Contact Hours</p> <p>Course Level: Intermediate</p> <p>In the current landscape of therapist shortages, private practice owners face growing challenges to attract and hire top talent. This session is designed to equip you with actionable strategies to operationalize a proactive and intentional hiring funnel, ensuring your clinic not only survives but thrives. While much attention is given to optimizing the patient experience—through exceptional customer service, outcome measures, and satisfaction scores—this session emphasizes the importance of applying the same level of intentionality to the candidate experience. You’ll learn how to implement a consistent, strategic approach to talent acquisition and discover how to effectively leverage internal resources to build a robust and dynamic hiring pipeline.</p> <p>Key takeaways:</p> <ol style="list-style-type: none"> 1. Crafting a forward-thinking hiring strategy to eliminate last-minute staffing crises. 2. How to optimize the interview process to enhance the candidate experience, including emphasizing swift follow-ups, transparent communication, and highlighting your clinic's unique strengths.

3. Explore effective sourcing strategies, including tracking student program data, conducting outreach campaigns, and leveraging staffing agencies.
4. Gain tools for building a comprehensive hiring funnel, such as internal referral programs, connections with university and alumni networks, and maximizing job board visibility.
5. Understand how to connect with candidates by recognizing their specific needs and goals, avoiding assumptions, and fostering genuine, meaningful communication.

Upon completion of this course, you will be able to:

- Design a proactive hiring strategy to prevent last-minute staffing shortages and maintain steady recruitment efforts.
- Create an interview process that enhances the candidate experience through prompt follow-ups, clear communication, and showcasing their clinic’s unique strengths.
- Implement sourcing tactics like leveraging referral programs, utilizing student program data, and optimizing job board visibility to attract top therapist talent.
- Connect with candidates effectively by understanding their specific needs, avoiding assumptions, and fostering genuine communication.

Content Reference:

1. American Physical Therapy Association. Report Reveals Continued Vacancy Challenges for Outpatient Clinics. Published October 18, 2023. Accessed January 16, 2025. <https://www.apta.org/news/2023/10/18/vacancy-challenges-outpatient-clinics>.
2. American Physical Therapy Association. APTA Benchmark Report: Hiring Challenges Continue in Outpatient Physical Therapy Practices. Published October 2023. Accessed January 16, 2025. <https://www.apta.org/apta-and-you/news-publications/reports/2023/benchmark-report-hiring-challenges-continue-outpatient-physical-therapy-practices> .
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5. Definitive Healthcare. Addressing the Healthcare Staffing Shortage: 2023 Report. Accessed January 16, 2025. <https://www.definitivehc.com/sites/default/files/resources/pdfs/Addressing-the-healthcare-staffing-shortage-2023.pdf>.
6. Raintree Systems. APTA Interview: Facing the Physical Therapy Workforce Shortage. Published December 8, 2023. Accessed January 16, 2025. <https://www.raintreeinc.com/2023/12/08/apta-workforce-shortage-interview>.
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#315

How Key Performance Indicators Link With Insurance Contract Negotiations To Drive Profits

Primary Speaker: Rick Gawenda, PT (Gawenda Seminars & Consulting)

Co-Speaker: Kennedy Hawkins, MBA,JD, LLM (Kennedy Hawkins Consulting)

.1 CEUs/ 1.0 Contact Hours

Course Level: Beginner

		<p>From 2011-2023, physical therapy reimbursement declined 37.0%. In 2024, Medicare reimbursement decreased another 1.8%. Physical therapy has become a low-margin industry. Organizations that achieve and maintain solid profit margins will understand the Key Performance Indicators that drive their business. They will also understand how insurance contracting and rate increase negotiations impact their profit margins. Key Performance Indicators and insurance contracting are interrelated and profoundly impact your profitability. In this session, you will learn what Key Performance Indicators impact your profitability, along with industry benchmarks and ways to maximum those indicators. You will learn how to leverage those well-managed Key Performance Indicators in your insurance contract negotiations to gain fee schedule increases.</p> <p>Attendees will also learn what language in a contract is favorable to the provider and language they need to avoid in a contract that is favorable to the payer. Often, physical therapists struggle to grasp this reality. These different mindsets can make the difference between signing a contract that is provider-friendly versus signing a contract that is payer-friendly. In this session, attendees will also learn how to present fee schedule increase requests in a way that resonates with insurance companies. Finally, attendees will learn the practice tips that the presenters used to negotiate fee schedule increases in their combined 60+ year careers.</p> <p>Upon completion of this course, you will be able to:</p> <ul style="list-style-type: none"> • Discover practical strategies on how to use your Key Performance Indicators to secure insurance contract fee schedule increases • Identify language to include and language to exclude in an insurance contract • Learn proven techniques to understand how insurance companies think and view physical therapy providers in contract negotiations • Understand what information is required to successfully negotiate and/or renegotiate an insurance contract <p>Content Reference:</p> <ol style="list-style-type: none"> 1. Kenny, Graham, KPIs Aren't Just About Assessing Past Performance, Harvard Business Review, September 23, 2021. https://hbr.org/2021/09/kpis-arent-just-about-assessing-past-performance 2. Bazerman, Max H. "What People Still Get Wrong about Negotiations: They Assume the Size of the Pie Is Fixed—and so Miss Opportunities to Create Value - Article - Faculty & Research - Harvard Business School." Hbs.edu, 2025, www.hbs.edu/faculty/Pages/item.aspx?num=66557. Accessed 1 July 2025. 3. Hughes, Jonathan, and Danny Ertel. "What's Your Negotiation Strategy?" Harvard Business Review, 2020, hbr.org/2020/07/whats-your-negotiation-strategy. 4. APTA, American Physical Therapy Association. The Economic Value of Physical Therapy in the United States. Sept. 2023. 5. Hudson, Caroline, Provider, Payer Contract Disputes Are Heating Up, Modern Healthcare, May 29, 2024. https://www.modernhealthcare.com/providers/health-plan-negotiations-inflation-claims-denials/. Accessed July 17, 2025 6. Healthcare Financial Management Association, Navigating Toward Successful Contract Negotiations with Health Plans, May 1, 2024. https://www.hfma.org/payment-reimbursement-and-managed-care/payment-trends/navigating-toward-successful-contract-negotiations-with-health-plans/ . Accessed July 17, 2025
4:30 PM – 5:30 PM	#316	<p>Maximize Your PT Practice Profits: Systems & Strategies for Financial Mastery Primary Speaker: Nathan Shields, PT, ECS (Private Practice Owners Club)</p> <p>.1 CEUs/ 1.0 Contact Hours</p> <p>Course Level: Beginner</p>

Struggling to improve your private practice's cash flow? This session provides actionable, proven strategies to boost your clinic's financial performance and ensure predictable profitability. We'll cut through the jargon and equip you with the tools to take control of your practice's financial health.

You'll discover how to:

- Implement key financial indicators (KPIs) and dashboards for data-driven decision-making.
- Empower your front desk team to maximize point-of-service collections.
- Optimize billing and collections processes to accelerate revenue.
- Leverage proper CPT coding and payer-specific guidelines to ethically enhance reimbursement.

Join us to learn how to identify critical financial metrics, streamline your revenue cycle, establish effective financial protocols, and enhance provider billing practices for sustainable growth. Walk away with concrete strategies you can implement immediately to improve your cash flow and secure your practice's financial future.

Upon completion of this course, you will be able to:

- Identify Key Financial Indicators: Attendees will learn to implement and analyze essential financial KPIs, from reimbursement/visit/payor to A/R reports, altogether enabling data-driven decision-making to enhance clinic performance.
- Optimize Revenue Collection Processes: Participants will be shown strategies to maximize collections at the front desk, optimize billing practices, and avoid coding-related denials, ensuring that every dollar owed is collected.
- Establish Effective Financial Protocols: Participants will be instructed in simple financial protocols and team workflows which ensure maximal cash flow and result in predictable profitability projections for their practice(s).
- Enhance Provider Billing Practices: Attendees will gain actionable insights into ethical and optimal CPT code usage, guiding them to industry resources to increase per-visit reimbursement rates across various insurance providers.

Content Reference:

1. American Physical Therapy Association. "Gauging Your Practice's Financial Health." APTA Magazine, August 1, 2018. <https://www.apta.org/apta-magazine/2018/08/01/gauging-your-practices-financial-health>. Accessed June 13,2025.
2. Medbridge. "How to Accurately Use Physical Therapy CPT Codes: Tips and Best Practices." October 25, 2024. <https://www.medbridge.com/blog/2024/10/how-to-accurately-use-physical-therapy-cpt-codes-tips-and-best-practices/>. Accessed June 13,2025.
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7. MD Clarity. "Patient Responsibility as a Percentage of Total Revenue". <https://www.mdclarity.com/rcm-metrics/patient-responsibility-as-a-percentage-of-total-revenue>
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#317

Re-balancing the Provider/Client Relationship with D2C & Sustainability Strategies
Primary Speaker: Kelly Sanders, PT, DPT, ATC (Movement for Life)

		<p>Co-Speaker: Jennifer Gamboa, PT, DPT, Fellow-National Academies of Practice (Body Dynamics)</p> <p>.1 CEUs/ 1.0 Contact Hours</p> <p>Course Level: Intermediate</p> <p>This course will cover strategies and tactics to not only survive but thrive in the private practice world of physical therapy. The presentation will focus on the overarching strategy of driving revenue vs. cost cutting. We will discuss the value of PT services and revenue strategies both in and outside of the third-party payer system. Key performance indicators will be reviewed to assist practice owners and managers in making sound financial decisions related to accepting contracts, pricing direct-to-consumer services, and compensating staff.</p> <p>Kelly Sanders and Jennifer Gamboa will also share the process, challenges, practice assessment, and disciplined innovation required to develop a roadmap for integrating direct-to-consumer programming into an existing third-party payor model. They will discuss the difference between quantitative and qualitative definitions of value, consumer perspectives on value in healthcare, and the power of the provider/client relationship. We will also discuss several key strategies implemented to grow direct-pay revenue streams for practice sustainability.</p> <p>Upon completion of this course, you will be able to:</p> <ul style="list-style-type: none"> • Differentiate between qualitative and quantitative value measures • Define consumer-centric attributes of value in healthcare • Develop a payer scorecard to assist in evaluation of burden, revenue opportunity, and value • Identify gaps in care that provide direct-to-consumer opportunities • Learn specific strategies for blending direct-pay services into an existing 3rd party payor environment. <p>Content Reference:</p> <ol style="list-style-type: none"> 1. The Commonwealth Fund. Consumer Choice in US Healthcare: Using Insights from the Past to Inform the Way Forward. November 30, 2021. https://www.commonwealthfund.org/publications/fund-reports/2021/nov/consumer-choice-us-health-care-using-insights-from-past Accessed: October 2023. 2. Ernst and Young. How to give health consumers the access and experience they value most. Consumer Health Survey 2023. Accessed October 2023. 3. Lim, W. M., Kumar, S., Pandey, N., Verma, D., & Kumar, D. (2023). Evolution and trends in consumer behaviour: Insights from Journal of Consumer Behaviour. Journal of Consumer Behaviour, 22(1), 217-232. 4. JLL Healthcare. 2023 Patient Consumer Survey: Cost and location drive patient decisions, while service and comfort drive experience. JLL Research. 2023. 5. Gordon D, Ford A, Triedman N, Hart K, Perlis R. Health Care Consumer Shopping Behaviors and Sentiment: Qualitative Study. J Particip Med. 2020 Jun 16;12(2):e13924. doi: 10.2196/13924. PMID: 33064088; PMCID: PMC7434061. 6. Powell A, Dolan P. Moving to Personalized Medicine Requires Personalized Health Plans. J Particip Med. 2022 Aug 4;14(1):e35798. doi: 10.2196/35798. PMID: 35925669; PMCID: PMC9389374. 7. Khullar, D., Darien, G., & Ness, D. L. (2020). Patient consumerism, healing relationships, and rebuilding trust in health care. JAMA, 324(23), 2359-2360. 8. DiCenzo J, Fronstin P. Lessons from the evolution of 401(k) retirement plans for increased consumerism in health care: an application of behavioral research. EBRI Issue Brief. 2008 Aug;(320):1, 3-26. PMID: 18724525.
4:30 PM – 5:30 PM	#318	<p>Transforming PT Practices with Remote Therapeutic Monitoring for Better Outcomes & Profits</p> <p>Primary Speaker: Andrew Gorecki, DPT (Superior Physical Therapy)</p>

.1 CEUs/ 1.0 Contact Hours

Course Level: Intermediate

This session provides an evidence-based exploration of how Remote Therapeutic Monitoring (RTM) enhances patient adherence, improves clinical outcomes, and drives profitability in outpatient physical therapy practices. Drawing from real-world data through a National Institute of Health Grant to perform a multi-site clinical trial, attendees will gain actionable strategies for implementing RTM to address declining reimbursements, patient compliance challenges, and workflow inefficiencies.

Upon completion of this course, you will be able to:

- List the challenges facing private physical therapy practices and explain how RTM addresses these barriers to improve patient outcomes.
- Describe the steps necessary to successfully implement RTM, including staff training, patient engagement strategies, and workflow integration.
- Demonstrate how to evaluate the financial impact of RTM using ROI metrics and real-world case studies.
- Compare RTM-enabled physical therapy workflows with traditional models to identify efficiency gains and areas for optimization.
- Formulate an actionable plan to integrate RTM into your practice, including overcoming potential barriers and leveraging data to support reimbursement

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Saturday, November 15, 2025

9:15 AM – 10:15 AM

#401

Cracking the Code: The Easiest Path to Improvement for Each Therapist “Type”

Primary Speaker: Kelly Brown, PT, DPT (PredictionHealth)

Co-Speaker: Chris Hoekstra, PT, DPT, PhD (Therapeutic Associates)

.1 CEUs/ 1.0 Contact Hours

Course Level: Intermediate

Every therapist has unique practice and documentation habits, which can make identifying effective strategies for improvement a challenge. What helps one therapist improve may not be effective with another. However, thanks to AI and millions of notes generated from rehab therapy practices nationwide, we now have visibility into therapist behaviors and documentation patterns. In this session, we’ll break down the data and share the behavior categories that emerged from our analysis and the interventions that offer the easiest path to improvement.

This session will empower practice owners and clinic leaders to take a targeted approach to driving meaningful change. By understanding each documentation type's specific challenges and strengths, interventions can be tailored to maximize efficiency, compliance, and clinical quality.

Join us to gain practical strategies for recognizing therapist documentation “types” within your organization and learn how to apply tailored interventions that drive measurable improvements. We'll also discuss the role of AI-driven tools in analyzing behaviors and streamlining documentation, sharing real-world success stories of how these insights have transformed practices.

Whether you’re a clinic owner, manager, or therapist, this session will provide actionable takeaways to help you unlock your team’s full potential, reduce administrative burden, and enhance the overall patient experience.

Upon completion of this course, you will be able to:

- Define common documentation “types” of therapists based on a national analysis of practice habits.
- Identify key challenges and strengths associated with each therapist documentation type.
- Apply tailored interventions to drive behavior change and documentation improvement.
- Evaluate AI-driven tools to support more efficient and compliant therapist documentation workflows.

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<p>9:15 AM – 10:15 AM</p>	<p>#402</p>	<p>How To Manage a Successful Front Desk Team Across Multi-Site Locations Primary Speaker: Dee Bills, PT (Front Office GURU)</p> <p>.1 CEUs/ 1.0 Contact Hours</p> <p>Course Level: Intermediate</p> <p>This session is designed to help multi-location practice owners and managers streamline their front desk operations and strengthen their leadership. Attendees will explore the most common challenges in managing front desk teams and learn essential strategies for training front office managers to lead with confidence, boost team morale, and handle daily operations effectively—all while reducing front desk turnover.</p> <p>Led by Dee Bills, who has successfully trained over 1,500 front desk staff across 400 practices in the U.S., this session will provide actionable insights into optimizing front desk performance. Attendees will uncover the #1 overlooked metric for evaluating front office success and learn how it directly impacts schedule utilization, profits, and patient satisfaction. With a practical, interactive checklist, participants will identify key areas for improvement and leave with actionable steps to fill their schedules, improve team effectiveness, and reduce front desk turnover.</p> <p><i>Upon completion of this course, you will be able to:</i></p> <ul style="list-style-type: none"> • Describe the most common challenges with managing front desk staff and turnover across multiple locations. • Describe the key role and responsibilities of a Front Office Manager. • Describe practical strategies to help front office managers lead their teams confidently and handle day-to-day challenges across multiple locations. • Describe the #1 metric for evaluating front office performance. • Apply a step-by-step checklist that pinpoints your key areas for front office improvement. <p>Content Reference:</p> <ol style="list-style-type: none"> 1. Batato, Magdi, Xavier Mesnard, and Suketu Gandhi. It's Time for a New Model for Operations Management. <i>Harvard Business Review</i>, 2023. Accessed January 14, 2025. https://hbsp.harvard.edu/product/H07SRX-PDF-ENG. 2. Edwards, V. Cues: Master the Secret Language of Charismatic Communication. 2022. 3. Orozco, Frank. How to Maximize the Strengths of a Multisite Team. <i>Forbes</i>, November 6, 2019. Accessed January 14, 2025.

		<p>https://www.forbes.com/councils/forbestechcouncil/2019/11/06/how-to-maximize-the-strengths-of-a-multisite-team/.</p> <p>4. Reynolds, M. Coach the Person, Not the Problem: A Simple Guide to Coaching for Transformation. Berrett-Koehler Publishers, 2020.</p> <p>5. Sutherland, R. Alchemy: The Dark Art and Curious Science of Creating Magic in Brands, Business, and Life. HarperCollins. 2021.</p>
9:15 AM – 10:15 AM	#403	<p>Interviewing for Truth: Uncovering Authenticity in the Hiring Process Primary Speaker: Brian Weidner, MBA (Career Tree Network)</p> <p>.1 CEUs/ 1.0 Contact Hours</p> <p>Course Level: Intermediate</p> <p>In today’s competitive job market, identifying the right candidates for your clinic goes beyond resumes and rehearsed answers. Interviewing for Truth: Uncovering Authenticity in the Hiring Process provides Physical Therapy private practice owners with proven strategies to conduct interviews that reveal a candidate’s true potential, values, and fit for your team.</p> <p>This session combines principles of behavioral interviewing with an understanding of the unique needs of Physical Therapy clinics—where cultural alignment, patient care philosophies, and teamwork are essential for success. Participants will learn how to ask targeted, insightful questions that uncover a candidate’s genuine experiences, mindset, and capabilities rather than surface-level responses. We’ll also explore techniques to detect inconsistencies, assess emotional intelligence, and identify red flags while maintaining a positive, professional candidate experience.</p> <p>By mastering these interviewing strategies, practice owners can make more informed hiring decisions, reduce turnover, and build teams that drive both clinical excellence and business growth. The course will directly enhance participants’ skills in human resources management and leadership—critical areas for running a thriving private practice.</p> <p>Attendees will leave equipped with actionable tools to strengthen their interviewing processes, ensuring they hire Physical Therapists and staff who align with their clinic’s mission, enhance patient care, and contribute to long-term organizational success.</p> <p><i>Upon completion of this course, you will be able to:</i></p> <ul style="list-style-type: none"> • Describe the benefits of using structured interviews for hiring Physical Therapists and clinic staff. • Identify the key differences between structured and unstructured interviews and their impact on hiring outcomes. • Apply techniques to minimize bias and ensure consistency during interviews. • Demonstrate how to create and use an interview scoring system to objectively evaluate candidates. • Evaluate interview outcomes to make confident, evidence-based hiring decisions for long-term team success. <p>Content Reference:</p> <ol style="list-style-type: none"> 1. Best Practices for Reducing Bias in the Interview Process. (2022). Journal of Graduate Medical Education, 14(5), 555–557. Accessed December 17, 2024. https://pmc.ncbi.nlm.nih.gov/articles/PMC9553626/ 2. Wang, Y. (2024). Exploring Interview Dynamics in Hiring Process: Structure, Response Bias, and Interviewee Experience. Advances in Economics Management and Political Sciences, 86(1), 94–102. Accessed December 17, 2024.

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9:15 AM – 10:15 AM	#404	<p>The Cash Pay Revolution: Innovative Payment Models in Physical Therapy Primary Speaker: Scott Hebert, PT, DPT (Second Door Health) Co-Speaker: Michelle Babcock, PT, MSPT (Spooner)</p> <p>.1 CEUs/ 1.0 Contact Hours</p> <p>Course Level: Intermediate</p> <p>Who really pays for physical therapy? While insurance companies often seem to hold the keys, they're merely intermediaries. The true payors are employers, patients, and communities. This session challenges attendees to rethink traditional payment systems and explore innovative models such as programmatic cash pay, bundled payments, subscription plans, and preventative services. The session will include real-world case studies of cash-pay models successfully implemented in private practices, showcasing solutions for practices of various sizes. Participants will gain strategies to create a hybrid approach that balances insurance-driven income with diversified cash pay options. This is not about abandoning insurance contracts but rather about finding the right mix to improve net rates, enhance access and affordability for patients, and support community care.</p> <p>The goal is to empower practices to diversify their revenue streams, expand offerings, and overcome the many barriers imposed by insurance companies. Attendees will leave equipped with actionable tools to monetize value-added services, trial new payment models, and navigate the complexities of healthcare payment systems, all while staying true to their mission of supporting local communities.</p> <p>Upon completion of this course, you will be able to:</p> <ul style="list-style-type: none"> • Differentiate insurance, employer, and consumer payment models. • Identify alternative direct cash pay models, including programmatic payments, bundled services, and subscriptions. • Explore strategies to enhance the patient experience and reduce insurance barriers. • Learn how to integrate expanded professional services, such as nutrition and exercise physiology. • Develop actionable plans to trial and implement direct care models that improve financial outcomes. <p>Content Reference:</p>

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11:00 AM – 12:30 PM	#405	<p>PPS Annual Regulatory and Payment Updates for 2026 Primary Speaker: Rick Gawenda, PT (Gawenda Seminars & Consulting) Co-Speaker: Robert Hall, JD/MPAff (APTA Private Practice)</p> <p>.1 CEUs/ 1.0 Contact Hours</p> <p>Course Level: Beginner</p> <p>Join payment advocacy experts as they provide an update on cutting-edge and timely issues. Topics will include, but are not limited to, fiscla year ICD-10 diagnosis code updates, the annual Medicare update focused on the fee schedule, 2026 annual therapy dollar threshold, 2026 Medicare Part B deductible, telehealth, new, revised, and deleted CPT codes for 2026, and the 2026 Merit-Based Incentive Payment System (MIPS) program.</p> <p>In addition, this session will discuss new issues for members to interact with the Payment Consortium as we expand that group’s goals and chalk up payment advocacy wins across the country. Additionally, this session will focus on how members can enforce their rights under the new Medicare Advantage rules for 2025 to decrease common administrative burdens. Attendees will also be presented with a review of payment advocacy tools like the APTA Value of PT Report and an update of the APTA Private Practice Direct to Employer Services Designation Program.</p> <p><i>Upon completion of this course, you will be able to:</i></p> <ul style="list-style-type: none"> • Articulate 2026 Medicare Physician Fee Schedule Updates and Coding Changes • Understand the recent changes in Utilization Management and Digital Health • Identify where to locate information presented once released by CMS • Identify PPS Payment and Advocacy Resources • List at least 1 proposed change to the 2025 MIPS program <p>Content Reference:</p> <ol style="list-style-type: none"> 1. Centers for Medicare and Medicaid Services. Medicare Benefit Policy Manual: Chapter 15. Section 220-230. Centers for Medicare and Medicaid Services, https://www.cms.gov/Regulations-and-Guidance/Guidance/Manuals/downloads/bp102c15. Accessed 16 Apr. 2025.

		<ol style="list-style-type: none">2. Centers for Medicare and Medicaid Services. Medicare Claims Processing Manual: Chapter 5. Centers for Medicare and Medicaid Services, https://www.cms.gov/Regulations-and-Guidance/Guidance/Manuals/downloads/clm104c05. Accessed 16 Apr. 2025.3. "PPS Payment and Telehealth Resources." Private Practice Section, APTA, https://ppsapta.org/practice-management/payment-resources/. Accessed 16 Apr. 2025.4. "Direct to Employer Services Designation." American Physical Therapy Association Learning Center, https://learningcenter.apta.org/private-practice-D2E. Accessed 16 Apr. 2025.5. Medicare and Medicaid Programs; CY 2025 Payment Policies under the Physician Fee Schedule and Other Changes to Part B Payment and Coverage Policies; Medicare Shared Savings Program Requirements; Medicare Prescription Drug Inflation Rebate Program; and Medicare Overpayments; Proposed Rule. Accessed online on July 12, 2024, https://public-inspection.federalregister.gov/2024-14828.pdf
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Speaker Biographies

Michelle Babcock

Chief Experience Officer | Spooner

Michelle has been a physical therapist since 2001 and joined Spooner in 2004 as a staff therapist. Now serving as Chief Experience Officer, she is committed to ensuring Spooner's strong culture is reflected in the experiences of both patients and employees. Michelle believes physical therapists are uniquely positioned to manage musculoskeletal health and are underutilized as movement specialists in both the community and healthcare system. She is passionate about demonstrating this expertise and continuously seeks innovative ways for Spooner to serve the community.

A natural connector and relationship builder, Michelle strives for personal and professional excellence. She spends much of her time teaching, guiding, and mentoring others—especially in the realm of patient experience. Her work focuses on developing therapists and supporting their growth, helping them find fulfillment in their careers while making a meaningful impact on public health.

Michelle takes great pride in the work of the Spooner team and is excited about the continued opportunity to expand their reach and impact.

She holds a BS in Exercise Science from Wake Forest University and an MS in Physical Therapy from the University of Rhode Island.

Laurence Benz

Founder, Operating Director | Confluent Health

Dr. Laurence (Larry) Benz is a seasoned Executive leader and Board Member. He is the founder of multiple companies, including Confluent Health, a premier provider of musculoskeletal health solutions through over 800 private physical therapy under several industry-leading brand names, digital health (MOVI), advanced education (Evidence In Motion), occupational medicine (Fit For Work, IAA, Worksteps), Post-Acute Care Optimization Solution (IncreMedical), and provider network management (PTPN).

An accomplished speaker, Dr. Benz has delivered more than 250 invited presentations at conferences and educational programs across the country, including engagements in physical therapy, MBA, and Executive Education curricula. He has contributed to the profession through service on the American Physical Therapy Association's Advisory Panel on Practice, the American Board of Physical Therapy Specialties, Foundation for Physical Therapy Research, and Alliance for Physical Therapy Quality and Innovation.

Dr. Benz holds a track record of civic and academic leadership, including past chairmanship at the University of Louisville Board, and current trusteeship at the University of Louisville. He also serves on the boards of the University of Louisville Athletic Association, and UL Health. Recognized with numerous awards in business, leadership, and physical therapy, he is a Catherine Worthingham Fellow and the author of the 2019 bestselling book *Called to Care: A Medical Provider's Guide to Humanizing Healthcare*.

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Dee Bills

Founder and Private Practice Educator | Front Office GURU

As a physical therapist I knew how to help my patients. When I took over the Director of Administration position in my husband's private practice, I quickly realized that my front office team needed help because they didn't have the necessary skills to ensure our patients got the care they needed and deserved. So, I created an entire system of training for my front desk which improved their ability to handle patients from the first call through a successfully completed plan of care.

As a result, our arrival rate increased to over 95% and more patients consistently scheduled and arrived for care! Soon, other practice owners heard about our success and started asking for help. So in 2016, I started Front Office GURU to help private practices get similar results. And in 2020, I rolled out my virtual training platform so physical therapy practices could have a system of consistent training for their front desk, right at their fingertips.

Now, I help physical therapy practice owners provide their front office staff with the necessary tools for successful patient management so they can help more patients to consistently schedule and arrive for care.

Kelly Brown

VP Operations | PredictionHealth

Kelly Brown is a seasoned healthcare leader with over a decade of experience in physical therapy and healthcare operations. She currently serves as Vice President of Operations at PredictionHealth, where she oversees strategic initiatives to enhance client outcomes and operational efficiencies. Previously, Kelly was the Director of Client Success at PredictionHealth, playing a pivotal role in transforming how rehabilitation therapists leverage AI to optimize patient care and streamline documentation.

Before joining PredictionHealth, Kelly dedicated nearly a decade to RET Physical Therapy Group, where she held progressive leadership roles. As Regional Director of Hand Therapy, she led a team of clinicians across multiple locations, implementing innovative care models and driving exceptional patient outcomes. Earlier, she served as Clinic Director, where she honed her skills in team development, clinic management, and patient care excellence.

Kelly began her career as a physical therapist, gaining hands-on experience at Infinity Rehab and RET Physical Therapy Group. She holds a Doctor of Physical Therapy degree from the University of Montana and a Bachelor's in Health and Human Development from Montana State University-Bozeman. A board-certified Orthopaedic Clinical Specialist since 2015, Kelly's expertise in orthopedic rehabilitation has been a cornerstone of her professional journey.

Based in Spokane, Washington, Kelly is passionate about leveraging her clinical expertise and leadership skills to empower teams, improve patient care, and drive innovation in healthcare.

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Ben Carlson

CEO | Carlson ProCare

Ben Carlson, Chief Executive Officer of Carlson ProCare, was born and raised in Connecticut and is an alumnus of the University of Connecticut (UConn). After spending five years in Brooklyn working in film, entertainment, and various startups, he returned home to contribute to the family business. With over six years in business development and three years in business consulting, Ben brings a wealth of experience to his role. He prides himself on being a professional problem solver, ensuring that challenges within the company are addressed swiftly and effectively. Committed to challenging the status quo, continuous learning, and empowering others, Ben is dedicated to enhancing patient experiences and outcomes in healthcare. Outside of work, he enjoys expanding his knowledge, hiking, and writing music.

Peter Cartier

Owner | PT Marketing Pros

Peter Cartier is the Owner and Founder of PT Marketing Pros, a specialized agency dedicated to empowering physical therapy clinics with the tools and strategies necessary to grow their practices and connect with patients actively seeking care.

With years of experience in marketing strategy, search engine optimization, content development, and patient engagement, Peter has built PT Marketing Pros into a trusted partner for physical therapy clinics across the country. His approach is data-driven and results-oriented, yet deeply personal—helping clinic owners navigate the complex world of online marketing so they can focus on what they do best: transforming lives through physical therapy.

Peter's work has been instrumental in helping practices increase their online visibility, attract new patients and staff, and build stronger relationships with their communities. Beyond his technical expertise, Peter is an engaging, down-to-earth speaker, known for breaking down complicated concepts into actionable steps that leave audiences informed, inspired, and ready to take action.

His mission remains to help as many physical therapy leaders as possible understand and adopt the latest trends in digital marketing and user behavior so they can leverage those strategies to improve their online presence and serve more patients seeking help in their neighborhood.

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Charlene Challenger-Smith

Practice Consultant Coach | 8150 Advisors

Charlene Challenger-Smith is passionate about creating a positive impact in the therapy profession through excellence in clinical care and leadership. She has a special interest in coaching owners and leadership teams to maximize staff engagement, drive clinical excellence, optimize systems, and enhance provider compliance.

Char leverages her 20 years of experience as a results-driven, collaborative, and influential leader working in a variety of rehabilitation settings including private outpatient practices, cash-based settings, hospital settings, academic institutions, including for-profit and non-profit entities across multiple states. Char recently served as Director of Rehabilitation at UHealth enhancing clinical operations across 80 providers throughout central Colorado. She has implemented residency programs, developed clinical mentoring framework and created professional development initiatives to drive retention and foster staff and leader development.

Char holds a Masters in Physical Therapy and a BS in human biology from Marquette University. She is a board-certified clinical specialist in sports physical therapy and a certified Athletic Trainer. In her free time, she enjoys running, biking, and spending time outdoors with her husband Jesse and their dog, Citra, in Denver, CO.

Michelle Collie

CEO | Highbar Physical Therapy

Michelle Collie PT, MS, DPT, OCS is a founding member and chair of PPS's Marketing and PR Committee. In this role she has overseen the development of resources to support private practice physical therapists including 'the fit factor', '99 marketing ideas, and' the monthly toolkit'. Most recently, during the COVID pandemic, Michelle has presented in multiple webinars on marketing, telehealth, advocacy, and business management to help private practice physical therapists. She continues to serve on the PPS COVID Advisory Committee. Michelle has written over 40 articles for Impact magazine and presented on all aspects of marketing and communication for physical therapists on multiple occasions at a national level. Michelle is the CEO of a multi-clinic practice with locations in Rhode Island and Massachusetts, Performance Physical Therapy. She is the president for the RI chapter of APTA.

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Jason Collin

Chief Officer of Awesomeness | PT Revolution

Jason Collin is a visionary leader and skilled physical therapist whose passion for building High-Performance Teams led to the founding of PT Revolution in 2020. With a career spanning over two decades, he has trained athletes, built businesses, and fostered a tight-knit culture of excellence. Jason's academic journey includes a kinesiology degree from the University of Colorado, Boulder, and a Master's in Physical Therapy from Regis University (1999). In February 2025, he will defend his doctoral dissertation on how PT leaders enhance engagement and prevent burnout through high-performance teams.

Jason's career began in Hawaii, where he competed in the 2000 Ironman and 2001 Xterra World Championships before opening his first PT and performance center in Southern California. Drawn to the mountains, he moved to Tahoe in 2009, working in leadership for a hospital system before creating PT Revolution – the premier rehab and performance destination for mountain athletes. Beyond PT, Jason has built and sold a successful event company and coached teams in high-performance leadership. A dedicated community member, Jason served as Mayor of South Lake Tahoe during the COVID-19 pandemic and has chaired numerous local organizations. He and his wife Natalie are proud parents of twin boys and are now thriving as vanlifers, empty nesters. Whether biking, skiing, hiking, van-traveling, or enjoying wine, Jason's enthusiasm for life shines through.

Josh D'Angelo

Chief Executive Officer | MovementX

Joshua D'Angelo is a doctor of physical therapy and board certified orthopedic specialist who has co-founded and directed organizations centered around improving access to healthcare and innovating healthcare delivery. Dr. D'Angelo co-founded MovementX, a movement health platform delivering quality physical therapy services whenever and wherever it is needed most.

Dr. D'Angelo also co-founded Move Together, a 501(c)3 non-profit organization whose mission is to increase access to quality rehab medicine around the corner and around the world, where he served as COO until 2021. He co-created the first PT Day of Service, which has united over 20,000 people from 90 countries to give back to their communities. Dr. D'Angelo has served as delegate in the DC Chapter of APTA, as president of APTA's Student Assembly, and as the chair of APTA's New Professionals Committee. Dr. D'Angelo has spoken nationally and internationally on physical therapy, leadership, and global health. He currently serves as CEO of MovementX, as an adjunct faculty at The George Washington University's Doctor of Physical Therapy Program, on the American Physical Therapy Association's Finance Committee, and on the Alumni Council of the Zell Lurie Institute for Entrepreneurship at the University of Michigan.

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Lori Dillon

Chief People Officer | Therapeutic Associates

Lori joined the Therapeutic Associates Physical Therapy team in 2006 after starting her career in non-profit arts administration and as a professional performer. She is currently Therapeutic Associates' Chief People Officer, collaborating with teammates in HR/Recruiting, Learning and Development, and People Data Analytics to ensure that the experience of the people of the organization thrives alongside the financial, operational and customer experience aspects of overall organizational health. In 2012, Lori completed her Masters in Public Administration from the University of Washington. She lives in Seattle with her husband and is a lover of dogs, the arts, enjoying food and fun conversation with others, and the Green Bay Packers.

Jerry Durham

Founder | Client Experience Company

Jerry Durham is a speaker, and consultant with a singular passion for leveraging the entire practice team to improve patient outcomes while driving revenue through better sales processes. With 33 years in Physical Therapy and healthcare, along with 20+ years as a business owner, Jerry has honed his expertise in patient engagement and sales-focused front desk interactions that influence patient decisions throughout their journey. He has spent significant time working directly with patients in the front desk roles. Jerry now leads The Client Experience Company, dedicated to Patient Engagement. The focus is on enhancing patient outcomes and practice profitability by optimizing the Patient Lifecycle through sales-driven strategies at the front desk.

Tim Dwyer

VP of Growth | Prompt Health

Tim Dwyer is an accomplished business development and marketing leader, currently serving as the Vice President of Growth at Prompt Health. In this role, Tim has spearheaded initiatives that drive sustainable growth and innovation, leveraging his extensive expertise in strategic planning and execution. Previously, he served as Director of Operations at BLADE Urban Air Mobility, Inc. from May 2016 to February 2019. During his time there, he played a pivotal role in advancing BLADE's groundbreaking digital approach to short-distance aviation, streamlining operations and enhancing customer experiences. Tim holds a degree from the Fordham Gabelli School of Business, where he developed a strong foundation in business strategy and leadership. With his dynamic professional background, he continues to deliver impactful growth strategies and drive innovation.

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Lisa Flexner

Founder and Principal | FlexHealth Consulting, LLC

Dr. Lisa Flexner, PT, DPT, FAAOMPT, is the Founder and Principal at FlexHealth Consulting (FHC), which helps organizations build their internal health so they can focus on building healthier communities. FHC helps crystallize challenges, build organizational resilience, and innovate on opportunities for growth using a combination of strategic planning and advising, leadership coaching, and change management facilitation.

Dr. Flexner brings 30 years of cross-industry experience and 20 years in healthcare and coaching, as well as degrees in psychology and organizational studies from Stanford University and a Doctor of Physical Therapy degree from the University of Washington. She was the founding Director of Clinical Education for Oregon State University's DPT program and has held academic and clinical roles at Oregon State, the University of Washington, Seattle Children's Hospital, and in private practice. Prior to her clinical training, she led teams and initiatives at Adobe Systems and Accenture. Dr. Flexner has held elected and appointed leadership roles in the APTA-Washington and APTA-Oregon, and co-founded the Physical Therapy in Mental Health Catalyst in the APTA's Academy of Leadership and Innovation. She is a national speaker on issues including clinician and employee mental health, burnout and employee well-being, and combating stigma in healthcare settings.

Jennifer Gamboa

Director of Practice Innovation and Consumer Strategies | Body Dynamics

Jennifer Gamboa, PT, DPT, OCS: Dr. Gamboa is the founding director of Body Dynamics, Inc – Center for Physical Therapy and Wellness in Falls Church, VA. Dr. Gamboa has been practicing for 30 years in a fully direct-to-consumer practice. Dr. Gamboa and her practice have been at the forefront of developing integrated, actionable and accountable interprofessional teams and plans of care to restore, maintain, and enhance physical well-being. BDI joined the Movement for Life family of Clinics in 2024 and Dr. Gamboa has taken on the role of Director of Practice Innovation and Consumer Strategies. Dr. Gamboa is a Fellow of the National Academies of Practice and has lectured extensively on alternative practice models; interprofessional teams for fitness, wellness, and health promotion; and best practices for exercise prescription to modify disease risk.

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Paul Gaspar

President | Independent Physical Therapists of California

Dr. Paul Gaspar, DPT has been practicing physical therapy since 1993. He has served as a professor at 2 physical therapy schools, has authored 2 publications, and serves as President of a private practice with 10 locations, but is perhaps best known for his fierce activism, protecting small physical therapy businesses and their patients. He was one of the longest-serving PT PAC Trustees, held many CPTA Board positions, and has served as the President of the Independent Physical Therapists of California (IPTCA) since 2012. IPTCA, California's private practice coalition, has grown to over 500 members with hundreds of clinics. They have earned multiple victories in the legal, regulatory, public relations, and payment arena. IPTCA has been working closely with APTA, CPTA, and PPS to help expand their winning ways for the benefit of patient care and to prevent our profession from being commoditized by those who wish to exploit it for financial gain.

Rick Gawenda

President | Gawenda Seminars & Consulting, Inc.

RICK GAWENDA, PT, is a licensed physical therapist with over 33 years of experience and currently serves as the founder and President of Gawenda Seminars & Consulting, Inc. He graduated with a Bachelors of Science degree in Physical Therapy from Wayne State University in 1991.

He has provided valuable education and consulting to hospitals, private practices, skilled nursing facilities, and rehabilitation agencies in the areas of CPT coding, ICD-10 coding, billing, documentation compliance, revenue enhancement, practice management, denial management, and remote therapeutic monitoring as they relate to outpatient therapy services. Mr. Gawenda has presented nationally since 2004 and has provided over 1400 on-site seminars and webinars.

Mr. Gawenda is retained by attorneys to serve as an expert in regards to legal or physical therapy state board issues regarding documentation, billing, supervision and utilization of support personnel and compliance with insurance rules and regulations as well as physical therapy state board requirements.

Mr. Gawenda is a member of the APTA and Michigan Physical Therapy Association (MPTA). Mr. Gawenda is a Past President of the Section on Health Policy & Administration of the APTA. Mr. Gawenda is also the Chair of the Payment Policy Committee of the Private Practice Section of APTA.

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Andrew Gorecki

Owner | Superior Physical Therapy

Dr. Andrew Gorecki, DPT, is a leader in physical therapy innovation with over 14 years of experience in outpatient orthopedic practice. As the founder of MovementRx, a cutting-edge Remote Therapeutic Monitoring (RTM) platform, Dr. Gorecki has pioneered the integration of digital health tools to improve patient engagement, adherence, and clinical outcomes.

A Fellow of Applied Functional Science through the Gray Institute, Dr. Gorecki combines deep clinical expertise with a passion for evidence-based innovation. Under their leadership, MovementRx has been implemented in multiple clinics nationwide, supporting over 3,000 patients annually. This experience includes spearheading a 550-patient randomized controlled trial to evaluate RTM's impact on adherence and functional outcomes, providing data-driven insights into RTM's efficacy and financial benefits.

Dr. Gorecki has authored several publications and presented at national conferences, including the APTA Private Practice Section and Ascend Symposium. Topics include digital health innovation, improving patient adherence, and optimizing clinic workflows. Recognized for excellence in clinical outcomes, their practice consistently achieves top scores in Medicare's Merit-Based Incentive Payment System (MIPS).

With a unique blend of clinical expertise, leadership, and technological innovation, Dr. Gorecki is committed to empowering physical therapy practices with actionable strategies to thrive in today's healthcare landscape. Their expertise makes them a sought-after speaker and thought leader on transforming physical therapy practices through RTM and digital health integration.

Seth Greiner

Founder | Greiner Physical Therapy

Seth Greiner is the Founder of Greiner Physical Therapy, a leading provider of outpatient physical therapy. The practice, renowned for its patient-centered approach and exceptional care, has garnered over 200 5-star Google reviews. Greiner Physical Therapy specializes in the rehabilitation management of orthopedic and neurological diagnoses, offering tailored treatments that help patients maximize their ability to move.

Seth graduated cum laude from Boston University in 2005, earning both his Bachelor's and Master's degrees in Physical Therapy. During his time at BU, he obtained his Personal Training Certification from the National Academy of Sports Medicine (NASM), and later became a certified Golf Trainer through the Titleist Performance Institute (TPI). Seth remains dedicated to helping patients achieve their goals by carefully listening to their unique stories. He enjoys working with individuals across all ages and activity levels, from competitive athletes to those exercising for the first time. Seth also serves as the head coach at Rock Steady Boxing Hampton Bays, a non-contact boxing exercise class designed to help people with Parkinson's fight back to maintain strength and independence.

Seth lives in East Quogue, NY, with his wife and two daughters. He enjoys practicing yoga, playing tennis, and spending time with his family.

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Rachel Grubb

Director of Talent Acquisition | Therapy Partner Solutions

Rachel Grubb, PT, DPT

Fellow of the American Academy of Orthopaedic Manual Physical Therapists

Rachel Grubb serves as the talent director at Therapy Partner Solutions (TPS), where she has successfully built and scaled their internal talent department to meet the unique hiring needs of each private practice and contact location throughout multiple states. As a licensed physical therapist with a passion for private practice, Rachel leverages her extensive clinical background and experience as an educator at the University of Tennessee Chattanooga's Doctor of Physical Therapy program to bridge the gap between clinicians and business operations.

Her success stems from her ability to adapt, operationalize, and standardize hiring processes across diverse clinic settings while addressing the unique challenges each practice faces. With a deep understanding of the next generation of therapists, Rachel combines her insight, practical experience, and passion for fostering clinician connections to drive sustainable growth for private practice owners.

Robert Hall

Senior Consultant | APTA Private Practice

Bob Hall helps health professionals maximize their collective impact. He is currently the Executive Chair of Sabre Advocacy, but has also served as the Director of Government Relations for the American Academy of Family Physicians, the access to care lobbyist for the American Academy of Pediatrics, the Director of Government Relations for the National Coalition for Cancer Survivorship, Counsel to US Senator Mark Dayton, Attorney-Advisor to the US Securities and Exchange Commission, and Chief Clerk to the Texas House of Representatives Insurance Committee. He holds a Masters in Public Affairs from the LBJ School of Public Affairs, a Juris Doctor from the University of Texas School of Law and a BA from Haverford College.

Alison Hartman

Managing Partner | Pro-Activity North Carolina

Ali has a deep appreciation for the resilience of the human body and the value of caring for it in all capacities. Specializing in prevention & health promotion in partnership with industrial workforces, Ali most enjoys helping individuals and populations achieve their best, in whatever capacity that means to them. Ali currently serves as lead of Pro-Activity's Southeast operations, managing employer-based prevention and health promotion systems within a variety of industrial workforces. She believes employer-based models free physical therapists and business owners from many of the constraints limiting the profession's potential, and offer a solution for practice owners and individual professionals looking to maximize personal impact and economic potential.

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Kennedy Hawkins

President | Kennedy Hawkins Consulting

Kennedy Hawkins, MBA, JD, LLM was the President & CEO of PT Northwest for 21 years until starting his own consulting firm in 2023. PT Northwest became one of the largest independent outpatient physical rehabilitation groups in the state. He helped PT Northwest become an award winning physical rehabilitation group at the state and national levels. In 2016, 2017, 2018, 2021, & 2022, PT Northwest was named a Top Oregon Workplace by The Oregonian newspaper. Kennedy was instrumental in helping PT Northwest win the National Association of Rehabilitation Agencies (NARA) 2016 Innovation Award. In 2023, Kennedy received Intermountain Healthcare's ROMS Quality Improvement Award.

Along with his consulting work, Kennedy is the Director of the Executive Development Center at Willamette University's Atkinson Graduate School of Management. Kennedy led the development of their Healthcare Leadership Certificate Program, as well as the expansion of the MBA program's executive development offerings. Willamette University is ranked in the top 10% of MBA programs nationally.

Kennedy has 30+ years of experience and has held numerous national leadership positions in the physical rehabilitation industry. Some of those positions include President of the National Association of Rehabilitation Agencies and a task force member of the APTA Key Industry Stakeholder Work Group. He has also severed on many industry work groups. Kennedy is regarded as a "thought leader" in the areas of healthcare and leadership.

Kennedy enjoys snowboarding with his family, hiking behind his in-laws' farm in the Highlands of Scotland, international travel, and mentoring teens and young adults.

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Scott Hebert

CEO | Second Door Health

Scott Hebert is a serial entrepreneur, innovator, and respected leader in the field of PT. Holding a doctorate in physical therapy from Quinnipiac University in CT, he carries with him a deep commitment to revolutionizing patient care, and the business of Physical Therapy.

Scott is currently the CEO and Co-Founder of Second Door Health, a groundbreaking direct care platform that liberates practices from traditional insurance-only models of reimbursement, and fosters a direct link between practices and local employers and consumers.

Prior to Second Door, Scott co-founded and served as CEO of Strive Labs, the PT industry's leading Patient Relationship Management system, a tool used by 1 in 3 physical therapy clinics in the U.S. and over 20 million patients nationwide. Strive Labs was acquired by WebPT, in 2017. While at WebPT, Scott was responsible for launching numerous high impact products at WebPT including WebPT Reach, WebPT HEP, WebPT Local, WebPT Virtual Visits, and WebPT Digital Patient Intake.

Tom Hicks

Certified Public Accountant | J.T. Hicks & Company

J. Thomas Hicks is a seasoned Certified Public Accountant with over 40 years of experience in tax planning, business forecasting, and financial management. As President of J.T. Hicks & Company, P.A., CPAs, Tom has spent three decades supervising and reviewing complex audits, tax returns, and business advisory projects. His expertise lies in guiding businesses—particularly small and medium-sized enterprises—through critical financial decisions, including corporate structuring, tax efficiency strategies, and long-term financial planning.

Tom's extensive career includes leadership roles such as Controller, Treasurer, and Finance Manager, where he oversaw multi-faceted accounting operations, tax compliance, and financial reporting for private companies, public entities, and non-profits. His hands-on experience with tax planning and automated accounting systems consulting has enabled countless businesses to streamline operations and optimize their financial strategies.

In addition to his professional practice, Tom has served as an adjunct faculty member at Husson College, Eastern Maine Community College, and Delaware State Technical College, teaching advanced and introductory accounting courses. He has also shared his expertise through business education initiatives like the Maine Business Incubator Without Walls Project.

Tom's commitment to empowering professionals with knowledge ensures that attendees will leave with actionable strategies to enhance their financial operations and achieve sustainable tax efficiency.

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Chris Hoekstra

Chief Clinical Transformation Officer | Hychara Health

Chris Hoekstra, PT, DPT, PhD, FAAOMPT brings over two decades of expertise in physical therapy, clinical transformation, and healthcare informatics. His career spans leadership roles in diverse organizations, reflecting his commitment to improving healthcare delivery and patient outcomes.

Dr. Hoekstra currently serves as Chief Clinical Transformation Officer at Hychara Health. In this role, he oversees program development, sales and marketing strategy, and advisory services, providing strategic direction for Health IT, Business Intelligence, and IT as a Service. He ensures the organization's products exceed client expectations and advance healthcare delivery.

Additionally, Hoekstra is the Chief Clinical Transformation Officer at Therapeutic Associates Physical Therapy, where he aligns clinical workflows with information systems to optimize care delivery. He leads the Business Intelligence and Innovation Department, focusing on data-driven insights and patient-centric care.

Hoekstra is also an Assistant Professor at Oregon Health & Science University, teaching qualitative research methods and organizational behavior while researching clinical information systems and medical scribe safety. He was also a Faculty Instructor at the North American Institute of Orthopaedic Manual Therapy (NAIOMT) for over 15 years.

Chris's career reflects his dedication to blending clinical expertise with informatics innovation to advance healthcare practices.

Heidi Jannenga

Co-founder and Chief Clinical Officer | WebPT

Dr. Heidi Jannenga, PT, DPT, is the Co-Founder and Chief Clinical Officer of WebPT, the leading software platform for physical, occupational and speech therapists driving delivering cutting-edge solutions and an unwavering passion for optimizing the practice and provider experience.

She has been recognized as one of Health Data Management's Most Powerful Women in Healthcare IT, a Most Admired Leader by the Phoenix Business Journal and was previously honored as the Ed Denison Business Leader of the Year at the Arizona Technology Council's Governor's Celebration of Innovation. She is a proud member of the YPO Arizona Gold Chapter.

Heidi's impact on the healthcare industry is not limited to her professional endeavors. Her newest venture, Rizing Tide, champions inclusive excellence in the healthcare workforce through a scholarship program aimed at empowering physical therapy students and residents. As a dedicated advocate of entrepreneurship and its power to transform communities, she created her own investment fund called Rootstock Ventures that deploys early stage capital as an LP and directly to founders in the SaaS and healthcare space. She is also a founding member of the Arizona chapter of Golden Seeds, an early stage investment firm focusing on women founders and leaders creating lasting impact.

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Kendell Jno-Finn

Principle | M3 Performance and Physical Therapy

Kendell was born in Dominica, West Indies and came to Birmingham from St. Croix in 1999 to attend Samford University. While at Samford, Kendell was a member of the track and field team and earned a Bachelor's in Education with a concentration in Exercise Science. He then attended The University of Alabama in Birmingham (UAB) and received his Doctorate in Physical Therapy in 2007. Kendell founded M3 Endeavors, a performance venture in 2015 and in 2018 expanded the company to include physical therapy and Pilates. Kendell serves as Balanced Body Educator in addition to writing for both Impact Magazine and The Core. M3 Performance and Physical Therapy now operates across a few platforms in the Birmingham area. He has a passion for evaluating movement in those who desire to live active lives and developing programs to improve their skill and performance. When not in the clinic you can find him on the golf course or developing new recipes in the kitchen.

Lindsay Keisman

Business Coach | Practice Freedom U

Licensed Clinical Professional Counselor | Leadership Strategist | Business Development Expert | Public speaker

With over 15 years of experience, Lindsay is a seasoned leader specializing in team development, strategic management, and private practice growth. As a licensed clinical professional counselor, she brings a unique blend of empathy and business acumen to empower leaders, strengthen teams, and drive sustainable success.

She has successfully scaled multiple practices by focusing on empowerment, transparent performance metrics, and sustainable leadership.

Her expertise includes strategic planning, executive coaching, emerging leadership development, human resources functions, hosting groups to facilitate transformative experiences for business owners, and public speaking. She is certified in administering DiSC assessments and 360-degree feedback, offering personalized insights to enhance team dynamics and leadership effectiveness.

As the Owner and CEO of Pivotal Counseling Center since 2016, Lindsay oversees multiple locations across Illinois. She leads a dedicated team to deliver exceptional healthcare, while managing networking, marketing, expansion planning, HR functions, and financial operations for a thriving 7-figure business.

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Lindsey D. Kenny

Co-owner | Kenny & Associates Physical Therapy

Dr. Lindsey Kenny, PT, DPT is a physical therapist, clinic owner, and advocate for active aging. With over 15 years of clinical experience, she owns and operates Kenny & Associates Physical Therapy, a 20-year-old community-centered practice she acquired in 2024. Lindsey specializes in working with older adults and individuals with neuromuscular disorders, including Parkinson's Disease, with a focus on fall prevention, balance, and functional strength.

Her philosophy is rooted in the belief that aging is an active process and not a limitation. She empowers her patients to remain strong, independent, and confident through movement-driven care.

Lindsey holds a Doctorate of Physical Therapy and an Interdisciplinary Graduate Certificate in Aging from UNC-Chapel Hill. She is certified in PWR! Moves, the Otago Exercise Program, blood flow restriction therapy, dry needling, and more.

Rich Kenny

Co-owner; Chief Clinical Officer | Kenny & Associates Physical Therapy; Veritas Labs

Rich Kenny, MMCI, RN, brings over 20 years of healthcare experience to the intersection of clinical practice and technology innovation. As a dynamic nurse leader, Rich has evolved from hands-on clinical roles as an ICU, ER, and Flight nurse to becoming a pioneering force in healthcare technology implementation. For the past decade, he has driven digital transformation initiatives at major healthcare institutions including Duke Health, MD Anderson, HCA, and Ascension, specializing in analytics and AI implementation.

A thought leader in the Coalition for Health AI and armed with advanced degrees from Duke University, Rich combines deep healthcare operational knowledge with practical technology expertise developed through roles at PwC and SAS. Currently serving as the inaugural Chief Clinical Officer for Veritas Labs, a Silicon Valley tech company, Rich leads product strategies for AI solutions that enhance healthcare delivery while maintaining the human connection.

As a private practice owner, together with his wife, Rich brings a unique perspective on implementing AI tools in small healthcare settings. He regularly speaks on AI implementation in healthcare, helping organizations navigate the practical challenges of adopting these technologies while maintaining focus on quality care delivery. His approach emphasizes making AI accessible and practical for healthcare providers, regardless of their technical background.

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Amy Lafko

CEO | Cairn Consulting Solutions

Amy Lafko is a leadership and organizational design expert, mainstage speaker, author, and facilitator. Known for her “People First” method, she brings a step-by-step process to put employee engagement and empowerment into practice. Having spent 20+ years in healthcare leadership roles, her work is inspired by her personal transformation as a leader. That inspiration and her energy is multiplied every time she assists someone with their own shift in mindset and intentions.

Her book, *People First: A Proven Method for an Exceptional Healthcare Practice* was an Amazon bestselling new release. In addition to founding Cairn Consulting Solutions, LLC, she is certified by AQai for AQme (Adaptability Assessment) and TTI Success Insights for DISC, Driving Forces and Emotional Intelligence. Amy has earned her MSPT from Ithaca College, her MBA from Loyola University of MD.

David Light

Co - Founder | Healthcare Accounting Solutions, LLP

David’s Healthcare Professional and executive experience spans over the last 2 decades. He has worked in multiple healthcare systems (as an employee, consultant, and/or owner) in both for profit and not for profit entities, on local and national engagements.

He possesses exceptional problem solving and communication skills that allow him to effectively demonstrate the ability to increase growth of existing programs, develop new programs, direct multiple revenue producing clinics and programs, exceed regulatory compliance standards, and beat budgeted expectations.

As a doctoral level Physical Therapist, David has the unique ability to relate and rationalize the clinical components of an engagement while balancing the situational economics of the organization. He received his B.S from the University of Florida, MPT and DPT from the University of St. Augustine, and MBA from Palm Beach Atlantic University.

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Karen Litzy

Owner, Physical Therapist | Karen Litzy Physical Therapy, PLLC

Dr. Karen Litzy is a licensed physical therapist, international speaker, and owner of Karen Litzy Physical Therapy, PLLC. Her prestigious client roster includes Fortune 500 CEOs, royalty, and celebrities, whom she has helped overcome painful conditions, recover from surgery, and achieve optimal strength. As host of "Healthy Wealthy & Smart," a top 200 podcast on Apple Podcasts, Dr. Litzy interviews leading health, medicine, and entrepreneurship influencers.

A sought-after keynote and featured speaker, Dr. Litzy has addressed thousands at prestigious events worldwide, including the International Olympic Committee World Conference on Prevention of Injury and Illness in Sport in Monaco, various APTA and APTA Private Practice events, and the World Congress on Sports Physical Therapy.

She is a member of Prevention Magazine's Medical Review Board and has been featured in The Washington Post, Time Magazine, Prevention Magazine, Good Housekeeping, and more.

Meg MacPherson

Co-founder / CEO | Articulate Design + Consulting

Meg has deep roots in the health + wellness world; first as a varsity athlete, then as a Physical Therapist and clinic owner, and now as a clinic designer. After opening and operating her own PT practice in 2014, she gained a reputation for creating a space that was innovative in both function and design. This was the foundation of creating a niche clinic design firm, Articulate Design + Consulting. It is through her unique lens as a practitioner that allows her to create spaces that maximize revenue, translate a brand experience, and appeal to both clinicians and clients alike. She, along with her partner and team, have designed clinical spaces around the world. She firmly believes that inspired spaces inspire and the health care field has a massive opportunity to create spaces that compliment the services provided, innovate through the integration of technology, and to break the mould of traditional clinical environments.

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Theresa Marko

Founder | Marko Physical Therapy, PLLC

Dr. Theresa Marko, PT, DPT, MS, OCS, is the owner of Marko Physical Therapy, a boutique private practice in New York City specializing in orthopedics and pediatrics.

In addition to clinical work, she is an adjunct faculty member at Touro University Manhattan and Tufts University Seattle, and she serves as a spokesperson for the APTA Media Corps. Dr. Marko is deeply involved in advocacy and professional service, currently serving on the APTA Private Practice Section's Government Affairs Committee and the Finance Committee of the Academy of Orthopaedic Physical Therapy. She's been New York's Federal Affairs Liaison since 2019 and has served as a delegate to the APTA House of Delegates for the past seven years.

She is currently pursuing her Doctor of Education in Interdisciplinary Leadership at Creighton University. Dr. Marko is passionate about advancing the profession through leadership, education, and healthcare reform.

Paul Martin

President | Martin Healthcare Advisors

Paul Martin is a seasoned entrepreneur, consultant, and leader in the rehabilitation industry with over three decades of experience. In 1993, Paul embarked on an ambitious journey to grow his 3-clinic rehab company in New Jersey. Over the next three years, he successfully added 18 new clinics, culminating in a strategic partnership with NovaCare in 1996.

Building on this foundation, Paul founded Martin Healthcare Advisors (MHA) in 2000, a premier consulting and M&A advisory firm exclusively serving the rehabilitation industry. Under Paul's leadership, MHA has helped over 500 rehabilitation business owners achieve their goals through strategic planning, operational excellence, and successful mergers and acquisitions. Today, MHA completes more rehab deals annually than any other firm, thanks to Paul's unparalleled expertise and dedication.

As a consultant, mentor, and sought-after speaker, Paul leverages his extensive experience in business development, transactions, and operations to guide business owners in creating significant organizational value. His insights, informed by daily conversations with top industry CEOs and featured in his acclaimed video podcast series, empower PT business owners to prepare for transformative partnerships that align with their vision and values.

Paul's passion for the rehab industry is evident in his unwavering commitment to helping PT business owners achieve their dreams and beyond. Whether guiding growth strategies or navigating complex M&A processes, Paul's dedication, market knowledge, and hands-on approach make him a trusted advisor and advocate for success.

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Orlando, Florida
ROSEN SHINGLE CREEK

APTA Private Practice
2025 Annual Conference
and Exhibition
November 12-15, 2025



Sara Mikulsky

Founder | Sara Mikulsky Wellness Physical Therapy, PLLC

Inspired by her injuries as a high school athlete, Sara went to Boston University to study in the physical therapy program. Here, she earned her three degrees in health and physical therapy. While in school, she also received her personal training certification to start working with clients in the health industry. Over the years, she has gained experience in many settings and techniques. Sara has worked all over the country including California and New York. Through this experience she has been able to collaborate with world-renowned surgeons and physicians including those who work with the NFL and MLB. She has also been affiliated with the HSS Rehab Network and the Mt Sinai Rehabilitation Center. Additionally, Sara has become a Nutrition Specialist and an Ergonomic Specialist. Sara has also been a contributor to many popular publications such as US News & World Report, MSN, Spine Universe, and Cosmo Magazine. Sara opened her practice in 2016 to offer a more holistic approach to healthcare. She believes in providing lifestyle medicine to improve health -- treating and focusing on exercise, diet, sleep, and stress relief.

Ellen Morello

US General Manager | EverEx

Dr. Ellen Morello, PT, DPT, is a physical therapist passionate about implementing innovative tech solutions in PT practice. She is an experienced HealthTech leader and has been involved on the ground floor of multiple high-growth HealthTech startups, including Physera, Nice Healthcare, Second Door Health, and EverEx. She has been practicing telehealth PT since 2017 and is an APTA Telehealth Certificate series instructor.

A graduate of New York Medical College, Dr. Morello has also served as adjunct faculty at New York Medical College and UMass Lowell. She holds multiple state licenses and is an active member of the APTA and co-chair of the APTA FiRST council.

Roshan Nanu

Lead AI Engineer & Strategist | Prompt Therapy Solutions

As a leader in AI innovation, Roshan Nanu's unique expertise in transforming outpatient rehabilitation practices is underpinned by a Ph.D. in Neuroscience and a rich multidisciplinary platform of physics, machine learning, and engineering. Having helped launch AI initiatives with numerous enterprise companies, Roshan is now the Lead AI Engineer & Strategist at Prompt Therapy Solutions pioneering AI solutions to challenges and opportunities arising within physical therapy. His work focuses on leveraging AI to streamline operations, enhance clinician productivity, and deliver data-driven strategies that improve patient outcomes and drive business growth. With deep expertise in healthcare technology and implementation, Roshan advises organizations on how to adopt smooth integrations of AI into workflows for a whole new perspective on managing and delivering care.

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Angela Pennisi

Managing Partner | Angela Wilson Pennisi & Associates, PC

Angela Wilson Pennisi, PT, DPT, MS, is a Board-Certified Clinical Specialist in Orthopedic Physical Therapy. She founded PhysioPartners, an outpatient clinic with 3 Chicago-area locations, and served as President and Chief Executive Officer for nearly 25 years. Dr. Pennisi is Certified in Healthcare Compliance by the Health Care Compliance Association and consults with practice owners and administrators on compliance, strategic planning and management issues.

Dr. Pennisi graduated from the Program for Physical Therapy at Columbia University in New York, New York. She completed her transitional Doctorate of Physical Therapy in 2021 with Arcadia University. Dr. Pennisi has served on several professional boards, is a past Vice President of APTA Private Practice and currently serves as Secretary of the International Private Physiotherapy Association. She is APTA's Alternate Advisor to the American Medical Association's Relative Value Scale Update Committee.

Holly Petersen

Senior Business Coach | 8150 Advisors

Holly is passionate about empowering practice owners to enhance the quality of care, streamline operations, and develop their teams to grow practice value. As the Director of Operational Excellence and Compliance for the largest provider of physical therapy and chiropractic services in the Northeast, she drove improvement in clinician training, patient experience, compliance, and M&A diligence and integration. With more than a decade of experience in outpatient physical therapy, management, and corporate leadership, Holly has a deep understanding of the challenges and opportunities facing leaders in outpatient physical therapy.

Holly holds a Bachelor of Health Science and a Doctor of Physical Therapy from Nazareth University in Rochester, NY. In her free time, she enjoys spending time with her husband and two daughters and cycling to support the Pan-Mass Challenge, raising funds to support cancer research and treatment at Dana-Farber Cancer Institute in Boston, MA.

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Matt Phifer

Co-Founder | StretchPlex

Matt started his career as a PT aide at Performance Physical Therapy, then elevated to Director of Fitness services before becoming co-founder and COO of StretchPlex.

Jennifer Raams

Business Coach | Practice Freedom U

Jennifer Raams is an entrepreneur with two decades of healthcare leadership experience. She is passionate about guiding and empowering leaders at every stage through individualized coaching that enhances leadership skills, emotional intelligence, and strategic thinking.

As the former owner, COO of JacoRehab, she led a team of 60 employees, prioritizing people to foster a culture of care and collaboration while driving productivity and profitability. Company growth was achieved by raising others up and ensuring everyone's contributions were valued.

At their physical therapy company, she demonstrated exceptional skill in sales and marketing, consistently generating a steady stream of referrals.

Jennifer led learning and development initiatives, established a successful succession team, and has demonstrated versatility in effective leadership during an acquisition. Having navigated everyday challenges, she is skilled at handling tough conversations while focusing on solutions and collective success. As an entrepreneur, facilitator, and experienced leader, she focuses on being solution oriented to solve complex problems.

Her human-centered approach helps leaders feel fulfilled, connect with purpose, and create a culture of collaboration beyond profit.

As a consultant, Jennifer helps organizations attract, engage, and retain top talent through effective onboarding, system creation, team building, career planning and company succession planning and scaling.

Her purpose is to inspire others to unlock their full potential and create lasting transformative change.

Stephen Rapposelli

Co-Founder | Performance Physical Therapy

Stephen co-founded his outpatient practice in 1992, adding fitness services in 2000, before pivoting to creating cash based wellness services after Co-Vid in 2021. He is past President of APTA DE, and served on PPS Nominating Committee, Peer to Peer Network, and contributor to Impact Magazine. He and his business partner also provide executive business coaching.

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Kevin Reynolds

Co Founder | Healthcare Accounting Solutions, LLP

With more than 25 years of experience in public accounting, Kevin assists clients with guidance on corporate structuring and governance, profitability/scalability analysis, cash flow planning, compensation agreements, succession planning, and due diligence, in addition to tax planning and compliance services.

Kevin utilizes his experience to share thought leadership on industry trends in mergers and acquisitions, succession planning, income tax planning, and managerial finance as a speaker at conferences, roundtable discussion forum leader and recurring panelist.

His desire to help small to mid-sized healthcare practices fueled the move to start Healthcare Accounting Solutions, LLP. He felt the larger accounting firms did not allow this intentional engagement at the small business level.

Nicola Robertson

Physiotherapist | Diamond Physiotherapy

Nicola is a well-respected women's health physiotherapist. She is passionate about empowering her clients to reach their goals.

Nicola earned a BSc in Sports Science and Physiology (2002) and a BSc Hons Physiotherapy (2006) at the University of Glasgow. After an official move to Canada in 2008, Nicola joined a multidisciplinary health team in Nova Scotia, which initiated an extensive foundation of diverse healthcare practices. Her previous experience has included working in high-level sports (soccer and Ice hockey). She currently is a teaching assistant for Antony Lo and Pelvic Health Solution and teaches at the PTA/OTALoyalist College, Belleville, Ontario, and is an Adjunct academic staff in the School of Rehabilitation Therapy at Queens University, Kingston

Nicola lives in Stirling with her husband and two children, who share her love of being active.

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Kelly Sanders

President | Movement for Life

Kelly serves as the President of Movement for Life Physical Therapy, which is an employee-owned company that operates outpatient clinics in Arizona, California, North Carolina & Virginia as well as a software platform, Everflex, that uses the power of the AOPT's Clinical Practice Guidelines to support management of common musculoskeletal conditions. She started her career at a certified athletic trainer and entered PT school at the University of Southern California while also working for their outreach program as a high school athletic trainer. Since graduating from physical therapy school, Kelly has worked in orthopedic physical therapy with a special interest in geriatrics. She has been involved in her local community with organizations such as the Red Cross, the Noor Foundation which provides free physical therapy to local under and uninsured community members as well as CASA, an organization that assists abused and neglected children. Kelly has also had the opportunity to be active in the APTA Private Practice Section including serving on the Impact Editorial Board as well as the payment policy, value based care, telehealth and COVID-19 task forces and committees. Most recently, she is serving as a Director on the APTA Private Practice Section's Board of Directors.

Susan Sanford

Owner/CEO | Vineyard Complementary Medicine

Susan graduated from the University of Connecticut with a Bachelor of Science in Physical Therapy in 1994, The New England School of Acupuncture with a Master of Science in Acupuncture in 2002, in 2010 Susan earned an advanced Sports Medicine Acupuncture Certification and in 2022 her Doctorate Degree in Physical Therapy. Susan has been an Adjunct Faculty Instructor for the New England School of Acupuncture and Massachusetts College of Pharmacy and Health Sciences, has co-authored articles in the Journal of Complementary and Alternative Medicine, (Cupping and Subacute Lower Back Pain), The Journal of Podiatric Medicine (Short Limb, Heel Lifts Not so Fast) and presented at the American Chiropractic Board of Sports Physicians, for the American Board of Podiatric Medicine and for The Kansas State APTA. Susan, her husband and 2 teenagers have made Martha's Vineyard, Massachusetts her home since 1997. In 2003, Susan founded Vineyard Complementary Medicine, an orthopedic outpatient private practice specializing in interprofessional and collaborative care providing physical therapy, acupuncture, and massage and is one of the few clinics in the country offering Medicare acupuncture for chronic lower back pain. Susan is a fitness enthusiast and loves spending time traveling, going to the beach, golfing, and skiing.

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Member of the American Physical Therapy Association

Brandon Seigel

Chief Problem Solver | Wellness Works Management Partners

Brandon Seigel is a bestselling author, internationally recognized private practice guru, and the President of Wellness Works Management Partners. Seigel brings over twenty years of executive leadership experience. Throughout his storied career, Seigel has empowered healthcare systems and private practices throughout the United States to streamline operations, build winning teams, implement effective business models, and ultimately transform archaic systems into innovative success. Seigel consults to over 700 healthcare organizations and has built a revolutionary deconstructed MSO which is transforming the way healthcare is delivered.

Katherine Shephard

Founder/CEO/Physical Therapist | New Normal Physical Therapy

BA Politics and International Relations - Scripps College, Claremont, CA (2004)

Doctor of Physical Therapy - St. Catherine University, St. Paul, MN (2016)

Founder/Owner - New Normal Physical Therapy, Edina, MN (2020)

Dr. Katherine Shephard is a dedicated pelvic health physical therapist practicing at New Normal PT and MetroPartners OBGYN. A proud graduate of St. Catherine University, she frequently returns to her alma mater as a lecturer, sharing her expertise with DPT and PTA students. Additionally, she serves as a teaching assistant for pelvic health continuing education courses, including those by Herman & Wallace as well as Antony Lo.

Dr. Shephard is a passionate advocate for improving communication in healthcare, emphasizing its critical role in enhancing outcomes for both providers and patients. As a sought-after speaker, she addresses the art and science of communication, inspiring healthcare professionals to build trust, foster collaboration, and navigate difficult conversations effectively.

Outside of her professional endeavors, Dr. Shephard is a mom of three and resides in Minnesota, where she balances her career with the joys of family life.

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Nathan Shields

Founder | Private Practice Owners Club Podcast & Coaching

Nathan Shields, PT, ECS

Nathan Shields is a physical therapist, entrepreneur, and industry leader with over 25 years of experience in clinical practice and business ownership. As a board-certified Electromyographic Clinical Specialist (ECS) and founder of the Private Practice Owners Club Podcast & Coaching business, Nathan empowers private practice owners to achieve profitability and leadership success.

After earning his Master of Physical Therapy (MPT) degree from Northern Arizona University in 1999, Nathan built a career spanning outpatient orthopedics, neurodiagnostics, and private practice management. He founded his first clinic in 2002 and went on to own and operate four clinics, which he sold in 2018 for three times the national average valuation. He later exited his neurodiagnostics business in 2024.

Through the Private Practice Owners Club, Nathan has coached hundreds of practice owners and reached thousands of listeners with his podcast, sharing actionable strategies for business growth. Featuring conversations with top industry leaders, the podcast equips healthcare entrepreneurs with the tools to build thriving businesses.

Furthermore, Nathan has been a speaker, presenting at conferences, webinars, and live events to inspire physical therapy practice owners to elevate their impact through better business ownership.

Outside of work, Nathan enjoys spending time with his wife and seven children, serving in his church, playing golf, and investing in real estate.

Connect on LinkedIn: [linkedin.com/in/nathanshieldspt](https://www.linkedin.com/in/nathanshieldspt)

Gwen Simons

Lawyer | Simons & Associates Law, P.A.

Gwen Simons, Esq, PT, OCS, FAAOMPT is a healthcare lawyer at Simons & Associates Law in Scarborough, Maine. She has served on PPS and AOPT task forces on payment and utilization management issues.

She also serves as the lobbyist for the Maine Chapter APTA and the Executive Director of the Northeast Private Practice Network. Gwen is an expert on the appeals rules under the Affordable Care Act and Medicare Advantage Plans and has represented patients in independent external reviews. Her appeals strategies have worked in Maine to influence one payer to stop requiring prior authorization altogether. She was the 2023 recipient of the Maine Chapter's President's Service Award for her advocacy work to pass Maine legislation to prohibit insurance carrier prior authorization requirements before visit 12.

Paul Singh

CEO | StrataPT

Paul is an active angel investor (3,200+ startups over the past 15+ years) and operator (CEO of StrataPT).

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Tim Spooner

CEO | Spooner; Solveglobal

Tim Spooner, PT, FAFS is the founder and CEO of Spooner, a growing outpatient orthopedic and sports medicine practice with nearly 30 clinics across Arizona and Texas. Since opening in 1990, Tim has built Spooner around the belief that every individual should be empowered to achieve health through movement. His vision and leadership have created a culture where motion is embraced as foundational to health—in the clinic, in business, and in life.

As both a physical therapist and a CEO, Tim offers a unique perspective on solving the rising cost of musculoskeletal disorders (MSDs) in the workforce. Experiencing firsthand how traditional healthcare models failed his own company, he launched solveglobal®, a proactive MSD solution designed to reduce employer healthcare costs while improving employee health and productivity.

Tim believes movement specialists are uniquely equipped to improve the health of our society at both the individual and population levels. His mission is to elevate their role in value-based care and transform how MSDs are addressed nationwide.

He holds a Bachelor of Science in Physical Therapy from the University of North Dakota and earned a Fellowship in Applied Functional Science (AFS) through the Gray Institute.

Steve Stalzer

CEO | 8150 ADVISORS

Steve is an experience M&A Advisor with a passion for helping owners build practice value and realize that value when the time is right. he has over 20 years of healthcare leadership and M&A experience including roles as co-owner of a 30 clinic practice and founder / CEO of 8150 Advisors.

Following the successful sale of Proaxis Therapy in 2015, Steve launched 8150 Advisors where he specializes in the sale of physical therapy practices. He holds an MBA for the University of Colorado as well as an MS in Physical Therapy and BS in Organizational Psychology from the University of South Dakota. Steve resides near Vail, CO.

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Jody Swearingen

Vice President of Client Compliance | Business and Clinical Management Services (BCMS)

Dr. Jody Swearingen is a respected outpatient physical therapist and the Vice President of Client Compliance for Business and Clinical Management Services, LLC. He has most recently served as Chief Clinical Officer at TopPT, a leading outpatient clinic he co-founded and managed. With a career spanning over two decades, Jody is known for his expertise and commitment to advancing the field of PT. He earned his Master's in PT from the University of TN at Chattanooga in 2002 and later completed his Doctorate at the University of St. Augustine. Jody holds Board Certification in Orthopedics, specialty certification in Sports Therapy, and his Orthopedic Manual Therapy Certification from Maitland Seminars. He is also a certified HIPAA Professional.

Jody's career includes a significant role as the Director of Clinical Compliance for a major outpatient physical therapy network in the Southeast, responsible for overseeing the compliance of over 700 therapists and assistants. His work involved creating and implementing policies and procedures, training staff in billing, coding, and documentation, and managing audits and regulatory updates.

Active in professional organizations, Jody serves as Vice President / President-elect for the APTA-TN Chapter.

Dr. Swearingen is an experienced speaker, presenting compliance topics at state and national conferences.

Neil Trickett

CEO | Practice Promotions

Neil Trickett is a physical therapist, former private practice owner, and private practice marketing expert. He is the founder of Practice Promotions, LLC, a multi-seven-figure digital marketing agency, servicing over 1200 clinic locations across the U.S. and Canada. He advises marketing strategies to clinics of all sizes, including enterprise rehabilitation clinics.

He also hosts the practice marketing podcast, and has been on the Amazon best-seller author list for his collaborative book "Change Agents".

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Matthew VanderKooi

CEO/ Founder | New Life Physical Therapy and Sports Medicine/ Solveglobal

Matt's business experience includes over 25 years in industry and physical therapy practice. He has pursued and achieved specialization in his field. He has taught, consulted, and lectured regionally and nationally in university, professional association, and business settings.

In 2002, Matt founded NewLife Physical Therapy, a practice grounded in empowering clients to do the important things in life worth doing. New Life Physical Therapy has grown to multiple clinical practices and multiple multistate direct to employer contracts.

In 2007 he co-founded Solveglobal LLC which helps regional, national, and global employers control musculoskeletal (MSD) related health care spending. Experience as a business owner, consumer, and clinician, with the acumen honed by working directly with employers from multiple settings, have given Matt a full spectrum view of health care. His passion to change the health care experience, to improve our populations' health, and to lower health care costs has driven him to seek, develop, and implement entrepreneurial and innovative solutions for employers and consumers.

Nick Weber

CEO | Team Rehabilitation

Nick Weber serves as the Chief Executive Officer of Team Rehabilitation Services, a premier provider of physical therapy services. With over 27 years of clinical expertise and nearly two decades in leadership, Weber combines deep industry knowledge with a proven track record of driving growth and operational excellence.

Weber holds a Master of Science in Physical Therapy and is a certified Athletic Trainer, credentials that have shaped his patient-centered approach and leadership philosophy. Since joining Team Rehab in 2009 as a Clinic Director and Partner, he has consistently delivered exceptional outcomes, spearheading year-over-year growth while building a strong reputation for high-quality care within the community. His leadership trajectory within the organization includes serving as Vice President of Indiana Operations and Chief Operating Officer, culminating in his appointment as CEO in 2024.

As CEO, Weber has been instrumental in expanding Team Rehab's footprint while maintaining its commitment to exceptional patient care and fostering a supportive, employee-owned culture. His dedication to advancing the physical therapy profession and nurturing a culture of excellence continues to position Team Rehab as an industry leader.

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Brian Weidner

President | Career Tree Network

Brian Weidner is the President of Career Tree Network. Since 2007, Brian and his team have supported the recruitment and hiring efforts of healthcare organizations across 46 states. Career Tree Network specializes in Physical Therapist recruitment for all practice settings.

Brian is the lead author of "200 WORDS: Essential Career Advice for Therapy Professionals", a comprehensive guide to help therapy professionals navigate the job search process.

Brian graduated from Bradley University with a degree in Business Management and an emphasis in Human Resources. He later graduated from University of Wisconsin-Milwaukee with his Masters in Business Administration. Outside of the office, you might find him playing princess with his daughters, watching James Bond movies or eating sushi.

Paul Welk

Attorney | Tucker Arensberg

Paul Welk, PT, JD is an attorney at Tucker Arensberg, P.C. in Pittsburgh, Pennsylvania. He focuses his legal practice in the areas of business and health care law and in this capacity frequently represents physical therapists, rehabilitation providers, and professional organizations. Paul is legal counsel for American Physical Therapy Association - Pennsylvania and has provided legal services to the APTA and a number of its chapters. He is the founding author of The Legal Impact, a regular column in the APTA Private Practice Section's Impact Magazine. Paul lectures regularly at professional association events, colleges, and universities.

Stephanie Weyrauch

Physical Therapist | MovementX

Dr. Stephanie Weyrauch is a physical therapist at MovementX in Billings, MT. Dr. Weyrauch earned her Doctorate in Physical Therapy and Master of Science in Clinical Investigation from Washington University in St. Louis. She specializes in pelvic health and orthopedic physical therapy.

In addition to clinical work, Dr. Weyrauch is a highly sought-after speaker and consultant on topics like burnout, workplace injury prevention, and generational issues. Her expertise has been featured in national media, including NPR, Kaiser Health News, NBC News, Glamour, and Self. She is also the co-host of the popular Healthy, Wealthy, and Smart podcast, a top-rated show with over 10 million downloads that offers insights on healthcare, business, and personal growth.

Dr. Weyrauch has served in many leadership roles in the American Physical Therapy Association and APTA Private Practice including the Chair for the Nominating Committee for APTA and APTA Private Practice. Dr. Weyrauch currently serves on APTA Private Practice Impact Editorial Board.

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Kristen Wilson

Co-Owner | Action Potential

Kristen Wilson is Co-Owner of Action Potential Physical Therapy, a one on one outpatient private practice with three locations in southeastern Pennsylvania. She is passionate about private practice and supports APTA PPS with many speaking and leadership contributions and as a pilot member of the Peer2Peer Networks group. Having learned the hard way over her 14+ years of ownership, Kristen has created a steadfast process for operating her private practice that she loves to share with other entrepreneurs. Kristen enjoys speaking and is a natural educator, offering an opportunity for an interactive and dynamic presentation.

Robert Worth

President/CEO | Advanced Physical Therapy & Sports Medicine

Dr. Worth graduated from the University of Wisconsin–LaCrosse, double majoring in physical therapy and psychology, received his Master's in orthopedic PT from the University of St. Augustine and his DPT from Massachusetts General Institute of Health Professions. He has been in private practice since establishing Advanced Physical Therapy & Sports Medicine in 1998, with 27 clinics in northeast/central Wisconsin, 5 on-site clinics at YMCA's and providing on-site care for 40+ companies and municipalities. Rob has presented at the APTA Innovation Summit and his practice was selected as the 2013 Private Practice of the Year by the APTA Private Practice Section. In addition to his private practice, teaching at two universities and an orthopedic residency program, and leading international medical missionary work, he is an active member of the APTA and currently serves as a Director on the APTA Private Practice Section Board of Directors. Dr. Worth has received the APTA Wisconsin Outstanding Service Award and IndUS International Award for cross-cultural contributions in healthcare.

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Submit

2025 Education Session Evaluation

Tuesday, April 1st

8:30 AM – 2:00 PM

(PC) Kick-Starting Your Private Practice: A Day of Interactive Consulting (Separately Ticketed Event)

Pre-Conference Speaker: Robert P. Worth, PT, DPT – Advanced Physical Therapy & Sports Medicine

Pre-Conference Speaker: Michelle E. Collie, PT, DPT, MS – Highbar Physical Therapy

Pre-Conference Speaker: Josh D'Angelo, PT, DPT – MovementX

Pre-Conference Speaker: Paul J. Welk, PT, JD – Tucker Arensberg

Learning Objectives

1. Develop or enhance vision, mission, and short/long-term goals for future business; develop/ enhance business plan including vision, executive summary, market analysis, marketing, service description, human resources, and facility layout/design.
2. Describe how new practices can choose business structures that match state regulations, strategic vision, and financial plans for the organization.
3. Create a marketing plan and define the needs of healthcare consumers that influence healthcare buying decisions.
4. Identify areas of risk and opportunity within the business structure and systems, various types of contracts, and the basics of billing and collections, ranging from traditional fee-for-service insurance to bundled payment to cash-based to direct-to-employer contracting.

NPS

How likely are you to recommend this course to another physical therapist in business, on a scale from 0 to 10, where 0 means 'Not at all likely' and 10 means 'Extremely likely'?" (Required)

0
 1
 2
 3
 4
 5
 6
 7
 8
 9
 10



Pre-Conference Speaker

Robert Worth, PT, DPT

Advanced Physical Therapy & Sports Medicine

Session Content

The speaker(s) were knowledgeable about the subject matter (Required)

- Strongly Agree
- Agree
- Neutral
- Disagree
- Strongly Disagree



Pre-Conference Speaker

Michelle Collie, PT, DPT, MS

Highbar Physical Therapy

Session Content

The speaker(s) were knowledgeable about the subject matter (Required)

- Strongly Agree
- Agree

- Neutral
- Disagree
- Strongly Disagree



Pre-Conference Speaker
Josh D'Angelo, PT, DPT
MovementX

Session Content

The speaker(s) were knowledgeable about the subject matter (Required)

- Strongly Agree
- Agree
- Neutral
- Disagree
- Strongly Disagree



Pre-Conference Speaker
Paul Welk, PT, JD
Tucker Arensberg

Session Content

The speaker(s) were knowledgeable about the subject matter (Required)

- Strongly Agree
- Agree
- Neutral
- Disagree
- Strongly Disagree

Session Content

The session met my expectations. (Required)

- Strongly Agree
- Agree
- Neutral
- Disagree
- Strongly Disagree

The session's content provided a comprehensive understanding of the theory, skills, and techniques. (Required)

- Strongly Agree

- Agree
 - Neutral
 - Disagree
 - Strongly Disagree
-

The session met its stated objectives. (Required)

- Strongly Agree
 - Agree
 - Neutral
 - Disagree
 - Strongly Disagree
-

Evidence was provided to substantiate the material presented. (Required)

- Strongly Agree
 - Agree
 - Neutral
 - Disagree
 - Strongly Disagree
-

I will use the information presented to change my practice. (Required)

- Strongly Agree
- Agree
- Neutral
- Disagree
- Strongly Disagree

Was a commercial product promoted? (Not including sponsor ads) (Required)

- Yes
- No
- Not Applicable

What was the most valuable part of the session for you? (Required)

Enter response here...

What could be improved in this session? (Required)

Enter response here...

Comments

Please provide any additional comments or suggestions below **Skip**

Enter response here...

Submit

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