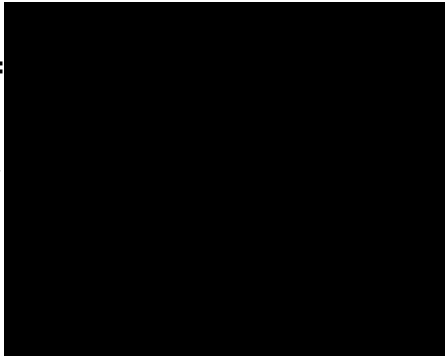


**Committee on Energy and Commerce**  
**U.S. House of Representatives**  
Witness Disclosure Requirement - "Truth in Testimony"  
Required by House Rule XI, Clause 2(g)(5)

<b>1. Your Name:</b> Alan E. Morrision		
<b>2. Your Title:</b> Vice President & Diagnostic Testing Committee Chair		
<b>3. The Entity(ies) You are Representing:</b> National Association for the Support of Long Term Care		
<b>4. Are you testifying on behalf of the Federal, or a State or local government entity?</b>	<b>Yes</b>	<b>No</b>
		X
<b>5. Please list any Federal grants or contracts, or contracts or payments originating with a foreign government, that you or the entity(ies) you represent have received on or after January 1, 2015. Only grants, contracts, or payments related to the subject matter of the hearing must be listed.</b>		
None		
<b>6. Please attach your curriculum vitae to your completed disclosure form.</b>		

Signature: \_\_\_\_\_



Date: 7/17/2017

# ALAN E. MORRISON

## CAREER SUMMARY

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Accomplished results-driven senior executive, investor and nationally recognized health care expert with over 40 years of progressive and diverse experience with a wide range of size and types of health care industry organizations. Specialize in evaluating complex situations within a variety of healthcare sectors and conceptualizing innovative solutions that emphasize a multi-disciplinary approach and incorporate leading-edge policy trends, financial issues, technology and patient care developments. Possess diverse financial, strategic, regulatory, and management experience within healthcare including post-acute care, ancillary services, acute care, outpatient services, healthcare technology, and large medical group sectors. Spent the past 15 years focusing on delivery of ancillary services and other clinical support to post-acute care patients and facilities. Skilled in developing strategies to drive growth and increase efficiencies and profitability. Excellent communicator known for effectively leading staff and providing strategic vision.

- As senior executive, provided senior leadership on health care industry trends, strategic direction, and key financial issues including service line development to meet health care industry changes, company market positioning, regulatory compliance, payment issues and mergers/acquisitions.
- As a consultant and financial advisor, advised 800+ private sector and governmental clients across US and internationally on broad range of issues.
- Consulting and advisory clients included: numerous hospital systems, medical schools and faculty practice plans, large medical groups and clinics, outpatient services companies, lenders to the health care industry, government agencies, medical device companies, and pharmaceutical manufacturers.
- Appointed as VP of international health care technology consulting, publishing, and applied research organization.
- Served as VP of one of Philadelphia area's first multi-hospital systems.
- Delivered numerous presentations on health care industry trends and related financial, compliance and patient care issues at programs sponsored by wide array of organizations.
- Appeared as expert witness in Federal bankruptcy and various state courts and arbitration panels in health care related litigation and arbitration cases between 2000 and 2007 including contract disputes, valuation disagreements, determinations of damages, loan defaults, and bankruptcy restructurings.
- Co-founder of ZAC Capital Partners and ZAC Management Group and its predecessor firm.
- Assisted clients in financing complex health care development projects, mergers and acquisitions and establishing new businesses with specialty in structuring complex situations involving multiple investors and/or lenders where joint ventures and other strategic relationships exist.
- Acted as financial advisor on approximately 20 financings with aggregate funding in excess of \$2B.
- Evaluated and implemented wide range of health care businesses, joint ventures, and clinical programs during early part of career as consultant to health care clients. Served as Manager for regional consulting firm.

## RELEVANT PROFESSIONAL EXPERIENCE

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**TRIDENT USA HEALTH SERVICES** –Sparks, MD **2009 – Present**

**Senior Vice President Strategy, Business Development, and Government Relations**

- Trident USA Health Services is the leading national provider of support services to post-acute care industry (clinical laboratory services, portable x-rays, bedside ultrasound services, vascular access support, podiatry/vision care/audiology/dental and primary care nurse practitioner services).
- Customers include skilled nursing facilities, assisted living and independent living facilities, home care agencies, hospice providers, and long-term acute care hospitals.
- Trident operates in 46 states and serves over 9,500 skilled nursing and assisted living facilities.

**ZAC MANAGEMENT GROUP/ZAC CAPITAL PARTNERS** – Philadelphia, PA **2004 - Present**

**Managing Director**

- ZAC focuses on investments in the long-term care, ancillary services, and outpatient sectors of health care industry.
- Previous investments include National Hospice Holdings d/b/a Life Choice Hospice and Solamor Hospice (sold in 2013); Mobilex USA, American Diagnostics Services, and US Laboratories (sold in 2008); VantaHealth Technologies (provider of decision support solutions to home care industry; exited in 2006 with sale to publicly traded health care IT company); ZA Consulting (sold to its management in 2005); and Health Directions, interim management company serving large medical groups and faculty practice plans (exited in 2005 with a sale to its management).

**UNIVERSITY OF FLORIDA HEALTH PROTON THERAPY INSTITUTE** - Jacksonville, FL **2001 – Present**

**Financial Advisor to Board of Directors**

- University of Florida Health Proton Therapy Institute is the leading proton therapy center in Southeast US and leader worldwide in treatment, research and education for proton therapy.
- UFHPTI is a non-profit, academic medical and research center affiliated with University of Florida College of Medicine and the University of Florida Shands Jacksonville Cancer Center.

**ZA CONSULTING** – Jenkintown, PA

**1990 – 2003**

**Managing Director, 1995-1993; Director, 1991 – 1995; President, 1990 - 1991**

- ZA Consulting and its predecessors the Health Care Services Group of Zelenkofske Axelrod & Co. and Zelenkofske Morrison Associates was a national health care consulting firm with specializations in post-acute care sector, hospital/physician integration, managed care contracting, compliance services and health care litigation support.

**LAVENTHOL & HORWATH** – Philadelphia, PA

**1985 - 1990**

**Senior Principal, Health Care Consulting**

- Laventhol & Horwath was a national accounting, tax and consulting firm with consulting practice specializing in the health care industry.

**ECRI Institute** (formerly The Emergency Care Research Institute) - Plymouth Meeting, PA

**1980 - 1985**

**Vice President, Consulting and Risk Control Services**

- ECRI Institute, a nonprofit organization, is world's leading independent source of evidence-based research on effectiveness of medical procedures, devices, drugs and processes. Its consulting group serves hospital, government agencies, insurers and policy makers in the US and internationally.

**MERCY CATHOLIC MEDICAL CENTER** - Darby, PA

**1975 – 1980**

**Vice President, Planning and Facilities Development**

- Mercy Catholic Medical Center was a health care system in the Philadelphia area which operated two acute care hospitals plus several outpatient facilities.

**MERIDIAN ENGINEERING** - Philadelphia, PA

**1969 – 1974**

**Project Manager**

- Meridian Engineering was a Philadelphia based project management firm which included a group specializing in the management of capital projects for hospitals and other health care organizations.

## **EDUCATION**

**Drexel University**

**Philadelphia, PA**

- Advanced studies in Biomedical Engineering & Clinical Physiology

**Villanova University**

**Villanova, PA**

**Bachelor of Science in Engineering, Magna Cum Laude**

## **PROFESSIONAL ASSOCIATIONS**

- American Clinical Laboratory Association - representative from Trident USA Health Services
- National Association for Support of Long Term Care - representative from Trident USA Health Services
- Past memberships in variety of additional health care and other professional organizations including American Hospital Association, American Medical Group Association, Medical Group Management Association, Association for the Advancement of Medical Instrumentation, Healthcare Financial Management Association and National Association of Certified Valuators and Analysts

## **BOARD MEMBERSHIP**

**National Home Care Holdings/Millennium Home Care** – Broomall, PA

**2010 - Present**

**Member, Board of Directors**

- National Home Care Holdings (via its operating subsidiary Millennium Home Health Care) provides Medicare-certified home health care services including skilled nursing, physical therapy, occupational therapy, speech pathology, medical social work and home health aide services to ill or disabled older adults.
- Millennium Home Care serves PA and DE markets with focus on care for patients discharged from skilled nursing facilities.

**Bicycle Coalition of Greater Philadelphia** – Philadelphia, PA **2012 – Present**

Member, Board of Directors

- Bicycle Coalition of Greater Philadelphia promotes bicycling as healthy, low-cost, and environmentally-friendly form of transportation and recreation.

**Cadence Cycling Foundation** – Philadelphia, PA **2010 – 2013**

Member, Board of Directors

- Cadence Cycling Foundation was a nonprofit youth development organization that used sport of cycling as means to connect with underserved youth and help them grow into healthy, happy, and responsible adults.
- In October 2013, Cadence Cycling Foundation merged with the Bicycle Coalition of Greater Philadelphia to form largest cycling advocacy organization in country.

**National Hospice Holdings/Life Choice Hospice/Solamor Hospice** - Rivers Edge, NJ **2009 – 2013**

Member, Board of Directors

- Life Choice Hospice provided hospice services to patients in 13 states with focus on care of patients discharged living in skilled nursing and assisted living facilities.
- Utilize interdisciplinary team approach with RN Case Managers, CNA's, Social Workers, Chaplains, Volunteers and Medical Directors collaborating to ensure quality care and compassionate option to treatments incorporating wishes of patients and loved ones in all end-of-life decisions. It is care that controls pain and symptoms associated with terminal illness – physical, emotional, social and spiritual.
- In August 2013, Life Choice Hospice and Solamor Hospice were acquired by Trident USA Health Services. In 2014, they were combined into Hospice Compassus, national provider of hospice care services.

**USA Triathlon Mid-Atlantic Region** – Philadelphia, PA **2004 - 2013**

Board Member, Treasurer and Vice Chair

- USA Triathlon is official governing body of sport of triathlon in United States.

**Mobilex USA** – Horsham, PA **2003 - 2008**

Member, Board of Directors

- Mobilex USA was the largest provider of portable x-ray, ultrasound, and clinical laboratory services to long-term care industry in the nation
- Acquired December 2008 by Audax Group and Frazier Health Venture as part of creation of Trident USA Health Services.

**US Laboratories** – Newtown, PA **2005 – 2008**

Member, Board of Directors

- US Laboratories, a predecessor to Trident USA Health Services, provided clinical laboratory services to skilled nursing facility patients in the State of Massachusetts.

**National Association for the Support of Long Term Care** – Washington, DC

Member, Board of Directors/Chair, Diagnostic Testing Committee

- NASL is a trade association representing providers of services to the patients of the long-term and post-acute care sector including providers of rehabilitation therapy, clinical laboratory services, and portable x-ray services along with vendors of health information technology who serve skilled nursing and assisted living providers

**Additional Board, Finance & Advisory Committee Membership**

- National Multiple Sclerosis Society
- Leukemia and Lymphoma Society
- Germantown Academy
- Oak Lane Day School

## **SPEAKING ENGAGEMENTS**

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Delivered numerous presentations on health care industry trends and related financial, issues at programs sponsored by wide range of organizations including:

- Pennsylvania Bar Institute
- Association for Advancement of Medical Instrumentation
- Pennsylvania Institute of Certified Public Accountants
- Healthcare Financial Management Association
- American Medical Group Association
- Canadian Medical & Biological Engineering Society
- American College of Emergency Physicians
- American Public Health Association
- American Society of Appraisers
- Radiological Society of North America
- National Health Lawyers Association
- American Hospital Association
- American Medical Association
- American College of Cardiology
- National Investment Conference for Senior Living Industry

## **TEACHING EXPERIENCE**

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Served as Visiting Lecturer for health care management, allied health sciences and public health undergraduate and graduate programs for several United States colleges and universities and for United Nations' agency sponsored initiatives in Israel, Turkey, and elsewhere in the Middle East.

## **EXPERT ENGAGEMENTS**

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### **Glenwood Resolution Authority, Inc. v. Vantage Health Plan, Inc.**

American Arbitration Association

Civil No. Not known

February 2007

### **Robert Klein, et al v. Howard Wershale & Co., et al**

Case No. CV-2 462739

March 2006

### **Aim High Income Municipal Fund, et al v. Temple University Health System, Inc.**

Civil No. Not known

November 2004

### **LaSalle Bank National Association as Trustee for Certificate Holders of Asset Securitization Corporation Commercial Mortgage Pass Through Certificates, Series 1997-D5**

Case No. 00CIV 8720 (NRB)

September 2003

### **Stephen B. Cantrell, D.D.S., M.D., Bringing this Action on Behalf of the United States Government against New York University, et al.**

Civ. No. 00 Civ. 8209 (LAK) (KNF)

June 2003

### **LaSalle National Bank Association Trustee for Certificate holders of Securitization Corporation, Commercial Mortgage Pass Through Certificates, Series 1998-D7, by and through Lennar Partners, Inc. as Special Servicer v. Nomura Asset Capital Corporation and Asset Securitization Corporation**

Civil No. 02 CV 9916 (RLC) (S.D.N.Y.) (NRB)

May 2003

### **David Yazdan, M.D. v. Jersey Shore Medical Center of Meridian Medical Center, Inc., et al**

Superior Court of New Jersey

Law Division/Monmouth County

Docket No. C6390-97

December 2002

### **Blue Cross of Massachusetts vs. Caremark, Inc.**

Civil No. Not known

November 2002

**University of Utah, ex rel. University Hospital & Clinics,**

University of Utah Medical Group and University of Utah Health Network vs. United Health Care of Utah, Inc.  
Civil No. AAA 81 Y 195 00115 01  
American Arbitration Association  
October 2002

**Penn West Associates, Inc., Debtor**

Chapter 11 Bankruptcy (Re: Wilkins House Nursing Home)  
USBC/Western District of PA  
Civil No. 99-21950-MBM  
October 2001

**Omnia, Inc. vs. Oxford Health Plans (PA), Inc.**

Civil No.: AAA No. 14 193 00305 99 H/K.  
American Arbitration Association  
July 2000

**In Re Episcopal Hospital**

O.C. No. 959 of 1998  
Orphan's Court Division, Court of Common Pleas of Philadelphia  
July 2000

**Summit Medical Group, P.A. vs. AETNA Health Plans of New Jersey and AETNA US Health Care**

American Arbitration Association  
Civil No. 18 Y 193 00054 00  
April - August 2000

**ADDITIONAL EXPERIENCE**

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**AAS REALTY ASSOCIATES – Philadelphia, PA**

**2002 - Present**

**Co-owner**

- AAS Realty Associates owns and manages residential real estate in Philadelphia, PA and Bethany Beach, DE.

**LIBERTY SPORTS DEVELOPMENT dba PHILLY CYCLING CLASSIC – Philadelphia, PA**

**2013 -2014**

**Founder and President**

- Liberty Sports Development, a non-profit organization, produced PARX Casino Philly Cycling Classic in 2013 and 2014, a USA Cycling and UCI sanctioned professional circuit race.
- The race featured start and finish line at top of iconic Manayunk Wall, a course through Philadelphia neighborhoods of Manayunk, Roxborough, East Falls, and Fairmount Park.
- It was first USA Cycling and UCI race in US with equal prize money for women's and men's races.

**PHILADELPHIA TRIATHLON – Philadelphia, PA**

**2005 – 2012**

**Founder and Co-owner**

- Philadelphia Triathlon founded and produced Philadelphia Insurance Triathlon, SheROX Women's Triathlon Series, and Ironman 70.3 Pocono Mountains.
- In 2012, Philadelphia Insurance Triathlon and SheROX Women's Triathlon Series were sold to Competitor Group, Inc.

**PHILANTHROPY**

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- Active fundraiser for charitable and community service organizations including Sunday Love Project (Philadelphia) National Multiple Sclerosis Society, Leukemia and Lymphoma Society, and Teal Ribbon Ovarian Cancer Research Foundation.

**INTERESTS**

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- Cycling and swimming
- Former marathon and Ironman distance triathlete competitor
- Animal rescue