



# Merage Institute

US-Israel Innovation Bridge  
Executive Leadership Program

**2012**

**July 15 – July 27**

## Welcome from the Merage Institute CEO and Executive Director

Dear Participants,

I would like to welcome you to the US-Israel Innovation Bridge Executive Leadership Program for the Israeli executives.. Over the past years we have had the privilege and honor of sharing this program with more than 200 Israeli executives who have become Merage fellows.

For me and my family this has been a wonderful and rewarding experience. We have met some of Israel's best and brightest and have established warm friendships with many. But the most rewarding to us has been the response we have received from the executives who have, in many cases, found the two weeks they have spent here "a life changing experience."

We have now further enhanced this program based on comments and observation of the previous fellows. It has been carefully and painstakingly constructed to provide you with real life, practical tools to enhance your strategic understanding of the American market.

I am personally looking forward to meeting you in the coming weeks and welcoming you to the program and to our home.

Paul Merage



CEO and Executive Director  
Merage Institute

Dear Participant:

On behalf of Katherine, Paul, and Lilly Merage I am pleased to send you the schedule for the Merage Institute's Business Leadership Training Program, which will take place **July 15 through July 27, 2012** in Irvine, California.

The faculty is amongst the best in the United States. You will train with top business school professors, respected CEOs, and leading practitioners. You will also have the opportunity to learn from business experiences of community leaders over evening dinners.

You will find all the pre-reading material and other useful information at the Merage Institute's Website: [www.merageinstitute.org](http://www.merageinstitute.org). We have planned some leisure activities for you, but your schedule will be intense during both weeks. The schedule below is divided into carefully integrated modules ranging from general marketing to business development principles and strategies applicable to the US market. All sessions will take place at the Fairmont Hotel conference room. Evenings will be informal. Dinners will be generally hosted in private homes, and will be followed by discussions with top leaders in the community.

Throughout the program you will be staying at the **Fairmont Hotel** 4500 MacArthur Boulevard, Newport Beach, California 92660. Phone: (949) 476-2001. Please be sure to arrive in time for an informal gathering and dinner being held on Sunday evening, **July 15** at 18:30, where we will meet in the lobby of the hotel.

All daytime sessions will be held at Fairmont Hotel. Dress for days and evenings will be informal or casual. Pack work-out clothes if you desire to exercise. It could get cool, particularly at night, so bring a light jacket or sweater. Please let us know in advance if you require special dietary meals. Breakfast during the week will be at 7am in a separate room set up for us. Morning sessions will start promptly at 8am. *Most evenings we will meet directly outside the hotel.* Vans will pick us up and take us to dinner and evening sessions. Pick up times will be promptly at 6:30 p.m.

If you have any further questions about the program, please feel free to contact us: Yishay Aizik ([yaizik@merageinstitute.org](mailto:yaizik@merageinstitute.org)) Israel: 03-7229878 California: 949-7017576 or Kristie Eidlhuber ([KEidlhuber@merageinstitute.org](mailto:KEidlhuber@merageinstitute.org)).

We look forward to your visit.  
Sincerely,

Yishay Aizik,  
Director Merage Institute,  
*US-Israel Innovation Bridge*

## Week One: July 15-21

	Morning	Afternoon	Evening
<b>Sun 15</b>	Arriving to Irvine checking in at the Fairmount Hotel		<b>6:30pm</b> Welcome Dinner at the Hotel with Paul Merage and Faculty
	Breakfast: HOTEL	Lunch: HOTEL	
<b>Mon 16</b>	<b>8:00am-12:00 noon</b> <b>Marketing</b> Imran Currim	<b>1:00pm-5:00pm</b> <b>Marketing</b> - continued Imran Currim	<b>7:00pm</b> Dinner hosted by Welcome Dinner hosted by <b>Paul and Lilly Merage</b> Presentation: Paul Merage
	Breakfast: HOTEL	Lunch: HOTEL	
<b>Tues 17</b>	<b>8:00am-12:00 noon</b> <b>Marketing</b> - continued Imran Currim	<b>1:00pm-5:00pm</b> <b>Presentation Skills &amp; Elevator Pitch</b> Joel Calvo	<b>7:00pm</b> Dinner hosted by <b>Nancy and Irv Chase</b> Presentation: Mitchell Brin Chief Scientist, Allergan The Story of Botox
	Breakfast: HOTEL	Lunch: HOTEL	
<b>Wed 18</b>	<b>8:00am-12:00 noon</b> <b>Branding</b> Sasha Strauss	<b>1:00pm-5:00pm</b> <b>Presentation Skills &amp; Elevator Pitch</b> - continued Joel Calvo	<b>7:00pm</b> Dinner hosted by <b>Carol and Marc Richmond</b> Presentation: Marc Richmond, The Health Care System
	Breakfast: HOTEL	Lunch: HOTEL	
<b>Thurs 19</b>	<b>8:00am-12:00 noon</b> <b>Negotiation</b> Lisa Baron	<b>1:00pm-5:00pm</b> <b>Negotiation</b> - continued Lisa Baron	<b>7:00pm</b> Dinner hosted by <b>Nancy and Mike Meyer</b> Presentation: Jim Mazzo President, Abbott Medical Optics
	Breakfast: HOTEL	Lunch: HOTEL	
<b>Fri 20</b>	<b>8:00am-12:00 noon</b> <b>Strategic networking</b> Bruce Money	<b>1:00pm-5:00pm</b> <b>Strategic networking</b> - continued Bruce Money	<b>7:00pm</b> Dinner and Services – <b>University Synagogue</b>
<b>Sat 21</b>	<i>Rest or free time for shopping/sightseeing/ exercise</i>		<b>15:00 pm – 20:00pm</b> Beach Party hosted by <b>Eyal and Yael Aronoff</b> The Benefit and Cost of Strategic Planning

## Week Two: July 22-27

	Morning	Afternoon	Evening	
Sun 22	9:30am – 10:30am Medical Start Up Companies Amir Lerman	Rest or free time for shopping/sightseeing/ exercise 15:00pm meet at Hotel lobby - leave for LA	4:00pm-21:00pm Dinner and Networking Event American-Israeli Medical Association	
Breakfast: HOTEL		Lunch: HOTEL		
Mon 23	8:00am-12.00 noon Business Strategy Leonard Lane	1:00pm-5:00pm Business Strategy – continued Leonard Lane	6.30pm Dinner hosted by Dana and Mark Susson	
Breakfast: HOTEL		Lunch: HOTEL		
Tues 24	8:00am-12:00 noon Business Strategy – continued Leonard Lane	1:00pm—5:00pm Balanced Scorecard Bill Somers	6.30pm Dinner hosted by Katherine Merage Presentation: Mike Mussallem Chairman & CEO Edwards Lifesciences	
Breakfast: HOTEL		Lunch: HOTEL		
Wed 25	8:00am-12:00 noon Critical Thinking & Decision Making Tom Eppel	Lunch with Michal Miasnik, West Coast Representative, BIRD Foundation	1:00pm-5:00pm Medical Device Start- ups in the Cardiology space - Lesson learned from recent successes and failures case studies EGlick	6.30pm Dinner hosted by Sue and Ralph Stern Presentation: Ralph Stern Leadership
Breakfast: HOTEL		Lunch: HOTEL		
Thurs 26	8:00am-12:00 noon FDAs Regulatory Pathways to Medical Device Marketing in the United States Ed Allera	1:00pm-5:00pm Supply Chain Management Mike Aghajaian	6.30pm Graduation and Farewell Dinner hosted by Katherine Merage, Paul Lilly Merage the Ritz Restaurant	
Breakfast: HOTEL		Lunch HOTEL		
Fri 27	8:00am-10:00am Innovation – Medical Devices Stan Rowe	10:00am-2:30pm with lunch US HealthCare System and the Reimbursement Process Rod Benson	2:30pm Panel of Experts	4.30pm  - THE END –

## Module Details

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### **MODULE: Marketing, Sales and Distribution**

Dr. Imran Currim

<http://web.gsm.uci.edu/~currim/>

Monday, July 16: 8:00-12:00 and 1:00-5:00

Tuesday, July 17: 8:00-12:00

### **Marketing Strategy**

This module will help Israeli business people understand and develop alternative marketing strategies for U.S. markets. We will focus on organic growth, when companies grow through existing or new products or services in existing or new markets. Discussions will cover securing new markets through expanding geographically and targeting new segments (or customers). Learning is facilitated through a combination of readings, case discussions, and an assignment.

### **Text, Articles, and Cases**

1. An Export Marketing Plan for Small Companies, *International Trade FORUM*, 2, 1995.
2. *Strategic Marketing Management*, 6th Edition, 2001, John Wiley and Sons, New York.
3. "The Brand Report Card," *Harvard Business Review*, January-February 2000, p. 147-57.

\*4. Biopure, *Harvard Business School Case* 9-598-150.

\*5. Invisalign, *Kellogg Business School Northwestern University Case* KEL032-PDF-ENG

\*I hope you can read items 4 and 5 before my Monday-Tuesday (July 16/17th) session and briefly write your thoughts on each of the questions on the case (see below). This is important for the group discussion. Items 3, 4, and 5 can be ordered from [www.hbsp.com](http://www.hbsp.com) (Harvard Business School Publishing).

While it is preferable that other items are read before the two-day session, it is not necessary. However I recommend these items (particularly item 2) be read after you return to Israel. You may be able to find Item 2 (a paperback) in Israel at a lower price. Alternatively it can be ordered from [www.amazon.com](http://www.amazon.com) although they may take some time to ship your order. If some of item 2 can be read before my two-day session I recommend you read Chapters 11, 12, 9, 2, 3, 4, 5, 6, 7 (ordered from most important to important), or any subset of these chapters. Our discussion will focus on how the concepts in these chapters are being used, have been used, and can be used in specific company settings.

## **Monday, July 16**

### **8.00 – 12.00 Introduction, Alternative Growth Strategies, Honda Motor Car Company**

#### **1.00 – 2.30 Biopure**

1. How do you assess Biopure's potential in the human market? The animal market?
2. What are the biggest obstacles to Biopure's success in the human market? The animal market?
3. How might Oxyglobin be a threat to Hemopure? How might it be an asset to Hemopure?
4. What should Biopure do regarding the commercial release of Oxyglobin? If they release, what price should they set? How should it be distributed?

#### **2.45 -5.00 Invisalign**

1. Diagram Invisalign's channel structure for the (a) promotion selling cycle and (b) ordering/physical possession cycle.
2. What channel functions and flows are performed by each channel member for Invisalign and the traditional braces market?
3. Are there any gaps in the channel? Are channel members performing functions that Invisalign intends them to? If not, why not?
4. Are channel power sources affecting Invisalign's success? If so, how?
5. What would you do to ramp up conversion from generation of interest to capture?

## **Tuesday, July 17**

### **8.00 – 12.00 Customization of Marketing Strategies and Group Discussion**

8:00 – 8:15 We will make a list of Israeli products or services for export. The participants will be divided into groups. Each group will select a product or service offered by a group member firm for export.

8:15 – 10:00 Dr. Currim will lead a brainstorming session on key questions and methodology for development of export plan

10:00 – 11:00 Group Develops Marketing Strategy for Israeli Exports to the U.S.

Each group will come up with:

- (a) key questions to be answered in order to judge the export potential of the product or service, to be summarized on 1-2 transparencies, and
- (b) an outline of a process or methodology for answering the key questions, to be summarized on 1-2 transparencies.

11:15 – 12:00 Group Presentations and Discussion

Each group will present the output of the 9.45-10.45 session, followed by a discussion on how the questions and methodology can be enhanced (15-20 minutes per group).

## **MODULE: Presentation Skills and Elevator Pitch**

Joel Calvo

### **Module Description:**

Creating Your Elevator Pitch:

An elevator speech is an elevator statement that is indispensable tool for promoting you and your business. It is as essential as your business card. What is an elevator speech? Simply put, it is a concise, carefully planned, and well-practiced description about you and your company that your mother should be able to understand in the time it would take to ride up an elevator. In this session you will learn to write and present your personalized Elevator Speech.

## **MODULE: Branding**

Sasha Strauss

### **Module Description:**

A rich introduction to all things branding — from naming and brand architecture to visual design and brand extension. We'll look at why brands matter, who they matter to, how you can build them into your marketing, advertising and public relations strategies. A great start for professional communicators or those simply interested in brand strategy.

## **MODULE: Negotiations**

Lisa A. Barron, Ph.D., MBA

### **Module Description:**

The purpose of this module is to provide opportunities for participants to develop their negotiating abilities for use in organizational and other settings. The module is premised on the assumption that negotiating concepts are best learned through practice grounded in rigorous analysis and reflection. Theoretical principles and concepts from various reference disciplines (such as social psychology, sociology, and economics) will be presented through lectures and readings, with the focus primarily on improving practical skills through participation in simulations. Participants will not only learn to enhance their individual abilities in dyadic and group situations, but also to analyze contexts for the most effective application of these skills.

### **Negotiation Curriculum:**

1. What is negotiation?
2. What is a negotiation issue?
3. Distributive vs. Integrative Negotiations
4. Interests and Positions
  - explanation
  - exercises (these will involve generic situations)
  - wide application of interest and position concepts



5. Additional negotiation concepts
  - Negotiation Issues
  - BATNA
  - Target
  - Reservation price
6. How to prepare - introduction to the prep sheet
7. Negotiation simulation
  - prepare in dyads
  - negotiate in dyads (privately)
  - group debrief
8. “Informal” negotiations – how to use concepts in situations that don’t necessarily present as negotiations
9. Advanced techniques for multiple-issue negotiations
10. Questions, review, wrap-up

### **MODULE: Strategic Networking**

Bruce Money

#### **Module Description:**

This module focuses on networking in a strategic sense; that is, how to form and utilize connections with people for successful entry and growth. As the saying goes, it’s not *what* you know, it’s *who* you know. When it comes to networks, it’s sometimes *how* you know them as well. In the vast market of the U.S., learning the strategic aspects of forming the right kinds of relationships is important to success of Israeli ventures in America. Through case studies, simulations, and other examples, we review and explore the frameworks that govern how action-oriented networks are formed and maintained. Participants will analyze various types of networks and their relevance to Israelis (e.g., product- or service-oriented, community, Jewish leaders, professional, etc.). You will also identify and discuss strategies relevant to Israeli business operating in U.S. regarding creating and sustaining networks. Learning how networks operate demonstrates that, as in many areas of business, advantage may not go to the one with the most resources, but rather to the one who knows what’s going on.

A few pre-readings and a case for this course will be sent to you by the Merage Foundation. Dr. Money will give you other articles at the seminar.

#### **Pre-Readings (*Please read before the module begins.*)**

“How Leaders Create and Use Networks,” by H. Ibarra and M. Hunter, *Harvard Business Review*, January 2007.

“A Blueprint for Constructing a Personal and Professional Network,” by T. Krattenmaker, *Harvard Management Communication Newsletter*, April 2002, Harvard Business School Publishing.

“Heidi Roizen,” Harvard Business School Case 9-800-228, by Nicole Tempest, 2000, Harvard Business School Publishing. This is a case study about a successful venture capitalist in Silicon Valley who is a very active networker

*Please read through the case and prepare to discuss the following questions:*

1. What are the strengths of Roizen's network as we see it at the end of the case. The weaknesses?
2. What specific steps did Roizen take to develop her network? To maintain it?
3. What strategic lessons can you apply from Roizen's experience to your own networking efforts for marketing, financing and other help?

## **Seminar Outline**

8:00-12:00

### The Nature of Networking Concepts

- The "small world" phenomenon
- Networking vocabulary
- Strong vs. weak ties
- The power of "structural ho

### Networking Tools

- Types of networks
- Building and managing your network
- Currencies of network exchange (the right kind of reciprocity)
- Avoiding the "top dog" syndrome

### Networking Vehicles

- Wider-scope networks (community, government, etc.)
- Cross-cultural networking considerations
- Specific networking help for Israeli companies in the U.S.
- Strategic blogging

1:00-4:30

### Putting Networks to Work for Your Business

- Industry examples of how networks have assisted businesses in U.S.
- Harvard and other case study examples from Israel companies
- Hypothetical mini-cases for networking strategies in various business stages of start-up, growth, etc.

### Presenting Your Own Strategic Networking Plan

Based on course learning tools, participants will formulate and present briefly (seven minutes or so) a strategic networking plan for preferably an actual business for a specific business need or situation (marketing, capital, etc.).

Questions to be considered include:

1. Who are the types of people you eventually need to contact?
2. Through what strategic network will you contact them?
3. What will you specifically do to make contact and follow up?

As a class we will listen to the plans, provide feedback, etc.

## Other Readings

### *Business Press/Newspaper Articles* (to be distributed in class)

"The Power of Networks," special issue of *Forbes*, May 7, 2007 (selected articles)

"How to Network—And Enjoy It," *Fortune*, April 4, 2005

"Passengers Are Cleared to Network about the Cabin," *New York Times*, September 14, 2004.

"The Fine Art of Following Up," *Business Week*, October 21, 2002.

"Bridging the Gap," *Entrepreneur*, November, 2004.

### *Academic Articles* (for perusal only—to be distributed in class)

"Making Invisible Work Visible: Using Social Network Analysis to Support Strategic Collaboration," by R. Cross, S. Borgatti, and A. Parker, *California Management Review*, Winter 2002.

"Explorations of National Culture and Word-of-Mouth Referral Behavior in the Purchase of Industrial Services in the United States and Japan," by B. Money, M. Gilly and J. Graham, *Journal of Marketing*, October 1998.

### *Other Harvard/Stanford Readings* (Recommended for further reading—can be ordered online from HBS Publishing website, [www.hbsp.com](http://www.hbsp.com))

"Discovery Skill #4: Networking-How Interacting with People Outside Your Social and Professional Spheres Can Jump-Start Innovation" by Jeffrey H. Dyer, Hal B. Gregersen, Clayton M. Christensen, 2011, in *The Innovator's DNA*, Harvard Business School Publishing.

"A Note on Social Networks and Network Structure" by Jeffrey Pfeffer, 2008, Stanford Business School, available from Harvard Business School Publishing.

"How to Build Your Network" by Brian Uzzi and Shannon Dunlap, *Harvard Business Review*, December 2005, Harvard Business School Publishing.

"Are You Ready to Get Serious About Networking?" by S. Parker, *Harvard Management Communication Newsletter*, February 2003, Harvard Business School Publishing.

"The Science of Networking," by L. Gary, *Harvard Management Update*, January 2004, Harvard Business School Publishing.

"Note on Industry Peer Networks," by S. Sgourev, 2002, Stanford Business School, available from Harvard Business School Publishing.

"Can a Shy Person Learn to Network?" by H. Ibarra, *Harvard Management Update*, September 1996, Harvard Business School Publishing.

### *Books on Networking* (Recommended for further reading—can be ordered online at [www.amazon.com](http://www.amazon.com) or from other booksellers)

*The Hidden Power of Social Networks*, by R. Cross and A. Parker, 2004, Harvard Business School Press, ISBN: 159139270.

*Power Networking*, 2nd Edition, by D. Fisher, S. Vilas, 2000, Bard Press, ISBN: 1885167474.

*Hidden Assets: Harnessing the Power of Informal Networks*, by C. Ehin, 2004, Springer-Verlag Telos, ISBN: 1402080816.

## **MODULE: Business Strategy**

Leonard Lane

### **Module Description:**

The focus of this module is on competitive strategy. The objectives are to provide knowledge of successful techniques for strategy formulation and strategy implementation. To analyze competitive strategy it is essential to understand the structure of an industry, the evolution of this structure and the pattern of interaction among the competitors in the industry.

The module is designed to improve your decision-making in a competitive and dynamic environment where competition means the goal of every business is to gain and sustain an advantage over rivals. Therefore, our approach is practical and problem-oriented. A major part of the module will involve applying concepts, frameworks, analytical techniques and managerial insights to the strategic issues which your companies are facing.

### **The Concept of Strategy**

**8:00 – 12:00**

**Read:** Crafting Strategy by Henry Mintzberg

**Read:** What is strategy by Michael Porter

**Read:** Can You Say What your Strategy Is? HBR, April 2008, Collis and Rukstad

The first module will address key elements of strategy along with two exercises to support our discussions. We will address the definition of strategy and its relation to competitive advantage and identification of an intensity of rivalry in the technology industry in the United States. An exercise will be conducted amongst participants to define the industry segments in which you compete and who has the power in those segments. Based on this exercise we will then have a discussion on how to identify and exploit competitive advantage.

### **Analyzing Resources and Capabilities**

**1:00 – 5:00**

**Read:** Competing on Resources

**Read:** The Core competence of the corporation

**Read:** Creating Competitive Advantage, HBS press, Product 9-798-062

**Read:** Drug Eluting Stents: A paradigm shift in the Medical Device Industry: Case: OIT-50 The afternoon session will be devoted to understanding how to compete on your resources and capabilities. The focus will be identification of your company's drivers, assumptions, capabilities and current strategy in relation to developing a future strategy to exploit your competitive advantage in the U.S. market.

**Group Exercise:** Identification of resources and capabilities in relation to market opportunities – your strategic fit.

## **Application to the Medical Device Industry**

**8:00 – 12:00**

### **Read: Acumen Fund and Embrace: From the Leading Edge of Social Venture**

**Investing** Discussion of the industry and product life cycles, as well as critical success factors, required at different stages of the industry and product life cycle. The final portion of this module will be devoted to an exercise in which participants will identify the critical success factors needed at each stage of their product life cycle and prepare a summary plan on how to focus the necessary resources and capabilities on achieving these critical success factors.

## **MODULE: BALANCED SCORECARD**

Bill Somers

### **Module Description:**

The objective of this module is to introduce the concept of the Balanced Scorecard, one of the most widely used Performance Management tools in business today. The Balanced Scorecard seeks to identify and measure a small number of financial and non-financial metrics appropriate for the business. These measures should provide an overall view of how the business is performing and where management attention should be focused.

This module will review the philosophy of Balanced Scorecards and how they have evolved since they were introduced 20 years ago. We will define the key perspectives that should be reflected when designing a Balanced Scorecard and cover how a Balanced Scorecard process is implemented.

## **MODULE: CRITICAL THINKING & DECISION MAKING**

Thomas Eppel

### **Module Description:**

Sound decision-making and critical thinking have always been important skills for creating success. In a world that has become increasingly complex and that is changing at an ever-increasing pace, these skills are even more important than ever before. Yet, too many individuals and organizations are ill prepared when it comes to making smart decisions and how to critically examine the abundance of data and information that is all around us.

This module gives an overview of the art and science of decision-making and critical thinking. It provides the motivation to view decision situations as opportunities rather than problems and to view decision making as a skill that can be learned, practiced and improved upon like any other skill. It also discusses the many pitfalls and psychological biases that have a tremendous impact on our thinking and decision-making and have led to new fields such as behavioral economics and behavioral finance.

### **Selected Readings:**

Book: Smart Choices, A Practical Guide to Making Better Life Decisions by John S. Hammond, Ralph L. Keeney and Howard Raiffa.

## **MODULE: Medical Device Start-ups: Case Studies**

Gilad Glick

### **Module Description:**

**missing**

## **MODULE: Supply Chain Management**

Mike Aghajanian

### **Module Description:**

The objective of this module is to introduce the basic concepts of supply chain management and explore techniques to leverage the supply chain for strategic advantage.

In this module, we will define the elements that make up a supply chain, demonstrate its central and strategic role in product based companies, explore through simulation the effects of various supply chain structures on cost and customer satisfaction, present key metrics for measuring supply chain performance, and investigate risks and risk mitigate strategies associated with a global footprint

### **Selected Readings:**

**Book:** The Goal, A Process of Ongoing Improvement by Eli Goldratt

## **MODULE: FDA's Regulatory Pathways to Medical Device Marketing in the United States**

Edward John Allera

### **Module Description:**

- Overview of medical device regulatory processes in the United States.
- Use and design of computerized systems in clinical trials.
- Important issues in the premarket design and analysis of device trials.
- Synopsis of quality systems and import requirements for medical devices.
- Development process of a post-marketing plan including the post approval study outline.
- Review clinical case studies involving medical devices.
- Best practices and tips to prepare for good clinical practice inspections.

## **MODULE: US Health Care System & Reimbursement Process**

Rodney L. Benson

### **Module Description:**

This training will provide an overview of the major public health care programs in the United States, Medicare and Medicaid. The content of this training will be as follows:

- Overview of health care in the United States
  - Discuss health care expenditures
  - Discuss the demographics of the populations that rely upon public programs for health care
- Introduction of the Medicare and Medicaid programs
  - General description of programs
  - Statutory and regulatory authorities
- Discussion of Medicare
  - Part A – Hospital Insurance
    - Services provided under Part A
    - Beneficiary eligibility requirements
    - Provider enrollment
    - Reimbursement under Part A
  - Part B – Medical Insurance
    - Services provided under Part B
    - Beneficiary eligibility requirements
    - Provider enrollment
    - Reimbursement under Part B
    - Enrollment in Part A and Part B
  - Part C – Medicare Advantage
    - General description of Medicare Advantage
    - Discussion of Medicare Advantage plans and how they enroll in the Medicare program
    - Description of services provided under Part C of Medicare
    - Payments to Medicare Advantage plans
    - Discussion of beneficiary election periods
  - Part D – Prescription Drug Benefit
    - General description of Part D
    - Beneficiary enrollment
    - Prescription Drug Plan application process
    - Description of the services provided under Part D
  - Medigap
    - Discuss options available to Medicare beneficiaries to purchase supplemental insurance
    - Describe how Medigap policies fill gaps in Medicare coverage
- Discussion of Medicaid
  - General overview of Medicaid

- Discussion of Medicaid grants and the Federal Government's sharing in State Medicaid costs
- Discussion of how individuals qualify for Medicaid
- Discussion of mandatory services under Medicaid
- Description of other services that states may choose to provide
- Discussion of Medicaid coverage for Medicare beneficiaries (dual eligible)
- Discussion of other significant developments related to the public funding of health care
  - Electronic health records
    - Overview of EHR and importance to health care
    - Meaningful use requirements
    - Discussion of the Medicare EHR Incentive Program
    - Discussion of the Medicaid EHR Incentive Program
- Health care reform
  - General introduction of the Affordable Care Act
  - Discussion of Health Care Exchanges
  - Discussion of other significant provisions of ACA, including Medicare payment reforms and innovation

**GUEST LECTURE: Innovation**

Stanton Rowe

**GUEST LECTURE: Medical Start Up Companies**

Amir Lerman

**GUEST LECTURE: The Story of BOTOX®**

Mitchell Brin

**GUEST LECTURE: BIRD Foundation**

Michal Miasnik

**GUEST LECTURE: President and Chief Executive officer of City of Hope, a cancer research and treatment institution**

Michael A. Friedman

**GUEST LECTURE: Edwards Lifesciences**

Mike Mussallem

**GUEST LECTURE: Abbott Medical Optics**

Jim Mazzo



## Professors and Presenters

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**Mike Aghajanian**

**Title:** Executive Director

**Department:** Executive Education Programs

**Email:** [michael.aghajianian@uci.edu](mailto:michael.aghajianian@uci.edu)

Mike Aghajanian is currently the Executive Director of the Office of Executive Education for the Merage School of Business at the University of California, Irvine (UCI). In this role he is responsible for the development and delivery of high quality non-degree related education to the Southern California Business Community.

In addition to his role at UCI, Mike serves as Chairman of the Board for Cimtek, Inc. a Toronto based leader in functional testing of high reliability electronics, on the Board of Directors of Nexiant, Inc. in Irvine California, a leading provider of MRO inventory solutions and on the Board of Directors for OCTANe (Orange County Technology Action Network) an organization devoted to fueling technology growth in Orange County.

Mike recently retired as the President and CEO of PRTM Management Consultants. PRTM has more than 800 consultants in 19 offices worldwide, PRTM is globally recognized as the leading management consultant in the area of operational strategy, supply chain management, product innovation, and customer experience excellence.

Aghajanian has over 25 years of consulting and industry experience. He joined PRTM in 1991 and held a variety of roles of increasing responsibility. Among his many accomplishments, Mike led the firm's expansion into and within Asia; established The Performance Measurement Group, a wholly owned subsidiary of PRTM, well known for its extensive industry benchmarks; and co-led the team that developed the Supply Chain Operations Reference (SCOR) model -- a widely used and effective tool to tune global supply chains.

Mike earned an MBA with a concentration in Technology Management from the University of California, Irvine, and a BS in Management Engineering from Worcester Polytechnic Institute in Massachusetts.



**Edward John Allera**

**Title:** Co-Managing Shareholder, Buchanan Ingersoll & Rooney PC,  
Washington, DC Office

**Email:** [edward.allera@bipc.com](mailto:edward.allera@bipc.com)

Edward John Allera focuses his practice on the development of new products and business opportunities in the areas of pharmaceuticals and technology, especially

regarding the regulation and promotion of drugs, biologics and devices. Ed is a managing shareholder of the Washington, D.C., office of Buchanan Ingersoll & Rooney PC, as well as chairman of the firm's FDA/Biotechnology Section.

He began his career at the Food and Drug Administration (FDA), where he served as associate chief counsel. As a pharmacist, one of Ed's strengths is the ability to integrate science into the law to combat ill-considered FDA actions. He also has a cadre of experts with whom he works that enables him to create rapid, sophisticated legal/scientific rebuttals to FDA actions. He has worked extensively in the product life cycle management area and with almost every dosage form. Because he has a background in the science surrounding dosage forms and pharmacokinetics, he has filed a large number of Citizen Petitions in the product life cycle management process.



**Lisa Barron**

**Title:** Senior Lecturer, Negotiations

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Dr. Lisa Barron is a faculty member of Organization and Management at The Paul Merage School of Business, University of California, Irvine. Her teaching interests focus on creativity, negotiation, communication, organizational behavior and leadership. She has taught negotiation and leadership techniques to members of large and small organizations including Microsoft, Medtronic, Ingram Micro,

State Street, MicroSemi, and Boeing and to executives, career counselors, undergraduate and graduate students, academic staff and faculty. Her current coaching work focuses on helping executives and doctors become more effective leaders, communicators and problem-solvers.

Lisa's research has been published in the journals *Human Relations*, *Career Development International*, and *Journal of Management Inquiry* and has been written about or recognized in *The Boston Globe*, *The Washington Post*, *The New York Times*, *Glamour*, *The Huffington Post*, and the *Orange County Register*. In addition, she has appeared on radio programs for WBUR, KNX, CBS and NPR.

Lisa's negotiation courses and workshops focus on developing people's ability to better understand their underlying interests and negotiate effectively. Her creativity courses focus on developing people's ability to think creatively and to use that thinking to solve problems. She also coaches executives and doctors regarding development of their leadership abilities.

Lisa has taught graduate and undergraduate courses in organizational behavior and negotiation at Pepperdine University, The Claremont Graduate School and The Paul Merage School of Business at

University of California, Irvine and Executive Education at UCLA and UCI. She has taught negotiation workshops at UCLA, CalTech, UCI, the Keck Graduate School and Utah State University.

Lisa has received sixteen teaching awards for her negotiation and her strategic communication courses. In addition to her academic experience, Dr. Barron has worked as an advisor to undergraduates and as a consultant and trainer at the Data Center at Stanford University. She also has experience marketing IT training programs.

Lisa is a member of the Academy of Management, the American Psychological Association, and the Association for Psychological Types. She is also a certified mediator. She has reviewed for leading journals in the fields of Management and Psychology. She received her Ph.D. in Organizational Behavior from The Anderson School at UCLA.

In addition, she has an MBA from The Anderson School at UCLA and a BA in Psychology and English from Stanford University.

She loves to travel, cook (and eat), cycle, read, scuba dive, draw, paint and collect handmade earrings and folk art.



**Rodney L. Benson**

**Title:** Counsel, Buchanan Ingersoll & Rooney PC, Washington, DC Office Counsel

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Rodney L. Benson has more than 35 years as a government senior executive and highly-experienced government contracts attorney with a distinguished career of federal government service. He has been acknowledged for his exceptional ability to counsel staff and clients on complex legal matters, as well as possesses extensive experience in defending federal agencies in protests and disputes, with a remarkable record of success.

Immediately prior to joining Buchanan, Rod served for 13 years as director of the Office of Acquisition and Grants Management at the United States Department of Health and Human Services (HHS). Through Rod's 30+ years of combined experience as the director of Acquisitions and Grants Management for the Centers for Medicare and Medicaid Services (CMS) and as a senior attorney in the Department of Health and Human Services Office of the General Counsel representing CMS, he has developed considerable expertise in the field of federal acquisition. He has also acquired extensive knowledge of CMS's programs and organization.



**Mitchell Brin, MD, FAAN**

**Sr. VP Global Drug Development & Chief Scientific Officer BOTOX® Allergan, LLC.  
Professor of Neurology, University of California, Irvine**

Dr. Mitchell Brin is a physician neurologist with extensive patient care and clinical development experience with 28 years of pharmacology, experimental therapeutics, small molecule and neurotoxin (including Oculinum® / BOTOX® / Myobloc® / Dysport®) research on a background of extensive patient care. This research & development experience includes 17 years academic experimental therapeutic (drug/biologics/device) and genetic clinical trials with studies supported by competitive U.S. Food and Drug Administration grants and awards, the National Institutes of Health, private philanthropy and 11 years in the biopharmaceutical industry.

Dr. Brin graduated with a Bachelor of Arts degree in Biology from the University of Pennsylvania (Magna Cum Laude, Phi Beta Kappa) and received his Medical Degree from Columbia College of Physicians and Surgeons. He completed a medical internship at the Mount Sinai Medical Center, neurology training at the Columbia University Neurological Institute, followed by a fellowship in Movement Disorders at the Neurological Institute, where he became an Assistant Professor and Coordinator of the Dystonia Clinical Research Center. In 1994, Dr. Brin joined the staff at Mount Sinai School of Medicine, subsequently received the Bachmann-Strauss Endowed Chair in Neurology and was promoted to Professor.

In 2001, Dr. Brin joined Allergan as Vice President of Development, and Therapeutic Area Head for BOTOX® & Neurology. Subsequently promoted to Senior Vice President, he was responsible for the Global Registration Development program for therapeutic and aesthetic biologics and neurology small molecules. In 2007, he assumed the responsibilities of Senior Vice President Global Drug Development, and Chief Scientific Officer for BOTOX®. In this capacity, he provides strategic cross-functional support of the neurotoxin and next generation biologics program. This includes global scientific support and clinical expertise across the continuum of all BOTOX® therapy (cosmetic and therapeutic) product research, development, regulatory, drug safety, safety pharmacology, formulation, medical affairs and corporate strategy. He continues to publish actively and is a Professor of Neurology at the University of California Irvine, where he evaluates and treats patients.



**Joel Calvo**

**Title:** Chairman and Ceo

**Email:** [joelcalvo@gmail.com](mailto:joelcalvo@gmail.com)

Joel Calvo has been a business and community leader for more than 30 years. He is an accomplished senior executive whose strategies, communication skills and financial acumen have consistently delivered a successful track record of growing company profitability and meeting diverse stakeholder interests in small privately---held to large publicly---held organizations.

Professional highlights include the following:

- Chairman/CEO of WM Financial Services, a national broker/dealer with more than 2,000 brokers;
- Chairman/CEO of WM Advisors, a \$28 billion mutual fund complex;
- Partner of ZAAZ, a full service interactive agency: strategy, design, development, user experience, web analytics, optimization, social networking & search marketing;
- President of PNC Capital Markets, a public finance investment banking firm;
- President of PNC Investments, a multi state retail broker/dealer;
- Director of Sales and Marketing for Bank of America's Global Private Bank;
- President of Main Street Trading, an institutional and retail commodities firm;
- Led and integrated numerous business turnarounds, mergers, acquisitions and divestitures;
- Established strategic partnerships and joint ventures to grow product distribution and optimize capacity; and
- Highly effective communicator, keynote speaker and frequent guest commentator on CNBC, Bloomberg, PBS, FOX and CNN.

Community highlights include the following:

- Board of Director, Vancouver Economic Commission (British Columbia, Canada);
- Board of Advisor and Executive Committee, University of California (Irvine)



**Imran Currim**

**Title:** Chancellor's Professor, Marketing, and Associate Dean, Marketing & Student Relations for Executive MBA Programs

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**Personal Website:** <http://web.merage.uci.edu/~currim/>

Imran Currim is Chancellor's Professor at the University of California, Irvine, and serves the Paul Merage School of Business as Associate Dean, Marketing & Student Relations, for the Executive MBA Programs.

Prior to that, he served the Merage School as Associate Dean of the Masters Programs.

Prof' Currim is the recipient of two of the highest honors in marketing:

- the American Marketing Association William O'Dell Award for "the article judged to have made the most significant five year contribution to marketing theory, methodology, and practice," and
- the American Marketing Association/Houghton Mifflin Distinguished Teaching in Marketing Award, "for contributions to teaching excellence."

Professor Currim's recent papers have been finalists for:

- the 2003 American Marketing Association Paul E. Green Award for best paper published in Journal of Marketing Research during 2002.
- the 2004 European Marketing Academy Award for best paper published in International Journal of Research in Marketing during 2003.

Professor Currim received:

- Wall Street Journal's 2008 Favorite Professor in an Executive MBA Program.
- Business Week 2006 ranked his marketing course taught in the Executive MBA Program #3 in the world.

Professor Currim was recently appointed Chancellor's Professor at UCI, a title used to "recognize full Professors who have demonstrated unusual academic merit and whose continued promise for scholarly achievement makes them of exceptional value to the university." He also received one of the highest commendations awarded by the University of California Irvine Academic Senate, the Distinguished Faculty Lectureship Award.

## Research

- How customers make choices
- How competitive product and service features, marketing mix variables such as price, sales promotion, advertising, and distribution, and customer variables such as loyalty, choice set effects, and background variables, influence customer choice.
- Published articles on this topic in various journals such as the European Journal of Operations Research, International Journal of Research in Marketing, Inquiry, Journal of Consumer Research, Journal of Marketing, International Journal of Internet Marketing and Advertising, Journal of Marketing Research, Management Science, Marketing Letters, Marketing Science, and Organizational Behavior and Human Decision Processes. Publications are available at <http://web.merage.uci.edu/~currim/publications.htm>
- Served as Area and Associate Editor of Marketing Science, and Management Science for 13 years.
- Currently serves on the editorial boards of the Journal of Marketing Research, International Journal of Research in Marketing, Journal of Interactive Marketing, International Journal of Electronic Business, and International Journal of Internet Marketing and Advertising.

## Consulting, Executive Training, and Teaching

- Recognized as an international expert in the area of design and marketing of products and services, and market research.
- Consulted for companies such as Altiris, AT&T, Baxter, Dell, Elcam Medical (Israel), Inabata (U.S. and Japan), Johnson and Johnson, Los Angeles Times, Orange County Register, St. Joseph's Hospital, Twentieth Century Fox, Warner Brothers, and smaller profit and not-for-profit organizations.
- Conducted executive training programs at companies such as Astro Asia (Thailand), Bioscience Webster, British Petroleum, Children's Hospital of Orange County (CHOC), Conexant, First Auto Works (China), Fluor-Daniel, Ingram-Micro, Microsemi, Merage Foundation Export Program, Orange County Register, Panasonic Avionics, Shinsegae (Korea), and Triage Consulting.
- Received 17 Excellence in Teaching Awards most of which are for his teaching in the Executive and Fully Employed MBA Programs at UCI, New York University, and UCLA.

## Prior Academic Appointments

Before joining UCI in 1989 he was a member of the business school faculties of UCLA Anderson School of Management, New York University Stern School of Business, and Yale School of Organization and Management.



### **Dr. Ben Drillings**

**Title:** Director, American Israeli Medical Association

**Email:** [drben@a2zhealth.com](mailto:drben@a2zhealth.com)

Dr. Drillings graduated from New York Chiropractic College and studied Physical Education and Exercise Physiology at C.W. Post College in Long Island University. In 1998, Dr. Drillings established two vocational schools for Integrative Medicine and the A2Z Health Wellness Centers in southern California.

Dr. Drillings founded The American Israeli Medical Association (AIMA) which is a networking organization based in Los Angeles. AIMA specializes in bringing together investors, professional firms, executives, medical doctors, and academicians to share ideas, build a greater network between Israel and the United States, and expend their knowledge about the current trends in the biotechnology and medical industry. In addition, he serves as the West Coast delegate for Israel Medical Association – USA Chapter.

Dr. Drillings has been attending regularly international conference related to medical tourism and biotechnology innovations. Dr. Drillings holds conferences related to the health industry and medical innovations twice a year in California.



The American Israeli Medical Association (AIMA) is a networking organization based in Los Angeles. AIMA specializes in bringing together investors, venture capitalists, professional firms, executives, medical doctors, and academicians to share ideas, build a greater network, and expend their knowledge about the current trends in the biotechnology and medical industry.



Thomas Eppel

**Title:** Summer Session Instructor and Assistant Specialist

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**Personal Website:** <http://www.tomeppel.com>

Born and raised in Germany, Dr. Thomas Eppel came to the United States in 1984 and enrolled in the Ph.D. program of the Psychology Department at the University of Southern California.

After receiving his Ph.D. in Mathematical Psychology with an emphasis on decision analysis, Dr. Eppel joined the faculty of the Krannert Graduate School of Management at Purdue University. In 1996 he returned to California to become Vice President of Decision Insights, Inc., a consulting company specializing in decision and risk analysis.

In January 2000, Dr. Eppel joined the staff at the Graduate School of Management at the University of California Irvine as an Assistant Dean, responsible for curriculum development around the "Information Technology for Management" focus. He currently lectures at the Paul Merage School of Business, UC Irvine.

Dr. Eppel has published numerous articles, book chapters and reports in the areas of decision and risk analysis. He has been involved in consulting projects with clients such as the U.S. Department of Energy, the California Department of Health Services, EPRI, SANDIA, the Joint Research Centre (Commission of the European Communities), and others.

In addition, Dr. Eppel designed and taught several executive training seminars. He authored a textbook and developed instructional software in statistics and has been widely recognized for his outstanding teaching.

His teaching awards include the R.B. and Mary Stewart Distinguished Teaching Award from the Krannert School of Management at Purdue University and an award for Innovation in Teaching from the University of California at Irvine, as well as several awards given by students.

In 2000, Business Week's rankings and profiles of MBA programs listed him as one of the two most popular professors at the Graduate School of Management, UC Irvine.





**Michael A. Friedman, M.D.**

**Title:** President and Chief Executive Officer Cancer Center Director

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Michael A. Friedman is president and chief executive officer of City of Hope, a cancer research and treatment institution dedicated to innovation in basic and clinical biomedical research and delivery of compassionate, world-class patient care. Friedman also serves as director of the institution's Comprehensive Cancer Center and holder of the Irell & Manella Cancer Center Director's Distinguished Chair.

Friedman was formerly senior vice president of research and development, medical and public policy, for Pharmacia Corporation. In addition, he served as chief medical officer for biomedical preparedness at the Pharmaceutical Research and Manufacturers of America following the events of September 11, 2001. Friedman had previously served as Food and Drug Administration (FDA) deputy commissioner and was later tapped by the Clinton administration to serve as acting commissioner of the agency. He helped to streamline the FDA's review and approval process and provided oversight of evaluations for drugs, biologics, medical devices and food ingredients.

In 1983, Friedman joined the Division of Cancer Treatment at the National Cancer Institute (NCI), and went on to become the associate director of the division's Cancer Therapy Evaluation Program. Before joining the NCI, Friedman spent nearly a decade at the University of California at San Francisco, serving as associate professor of medicine, and interim director of the Cancer Research Institute. Friedman has received numerous commendations, including the Surgeon General's Medallion in 1999. He received his Bachelor of Arts degree, magna cum laude, from Tulane University and a Doctorate in Medicine from the University of Texas. He completed postdoctoral training at Stanford University and the NCI, and is board certified in internal medicine and medical oncology.



**Gilad Glick**

**Title:** Worldwide Vice President of Sales & Marketing

**Email:** [gglick@its.jj.com](mailto:gglick@its.jj.com)

Gilad's 16 year career in Medical Devices spans across multiple countries in Europe and the US and a variety of functional areas including Sales, Marketing, Service and Research & Development.

Currently, he is the Worldwide Vice President of Sales & Marketing of Biosense Webster overseeing all strategic and commercial activities globally. He also serves on the Management Board for this \$1.1Bn higher-tech medical device business which is one of the fastest growing global subsidiaries within Johnson & Johnson, the largest manufacturer of healthcare products in the world. Gilad joined Biosense, one of the early success stories in

Israeli medical device history, when it was a small startup company and was later acquired by Johnson & Johnson.

Gilad earned a Masters in Business Administration (MBA) from the Maastricht School of Management in the Netherlands, majoring in General and Strategic Management. In addition, he participated in the International Executive Master of Finance and Control (EMFC) program from the University of Amsterdam, The Netherlands. He is also a graduate of the prestigious “Strategic Marketing Management Executive Program” at the Stanford Graduate School of Business.



**Dr. Leonard Lane**

**Title:** Senior Lecturer, Strategy  
Paul Merage School of Business  
University of California, Irvine  
**Email:** [llane@uci.edu](mailto:llane@uci.edu)

Dr. Leonard Lane is a Senior Lecturer, Strategy at the Paul Merage School of Business where he has been teaching Competitive Strategy, Competitive Intelligence, Topics in Strategic Innovation and Global Strategy since 2004. In addition to his teaching duties,

Dr. Lane is the Group Director Leadership Development for Li & Fung; a Hong Kong based International Trading and Supply Chain orchestrator where he is responsible for overall direction and implementation of the Group’s Senior Leadership Development and Succession programs.

Leonard is a seasoned international management consultant and manager with over thirty seven years of consulting and leadership experience with a strong background in supply chain and integrated logistics.

Prior to returning to the United States in 1999 to obtain his doctorate, Leonard ran his own consulting firm, LLA Pacific, Ltd.

In Hong Kong where he worked with Li & Fung, DHL, Hong Kong Bank, V-Tech, Caltex, the Airport Authority and helped with the formation of Hong Kong Logistics Council. Prior to relocating to Hong Kong, Leonard founded and ran LLA Inc. and LLGlobal Consult in Seattle and Alaska where he worked with BP, ARCO, AMOCO, Alaska Airlines, Alaska International Air and Intel.

Leonard has lectured on leadership and global strategy at the University of Chicago MBA program, the Hong Kong University of Science and Technology, and was the lead instructor for “Developing Global Strategy” for Motorola University and Nortel’s Executive Development programs in the Asia Pacific region.

He developed and was the lead instructor for the strategy portion of the Hong Kong Bank’s (now HSBC) Senior Executive Strategy and Managing Global Risk Program.

He has recently advised the Hong Kong Pearl River Delta Foundation, is a Senior Advisor to the Hong Kong Managing World Cities project and advises the Fung Global Institute on Global Supply Chain issues..

Leonard received his Bachelor's degree in Political Science and MBA from the University of Southern California, his Doctorate in Management from Case Western University in 2003, is a former U.S. Marine and a three-time ironman finisher.

**Amir Lerman**

[lerman.amir@mayo.edu](mailto:lerman.amir@mayo.edu)

Amir Lerman is Professor of Medicine, Division of Cardiovascular Diseases and Internal Medicine at the Mayo Clinic, Rochester, Minnesota. He serves as the Director of research of the Cardiac Catheterization Laboratory and is Director of the Chest Pain and Coronary Physiology Clinic, and is a Consultant for the Division of Cardiovascular Diseases, Mayo Graduate School of Medicine.

Dr. Lerman graduated with honors from the Technion, Israel Institute of Technology, School of Medicine, in Haifa, Israel. Dr. Lerman is on the editorial boards of several medical journals. Dr. Lerman's research is funded by the National Institute of Health, American Heart Association, the Department of Defense and medical industry.

He has particularly interested in the detection and treatment of early atherosclerosis, acute coronary syndrome, plaque vulnerability, cardiovascular disease in women coronary physiology and coronary imaging.



**Michal Miasnik,**

West Coast Representative, BIRD Foundation

Ms. Michal Miasnik is the West Coast Representative of the BIRD Foundation. BIRD Foundation ([www.birdf.com](http://www.birdf.com)) was established in 1977 by the U.S. and Israeli governments to develop and fund industrial Research & Development partnerships between companies from both countries on a project specific basis.

Located in the Silicon Valley, Ms. Miasnik is responsible for initiating business matchmaking activities between Israeli and American companies, business development and relationship management with West Coast hi-tech companies, and strategic growth initiatives. Ms. Miasnik has been promoted to this role in 2004 after being an associate at BIRD beginning at 2001. Ms. Miasnik has been a squadron officer in the Israeli Air Force and holds BA degree from Tel-Aviv University.



**Bruce Money , PhD**

**Title:** Department Chair and Fred Meyer Professor of Marketing and International Business

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Dr. Bruce Money is Chair of the Business Management Department and Professor of Marketing and International Business at Brigham Young University's Marriott School of Business. He is an internationally recognized expert in strategic networking and has been a visiting professor at business schools in Austria, Greece, and Singapore.

Dr. Money has also received 7 outstanding teaching awards at undergraduate, MBA, and Executive MBA levels.

Prior to his academic career, Dr. Money worked in the marketing of financial services. Proficient in Japanese, his most recent business position was Vice President in the Los Angeles office of The Sakura Bank, Ltd. (now Sumitomo Mitsui), one of the world's largest banks. There he directed the bank's marketing strategy to Fortune 100 prospects for the Western U.S. and managed a corporate loan portfolio of \$200 million.

Dr. Money also served as partner in a consultancy to William E. Simon, former U.S. Secretary of the Treasury, for whom he initiated a Japanese investment program. Dr. Money also directed \$1 billion in Japanese debt and equity relationships for The Koll Company (now CB Richard Ellis), the West Coast's largest real estate developer.

He has taught in over 50 executive education programs, for the University of Southern California, National University of Singapore, and the University of South Carolina, among others. He has acted as Training Consultant for Bayer Pharmaceuticals, CSX World Terminals, Blue Cross Blue Shield, Fuji Film, Nissan, Robert Bosch Corporation, and Sonoco.

He holds an undergraduate degree from Brigham Young University, an MBA from the Harvard Business School, and a PhD from the Paul Merage School of Business at University California Irvine, where his dissertation subject was strategic networking and national culture.



**Michael A. Mussallem**, age 58. Mr. Mussallem has been Chairman of the Board and Chief Executive Officer of the **Edwards Lifesciences** since 2000. Prior to 2000, he held a variety of positions with increasing responsibility in engineering, product development and senior management at Baxter International Inc., including Group Vice President of its Cardio-vascular business from 1994 to 2000, and Group Vice President of its Biopharmaceutical business from 1998 to 2000. Mr. Mussallem received his Bachelor of Science degree in Chemical Engineering from the Rose-Hulman Institute of Technology and was conferred an honorary Doctorate by his alma mater in

1999. He was a director of Advanced Medical Optics, Inc., from 2002 to 2009, where he chaired the Organization, Compensation and Corporate Governance committee, and World Heart Corporation from 2000 to 2003. Mr. Mussallem is a director of the OCTANe Foundation for Innovation, is a director and former chairman of the California Healthcare Institute, and was chairman of the Advanced Medical Technology Association (“AdvaMed”) from 2008 through 2010.



**Stanton J. Rowe**

**Title:** Vice President, Advanced Technology and Chief Scientific Officer

**Email:** [stanton\\_rowe@Edwards.com](mailto:stanton_rowe@Edwards.com)

Corporate Vice President, Advanced Technology and Chief Scientific Officer Edwards Lifesciences Corporation. Stanton J. Rowe is Corporate Vice President, Advanced Technology & Chief Scientific Officer at Edwards Lifesciences Corporation. He previously served as president and CEO of Percutaneous Valve Technology Inc., which was acquired by Edwards in January 2004. Prior to PVT, which he helped to found in 1999, Rowe was corporate vice president of Business Development and Strategic Planning for Datascope Corp. Prior to this, he was vice president of Business Development for Johnson & Johnson’s Interventional Systems Division (JJIS), responsible for the company’s coronary stent development efforts. At JJIS and the related Cordis Corporation, Rowe held a variety of positions with increasing levels of responsibility, including heading the company’s Business Development, Advanced Technology, Worldwide Clinical Research, and Marketing groups. Rowe joined Cordis after having held several positions in product management for various medical device companies. He holds a bachelor’s degree from the University of Alabama. He also sits on the board of directors of both ePacing and Biomerix Corporation.



**Bill Somers**

**Title:** Chief Financial Officer for Design2Matter

**Email:** [wsomers@aol.com](mailto:wsomers@aol.com)

Bill Somers is the Chief Financial Officer for Design2Matter ([www.design2matter.com](http://www.design2matter.com)), a leading design engineering consultancy in Silicon Valley. Bill also serves as Treasurer of the Jean Weingarten Oral School for the Deaf, an internationally recognized center of excellence for providing oral language education for young deaf children. Prior to joining Design2Matter in 2009, Bill was CFO and COO of PRTM Management Consultants an international management consulting firm with 700+ consultants working out of 17 offices around the world.

He started as a management consultant at PRTM in 1989, becoming a Partner and co-leader of the Semiconductor Industry Practice in 1995. In 2003, Bill became CFO and COO and helped drive the firm's revenue growth 2X and profit growth 6X over the next four years. Prior to joining PRTM, Bill held a variety of finance, program management and operations positions at General Motors and National Semiconductor. He holds an MBA (with Distinction) from the University of Michigan's Ross School of Business and a BS in Mechanical Engineering from Kettering University.



**Sasha Strauss**

**Title: Managing Director Innovation Protocol Strategic Brand Development**

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Clients, agencies, media and academic institutions call upon Sasha Strauss' award-winning forums worldwide; from Romania to China, Switzerland to Mexico. Media channels like National Public Radio (NPR), Forbes and The Wall Street Journal seek his expertise on branding everything from presidential candidates to innovative start-ups and Fortune 500s.

He has keynoted with notable speakers such as Magic Johnson, Tony Hsieh, Frank Gehry, Biz Stone and Simon Sinek.

With over 17 years in strategic brand development, Mr. Strauss has built brands at the world's leading advertising, PR, marketing and branding agencies.

In 2006, Mr. Strauss founded Innovation Protocol, a brand strategy consulting firm that exclusively serves innovators. As the Managing Director, Mr. Strauss leads a team of 30 strategy consultants that serve clients such as Warner Bros, Johnson & Johnson, Korn/Ferry International, ADP, Evite and PayPal. Innovation Protocol also allocates 10% of the company's brand development services to non-profits, with millions of dollars in philanthropic work being delivered since the firm's founding.

When not supporting Innovation Protocol's international clientele, Mr. Strauss teaches graduate brand strategy at USC's Marshall School of Business and Annenberg School for Communication. After only five years of teaching, both courses have a year waiting list and remain the most impacted courses in both programs.

On the other side of town at UCLA's Anderson School of Management, Mr. Strauss is an Executive in Residence, coaching EMBA's in corporate and professional brand development. Via these professorial roles, Mr. Strauss also teaches at preeminent graduate programs such as MIT Sloan and The Johnson School at Cornell.

Mr. Strauss holds a bachelors degree from UC Irvine, a masters in strategic corporate communication management from USC and an executive business management degree from UCLA's Anderson Graduate School of Management.

Mr. Strauss is a certified Toastmaster, an Entrepreneur's Organization leader, a Big Brother (mentor), an Eagle Scout and a swooning husband.

## Participants

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### Assaf Shechter

Assaf Shechter, (35) married, PhD in molecular biology from Ben Gurion University. A member of the R&D staff of Amorphical since the inception in January 2004.

Amorphical is a pioneering marine biotech company that harnesses unique bio-minerals used by crayfish for the treatment and prevention of human metabolic bone disorders. Assaf was involved in most of the major scientific findings related to the venture and served as the CEO of the company since 2007 and until recently. He is currently engaged in the establishment of a new marine biotech venture together with the scientific founders of Amorphical.

In 2008, together with Jonathan Gross, founded the BioExecutive Forum, a non-profit organization created by and for executives from the Israeli Biomed industry. This forum was set up to facilitate exchange of knowledge and comprises nearly 700 members today.



### Nimrod Bin-Nun

Strategy & Special Projects director

Nimrod Bin-Nun is Strategy & Special Projects director at BioLight, a publicly listed holding company, engaged, through its subsidiaries, in development and commercialization of both pharmaceuticals and medical products and devices.



BiOLight's unique investment strategy includes the forming of clusters of companies focusing on specific therapeutic areas, thus enabling knowledge synergies and enhancing innovation and success at both the R&D and the commercialization stages.

Previously, Nimrod worked at Teva Pharmaceuticals for 5 years in both finance and business development, mostly focusing on the Asian markets. His last position was Business Development Manager for the Asia & Pacific region.

Nimrod holds a dual-BA/B.Sc. in Economics and Biology and an MBA in Finance and Marketing, both from Tel Aviv University. Nimrod lives in Tel-Aviv with his wife and baby daughter.



**Noam Dangur**

Business Information Specialist at IEICI (The Israel Export and International Cooperation Institute)

I have an experience of more than 12 years in retrieving business & competitive information in varied industries: consumer goods, Medical devices & Hi Tech & Technology.

I am an expert in web searching and have a perfect knowledge of various information sources and databases. For the last 9 years I am working as an "information specialist" in the 'information division' at the "Israeli Export and International Cooperation Institute" (IEICI). IEICI is a non-profit organization supported by the government of Israel and the private sector in order to promote the integration of Israeli companies into the global market.

Our information center assists Israeli Exporters who need further information and intelligence in order to successfully export abroad. We have an access to 15-20 online professional databases in a various areas.

In my daily routine, I am responsible on handling queries and requests from Israeli exporters, who need business information such as: potential customers (distributors, wholesale, agents, integrators etc...) Credit & finance Information regarding companies, market reports regarding specific markets, statistics & trade data (import-export), forecast regarding technologies and conducting tailored made research for specific needs. In addition, I am responsible for internal requests & queries from the Business Development Managers at IEICI focusing on new trends & data in order to support the yearly planned activities for the Israeli exporters. I am Holding B.A in 'Information Science' and a B.A in 'Musicology' from Bar Ilan University.



**Haim Gil-Ad**

Founder and CEO



Prior to founding NovellusDx, Mr. Gil-Ad was the CEO of Supreme Architecture Ltd. Which developed a unique Technology enabling State of the art LED based Free Space Optics (FSO) communication.

Prior that Mr. Gil-Ad served as CEO of Optigo Systems Ltd., a vertically integrated leading company in the field of electro-optics, till its Merger into IAI-ELTA. Mr. Gil-Ad pursued an extensive career with the Israeli Ministry of Defense (IMOD) as head of some major international R&D and full-scale development programs.

Mr. Gil-Ad earned a B.Sc. in Engineering from Tel-Aviv University and an MBA from Ben-Gurion University. He has twice been awarded the Israel National Quality Award.



**Ms. Yael Ravia-zadok**

Head of Bureau for Middle East Economic Affairs at the MFA

Since 2008, Yael serves as a Head of Bureau for Middle East Economic Affairs at the MFA. In this capacity she is involved with the advancement of Israel economic relation with Middle East countries.

She is also in charge of the advancement of the economic and civil relations with the PA as she deals with the Israeli economic policy vis-à-vis Judea

Samaria and Gaza strip. She is also a member of the Consulting Committee to the Authority for the Advancement of Status of Women in the Prime Minister's Office.

Yael Joined the Israeli Foreign Ministry as a cadet in 1988. Served as a consul in Sao-Paulo, Brasil (1992-1996) where she was chosen by the MFA as an "Outstanding Diplomat of the year 1995". Served as Consul General to the Southwest of the US, in Houston Texas (2002-2005), where the consulate under her command was chosen by the MFA to be honored as the "Outstanding Team of the year 2003".

She was elected as chairwoman of the syndicate of the Israeli diplomats and served 4 years as a syndicate member. She was in charge of Women Status at the MFA (2006-2009)

Yael Holds MA degree Com Laude from Hebrew University in Geography and Urban Studies and a BA degree from Hebrew University in Geography Sociology and Anthropology.



**Zohar Duchin**

Co-Founder and CEO BodiByo

Zohar Duchin is a co-founder and CEO of BodiByo - a startup providing a unique mobile health solution. Zohar has over 9 years of

experience as a high tech executive utilizing complex multi-disciplinary technologies.

Prior to co-founding BodiByo, Zohar was the Global Product Marketing Manager at Applied Materials Israel, Wafer Inspection Division, a company providing wafer inspection solutions to the semiconductors industry. Formerly, Zohar was an applications development group manager at Applied Materials responsible for defining and designing innovative inspection solutions.

Zohar holds a B.Sc. (cum laude) in Physics, B.Sc. (cum laude) in Computer Science from Tel Aviv University and MBA (cum laude) from the Technion, Israel Institute of Technology.



**Nadav Yellin**

ValCare

Completing BSc. degrees in Biomedical and Mechanical Engineering in Ben Gurion University, Both Magna Cum Laude, Nadav acquired a wide theoretical background. The combination of biomedical studies and classic engineering knowledge allows Nadav an end to end approach.

Already in the university the spirit of an entrepreneur was showing it's signals and Nadav participated in a bio-medical competition held by Niot incubatory. An idea for a unique needle for infants that allows the physician to puncture the vein/ artery much easily without rupturing the blood vessel due to repetitive unsuccessful attempts took the third place.

Practicing his first years after graduation in the Israeli Air Industry, Nadav gathered experience in the different fields of mechanical engineering. The medical bug stayed in his heart and pushed him back to the medical device industry. The next couple of years Nadav spent leading a team developing a novel transcatheter valve for the mitral position in Medtronic Ventor.

Leading the design, participating in preclinical trials, consulting world leader physicians Nadav was a pivot point in the team responsible for a Novel device.

Currently, Nadav Joins a new American Israeli Venture which will be located in Irvine, CA. The new venture will develop products for structural heart. After achieving a certain point in the development process Nadav will be part of the core team of the Venture that is responsible for bringing the new technology to Israel for completion of the R&D stage and take it into clinical trials.



**Yochai Parchak**

Director of R&D

Yochai holds the position of Director of R&D in the Haifa Technology Center of Biosense Webster in Israel for five years. Prior to this position, Yochai held a few other roles in the Biosense Webster R&D organization, with more than nine years in the company.

Biosense Webster is a Johnson and Johnson Company, specializing in diagnosis and treatment of cardiac arrhythmias (abnormal electrical activity in the heart). Prior to Biosense Webster, Yochai worked six years at ADC Teledata as System Engineering and Hardware Group Manager in the R&D organization and was responsible for the design of their next-generation platform.

ADC Teledata operates in the telecommunication market with more than 20 years in various positions, Yochai's experience also includes working in other companies as a design engineer. Yochai hold a B.Sc. in Electrical Engineering from Ben-Gurion University (1992) and MBA from the Technion – Israel Institute of Technology (2001).



**David Daily**

CEO and co-founder

David Daily is the CEO and co-founder of DALI Medical Devices ([www.dalimed.com](http://www.dalimed.com)), a R&D company focused on developing innovative drug delivery devices.

Some of these innovative drug delivery devices are being developed in partnership with Elcam Medical ([www.elcam-medical.com](http://www.elcam-medical.com)), a world-class manufacturer of precision injection-molded disposable medical devices, with production facilities in the USA, EU and Israel.

Before co-founding DALI in 2003, Daily worked as Product Development Manager at Élan Medical Technologies (EMT, a subsidiary of Élan Corporation, Ireland), where he was responsible for leading the development of a variety of disposable automatic injection and micro-infusion systems from initial prototypes until registration.

Daily is a co-inventor on 15 international patents and patent applications. He received a M.Sc. degree in Biomedical Engineering and a B.Sc. degree in Mechanical Engineering from the Technion (Israel Institute of Technology, Haifa), and a Master's degree in Business Administration (MBA) from the Hebrew University of Jerusalem (honors).



**Amir Dagan**

CEO Enopace Biomedical Ltd.

Amir Dagan is the CEO of Enopace Biomedical Ltd. The company is developing an implantable device to treat heart failure patients. Prior to co-founding Enopace in 2008, Amir was an investment manager in Evergreen Venture Partners, one of the largest VCs in Israel.

In Evergreen he worked with Medical Devices companies and serial entrepreneurs in the life science industry. Prior to this Amir served in senior R&D and product management executive roles in the telecom and software industries.

Amir holds a B.Sc. in Software engineering and management, specializing in information system analysis, from Tel Aviv, and has a M.Sc. in Biomedical Engineering, from Ben-Gurion University with a thesis in Cardiac Electrophysiology. Amir is married with 4 kids and lives in Kibutz Megiddo.



**Itai Pelled**

R&D Edwards Lifesciences

Dr. Itai Pelled spent his entire career in the medical device R&D arena. His current position is managing of the pilot lab unit for Edwards Lifesciences (Israel) and developing the company capabilities for clinical built.

In parallel, he is leading the development of polymers components of the Israeli branch projects. Prior to his last position, Dr. Pelled relocated to Irvine CA for three years and worked as polymer specialist consultant for Edwards Lifesciences headquarter in Irvine.

As part of his position, he was involved in the development of the next generation of heart valves, delivery systems and balloon catheters. Prior to his position in Edwards Lifesciences, Dr. Pelled was one of the first employees in Percutaneous Heart Valve Technologies (PVT), a startup company that developed the first transcatheter heart valve for aortic valve replacement and was leading the non-metallic components development.

Dr. Pelled served in the Israel Defense Forces (IDF) for five years in the Engineering corps and the Intelligence corps and he is holding a Major rank. Dr. Pelled is married to Limor and they are raising three adorable kids.

Dr. Pelled holds a Ph.D. in Applied Chemistry from the Hebrew University in Jerusalem, an MS.c in Bio-Medical Engineering and a BS.c in Chemistry, both from Tel-Aviv University.



**Yonat Granot,**

COO, ETView.

ETView presents a major advance in continuous visualization of the airways during thoracic surgical procedures. Yonat has more than 20 years of management experience. Prior to joining ETView, Ms Granot served as COO for the Misgav Venture Accelerator, a high-tech life sciences incubator located in Northern Israel.

Previously, Ms Granot held the position of Operations Manager for ACS Motion Control, a sensor and motion control company; Operations and Marketing Manager for Arad Technologies; and assistant to the VP of R&D at Tambour, where she managed the engineering production department. Ms Granot served as CEO of Genova, an incubator company in the renewable energy sector. Between 2009 and 2010 she served as the COO of FlowSense, a publicly traded company. Ms. Granot holds an MSc and BSc in industrial engineering from The Technion-Israel Institute of Technology.



**Dr. Yehuda Sharf**, Ph.D., MBA  
Founder and CEO, Cardiogal Ltd

Dr. Sharf is the founder and CEO of Cardiogal Ltd. The Company, founded in 2007, is developing innovative non-invasive cardiac monitoring systems. Cardiogal's unique solution can be used in many clinical settings where heart monitoring is warranted, however it is primarily targeted for critically ill patients in ICU and around the time of surgery.

Prior to founding Cardiogal, Dr. Sharf served as the Vice President of R&D and CTO of Barnev Ltd., a provider of innovative ultrasound technology-based labor progression monitoring device. Dr. Sharf holds a Ph.D. in Physics and an MBA degree from Tel Aviv University. He completed his post doctorate studies at Harvard Medical School and at MIT, Cambridge, MA.

Dr. Sharf specializes in the theory and applications of ultrasound, NMR and MRI. He is the author of 18 peer reviewed articles and 8 patents.



**Ran Feuer**,  
Director of Sales TEVA pharmaceuticals

Ran Feuer is the Director of Sales Excellence at TEVA pharmaceuticals with responsibility for Field Force Effectiveness and Strategy, Customer Relationship Management & Business Intelligence systems and Sales Managers competencies development.

He also served as the EMIA integration and post M&A officer where he led the process of merging the acquired Ratiopharm enterprise into the TEVA EMIA (Eastern Europe, Middle East, Israel and Africa) Region.

Prior to joining TEVA Ran Feuer worked in TNUVA as the Operations and Quality manager responsible for process improvement in the Israeli southern Logistic center. He has an MBA in International Management and Strategy and BSc in Industrial Engineering, both from the Ben-Gurion University.

In his third year of college at Ben-Gurion University, he started to work full time as an Industrial Engineer in TNUVA during which he found the time to volunteer in the Israeli cancer association. Ran has a background as a paramedic in the Israel Defense Force and 8 years of community service in the Israeli Red Cross. He was born on June 3rd, 1976 married and has 2 beautiful young daughters.



**Boaz Brill**

CEO at GluSense

Since Sept 2011, Lod, Israel, a company developing an implantable continuous glucose sensor. Prior he served as VP R&D and CTO at Nova Measuring Instruments, Rehovot, Israel, managing all R&D activities in the company (~70 employees) responsible for the strategic technological directions of the company, manage IP portfolio. Before that he served in different management positions at Nova Measuring Instruments, covering project and product management aspects.

Lead the development of Nova's Optical CD technology (3D measurements for Semiconductor process control) from concept to becoming the company's main product, driving sales of >\$100M in 2010/11.

Boaz holds an MBA – University of Bradford, UK (Israeli branch); Ph.D. in Physics – Weizmann Institute of Science; M.Sc. in Physics - Weizmann Institute of Science and B.Sc. in Physics and Mathematics – Hebrew University of Jerusalem (Talpiot Program)

**Publications: Papers:** about 12 scientific publications **Patents:** over 40 US patents and patent applications, mostly related to Optical CD

**Personal:** Married + 3 kids

Hobbies: classical music, photography, mountain bike



**Izhak Fabien**

CTO

diligence with strategic partner that led to an M&A agreement. Earlier in his career, Mr. Fabian worked for four years with RAFAEL Advanced Defense Systems, where he directed an incubator group that matured several multidisciplinary systems. The systems combine state of the art hardware, software, algorithms and electro optic technologies. Mr. Fabian earned his bachelor's and master's degrees in biophysics in Bar-Ilan University.





**Oz Vachtenberg**

Founder VP RnD DenTack Implant

Oz brings many years of innovation in medical devices, especially dental and orthopedic implants. In 2006 Oz founded “DenTack Implant”, a company that develops and manufactures innovative dental implants for patients with insufficient bone volume eliminating the needs for additional surgical bone augmentation procedures.

Till 2009 Oz served as the CEO of the Company. From 2009 he is the VP RnD. During 2011 the company has started marketing its innovative dental implant with great success in several European territories and Israel. Today most of the efforts are focused on expanding its global presence as well as product portfolio.

Prior to Dentack, Oz worked as an RnD engineer at Disc-O-Tech Medical Technologies, developed mainly implants for orthopedic surgeries. Between 1992 to 2002, Oz worked as a product manager at the mechanical department of Scan Master System, a manufacturer of nondestructive inspection systems for a wide range of industrial applications, using ultrasonic (UT) and eddy current (EC) technologies

Oz holds three patent applications in the fields of medical implants and one in the industry of Non Destructive Tests.



**Ilana Fishman,**

Founder and CEO

Endpoint, full service premium contract research organization (CRO) located in Raanana, Israel.

Endpoint specializes in performing clinical development activities for pharmaceutical and medical device companies.

Ilana has MSc in Chemical Engineering and BSc in Mechanical Engineering.

She is a Senior CRA with 20 years of experience in conducting clinical studies in Israel and abroad. Prior to Endpoint, Ilana worked at Elan Medical Systems, Eli Lilly and PPD.

Ilana founded Endpoint in 2005 and expanded it from a one person company to a boutique CRO, with XX employees, providing quality clinical development support in a wide array of therapeutic areas from study start-up to close-out and everything in between.

Among Endpoint clients are global companies such as Pfizer, Novartis, J&J, Given Imaging as well as local companies such as Micromedic, NiTi, and Regenera.

Ilana is trilingual, a certified skipper, a mother of 3, and an avid traveler. Her motto is: "Find a job you love and you will never work a day in your life" (Confucius).



## Guest Speakers and Hosts

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### Eyal Aronoff

[eyal@aronoffgroup.com](mailto:eyal@aronoffgroup.com)

Eyal Aronoff is a serial entrepreneur and co-founder of Quest Software, one of the largest independent software vendors in the world (Nasdaq:[QSFT](#)).

Eyal's current focus is energy and philanthropy. He is a major contributor of funds and strategy to the effort to decrease the world's dependence on oil. Recently Eyal co-founded the **Fuel Freedom Foundation** which promotes a blueprint for solving the oil price crisis by removing barriers to fuel competition via a grass root effort. At the **Fuel Freedom Foundation** we are creating the gathering place for those individuals who are frustrated with the inability of Washington to deal with our oil addiction and want to do something about it.

[www.FuelFreedom.Org](http://www.FuelFreedom.Org)

Eyal graduated Summa Cum Laude in Chemistry and Computer Science from Bar Ilan University in Israel and now lives in lovely Newport Beach CA.

### Mark and Dana Susson

[danasusson@cox.net](mailto:danasusson@cox.net)

Mark was born in Philadelphia, Pennsylvania. He moved to southern California with his parents in 1968. He received his Bachelor's Degree from the University of California at Irvine (UCI) in Economics in 1976. Thereafter, he attended law school at Loyola Law School in Los Angeles, CA, receiving his Juris Doctorate in 1979. The Sussons have lived in Irvine or Newport Beach since that time, and Mark has maintained a law practice in the field of personal injury. His law firm, Smith & Susson, LLP, is located in Newport Beach.

Dana was born in Orange County, California. She also obtained her Bachelor's Degree at UCI in English Literature in 1976. Mark and Dana met their senior year of college at UCI. Dana also received her Juris Doctorate from Loyola Law School in 1979. Mark and Dana married in May 1979, a few days after completing their last law school finals. Dana practiced for twenty (20) years in the field of medical malpractice defense, and presently sits as a defense arbitrator in binding medical malpractice Arbitrations.

Mark and Dana have two adult children: Matthew, age 26, a graduate of UCLA; and Sarah, age 24, a graduate of University of California, Santa Barbara.

Mark and Dana are active in Jewish community activities and philanthropy. They both serve on the Board of Directors of the JCC; Dana serves on the Board of Directors of Women's Philanthropy, Jewish Federation of Orange County, and was in charge of Food for the Maccabi Games held in August 2007. Both Mark and Dana serve on numerous committees which serve the Jewish community in Orange County.

## **Nancy and Irving Chase**

Nancy & Irving Chase are very involved in the Orange County Jewish community. They are co-chairs of the Board of Visitors of Chapman University's Rogers Center for Holocaust Education. Irv also serves as a trustee at Chapman University, Chairman of the Board of the Merage Jewish Community Center, JCC Maccabi Games co-chair, and past National President and Foundation President of the Zeta Beta Tau National Fraternity.

He is an attorney who manages a real estate investment and management company. Ryan, their son, is the fourth generation of their family business that was founded in Orange County in 1919. They also have a daughter Catie who is the interim Women's Athletic Director and Varsity soccer coach at Sage Hill High School and a new daughter-in-law, Brooke, a fitness instructor at the Merage JCC.

Nancy serves on the board of the Merage Jewish Community Center and Women's Philanthropy of the Jewish Federation, Jewish Family Services advisory council, the Bureau of Jewish Education's Young Philanthropists, and is actively involved with Families Forward, an organization helping homeless families. She is a retired elementary school teacher.

## **Katherine Merage**

Katherine Merage is a leader in the Jewish community of Los Angeles and Orange County. Indeed, she has been a leader in every community she has ever lived in. Born in Iran, Ms Merage is a noted philanthropist and visionary with respect to the health and well being of the Jewish Community in Israel and the U.S.

Her leadership and financial support has helped sustain the quality and related reputation of Hadassah Hospital in Jerusalem Katherine's generosity contributed to the development of the University Synagogue in Orange County and the Jewish Community Center in Orange County. Both facilities are named after her and her late husband Andre . Katherine is committed to the growth and development of the Negev in Israel as a welcoming place of opportunity for the Jewish people.

## **Lilly Merage**

Lilly Merage is an immigrant from Iran. She was, as Paul says, his "partner" in the development of Chef America. Lilly has been and continues to be involved in and a supporter of the arts. She is a leader in the development of the innovative Artists in Residence program, joining the Merage Foundations to Chapman University Film School and the Orange County High School of the Arts. During the summer, fifteen high school students, many of them from low-income and immigrant families, spend two weeks at Chapman College learning filmmaking.

## **Paul Merage**

Paul Merage is the Founder and Chairman of the Merage Institute. Paul has over 35 years of experience in consumer products. Following 10 years of management experience with major packaged food companies, Paul founded ChefAmerica, a start up frozen food company in 1975 along with his brother David. In time ChefAmerica became one of the largest and most profitable privately held food companies in the US. It is best known for Hot Pockets and Lean Pockets. ChefAmerica operated nationally with a workforce of over 2000. ChefAmerica was sold to Nestle in 2002 for \$2.6 billion.

He is now actively engaged in providing vision and strategic direction for the MIG CAPITAL and its affiliate companies. MIG CAPITAL and its affiliates were a natural progression of the need for a platform to carefully and professionally manage, preserve and enhance the family capital.

Paul is also highly focused on a mission to "give back to America." Paul and his family created The Merage Institute. The Institute's programs are all aimed at improving quality of life through education. Each has gained positive national and indeed, International attention. He is active with the University of California Irvine's Paul Merage School of Business as the Chair of the Executive Committee of the Dean's advisory board. In addition Paul and the Merage family support a number of other philanthropic efforts. Paul received a B.S. in Economics and a MBA from the University of California.

**Ralph Stern**

[ralph@stern18.com](mailto:ralph@stern18.com)

Ralph Stern (BA University of Neuchatel, Switzerland; MBA Stanford University) held management positions with FMC and Eldon Industries prior to becoming the major stockholder and CEO of two dental manufacturing companies: Denar and Steri-Oss. These companies were market leaders in dental implants, dental tomographic machines, and TMJ products. In 1993, Steri-Oss was acquired by Bausch & Lomb; in 1994, Denar's major product lines were acquired by Teledyne and Orion-Soredex, the largest health care company in Finland. In 1987 Mr. Stern founded Care Credit, the largest consumer finance company serving the specialty health care markets of dentistry, veterinary medicine, ophthalmology, audiology and cosmetic surgery. He served as CEO of the company until it was sold in 2002 to GE; he now has a consulting position with GE. In 2006 he acquired a TV retailer, known as the king of big screen televisions. His outside activities include the graduate organizations of the Young Presidents' Organization, several local charitable organizations and golf.

**Sue Stern**

Sue Stern moved to Los Angeles, California after graduating from the University of Wisconsin. She became involved in an orphanage, an experience that was the catalyst for wanting to work and support youth-in-need programs. After moving to Orange County, she became involved with Children's Home Society and served as President of the Santa Ana Auxiliary. After raising her children she took a keen interest in theater, serving on committees of South Coast Repertory. She also is on the Board of Girls Inc.

**Carol and Marc Richmond**

Carol and Marc Richmond are originally from Philadelphia and have lived in southern California for over 40 years. Carol holds a MS Ed in Special Education and a State of California Life Teaching Credential. She has consulted with and taught physicians about the business of medicine for the last 20 years. She is now returning to her first love, teaching children with learning disabilities and emotional behavioral issues in a private Educational Therapy practice in Irvine.

Marc Richmond, MD, MMM is the Regional Medical Director for Blue Shield of California. Marc's responsibilities include all aspects of medical management. He also works closely with the sales and marketing and network management departments to promote disease management and wellness programs for Blue Shield's members. Marc graduated from the University of Pennsylvania and Temple University Medical School. He also spent two years in the US Navy, prior to opening the first Board certified Family Practice in Irvine, CA where he practiced for 22 years. Marc received his MMM (Masters in Medical Management) degree from Tulane University in New Orleans. Marc serves on the volunteer faculty of UCI where he teaches a class for Family Practice residents called "From Residency to Reality." He has spoken to local and national organizations about the pros and cons of the current U.S. Healthcare System.

## **Rabbi Arnold Rachlis**

Rabbi Rachlis is the spiritual leader of University Synagogue in Irvine, California. Born in Philadelphia, Rabbi Rachlis received a B.A. from the University of Pennsylvania, and M.A. from Temple University and ordination and a Doctor of Divinity degree (honoris causa) from the Reconstructionist Rabbinical College.

Rabbi Rachlis has taught at Temple University and Spertus College, and has published scholarly articles, opinion pieces and poetry in a variety of publications, including *Judaism, Reconstructionist, National Jewish Monthly, Chicago Tribune, Chicago Sun-Times, Los Angeles Times, Orange County Register, Jewish Journal, Maj'shavot Pensamientos* and *A Psychology – Judaism Reader*.

Rabbi Rachlis has served in Washington, D.C. as a White House Fellow and as a Senior Foreign Affairs advisor in the State Department. He was appointed a regional panelist for the President's Commission on White House Fellowships in both Democratic and Republican administrations, and was also selected as a Fellow in Leadership Greater Chicago.

The former rabbi of the Jewish Reconstructionist Congregation in Evanston, Illinois, Rabbi Rachlis was the youngest rabbi ever elected president of the Chicago Board of Rabbis. His service to the community includes the boards or advisory boards of Jewish Fund for Justice, U.S. Inter-religious Committee for Peace in the Middle East, Americans for Peace Now, China Judaic Studies Association of Nanjing University, University of Illinois Fund for Gerontology Research, National B'nai Brith Hillel Commission, the American Jewish Committee, New Israel Fund, Orange Coast Interfaith Shelter and the Reconstructionist Rabbinical Association, of which he is a past president.

He has also served on the executive committee of the Southern California Board of Rabbis and as a member of the Orange County Board of Rabbis. Rabbi Rachlis has served on the board of Mazon, A Jewish Response to Hunger, for over 16 years and is now its Chair.

For nine years, Rabbi Rachlis hosted *Of Cabbages and Kings* on ABC-TV, as well as a syndicated cable television show on contemporary Jewish issues, *Hayom*. He has appeared as a guest on *National Public Radio, CBS, CNN and PBS*, and has been interviewed frequently by such publications as the *New York Times, Newsweek* and *Time*. He was profiled in the award-winning documentary film, *The Legacy*, and has served as a Judaica consultant for *Compton's Encyclopedia*.

## **Michael L. Meyer**

Mike is a real estate investor and CEO of Michael L. Meyer Company. He retired in 1998 as Managing Partner of the E & Y Kenneth Leventhal Real Estate Group of Ernst & Young LLP (EYKL) Orange County Office. He has been active in the Southern California and national real estate industry for over 40 years. Together with partners, Mike has invested in an enormous variety of real estate projects, as well as private entities and in funds investing in mortgage-backed securities, mezzanine loans, high yield debt, venture capital and controlling interest in businesses. He has received numerous awards for outstanding achievements in the real estate industry and the community, including the California Building Industry Foundation Hall of Fame; the Chapman University Distinguished Research Award, and the University of California Irvine Business School Real Estate Program Lifetime Achievement Award. He serves on a large number of boards in Orange County, including those of City National Bank, Paladin Realty Income Properties, Inc., and the South Coast Repertory Theatre. He is currently an Executive Advisory Board Member of the UCI Paul Merage Business School Real Estate Program; a member of the UCI Chief Executive Roundtable; and President of the Board of the Wellness Community – Orange County. Mike is a native of Omaha, Nebraska and a graduate of the University of Iowa.

## **Nancy Meyer**

Nancy is a founding partner and creative director of Buttoned Up Inc, an organizational product company. She also is a partner and designer with Historic Restorations, a company which buys, restores, and then resells single family residences. Nancy serves on several non-profit boards including the UCI Susan Samueli Center for Integrated Medicine and the Laguna Dance Festival. She is also a member of United Way's Women's Philanthropy Fund. She is the mother to four children ranging in ages from 37 down to 17 and proud grandma to three grandsons.

## **Staff**

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