

# DR. DANIEL BERMAN

## DBA/HCA, MSN, RN, FACATA, FACHE

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### Healthcare Executive, Healthcare Innovator and Entrepreneur, Healthcare Strategist, Healthcare Marketing. Case Management, Utilization, and Cost Containment

**Motivating Philosophy: The Development of Innovative Healthcare Programs for All in a Prudent Fiscal Fashion**

*Extensive experience in strategizing, innovating, and developing capital streams for healthcare ventures.*

Respected and trusted advisor to C-suite and other senior executives regarding innovation and transformation in nursing and healthcare delivery leveraging evidence-based leadership and patient-centered models. Industry thought leader with robust research, presentations, and peer-reviewed publication history on a broad range of high-profile, critical topics. Dedicated to uncovering novel approaches to address systemic issues in the US healthcare system while maintaining financial viability of healthcare organizations. Recognized as one of the Top One Hundred Healthcare Leaders in the US by the Top One Hundred International Leaders Magazine. Fellow of the American College of Healthcare Executives.

#### Highlights of Expertise

- Disaster Preparation in Healthcare
- Health Policy Development & Advocacy
- Healthcare Service Delivery Innovation
- Quality Management & Quality Improvement
- Evidence-based Leadership
- Executive Coaching, Advising & Guidance
- Corporate Board and Advisory Board Development
- Healthcare Consumer Advisory Panels
- Owner and Principal for Healthcare Emerging Companies
- Healthcare Venture Capital and Angel Investors
- Expert Testimony on Managed Healthcare for State Legislatures
- Population Health Management
- Managed Care Healthcare Models
- Healthcare Reform & ACA Impacts
- Vulnerable & Indigent Populations
- Behavioral & Mental Health Management
- Cost Effectiveness & Access Improvement
- Correctional Healthcare
- Home Healthcare & Hospice
- Health Maintenance Organizations
- Healthcare Startup & Turnaround Expert
- Healthcare Mergers & Acquisitions

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#### NOTABLE CONTRIBUTIONS

- “The IDEA Principles of Innovation for Nursing and Healthcare: A Model of Innovation for Healthcare and Nursing Adapted from the Innovation Model by Boyton.” Model allows healthcare managers to develop approach of innovation and address the question of why healthcare managers need to challenge conventional wisdom.
- “The Dynamic Balance: A Model for Healthcare Delivery Transformation.” Model enables leaders and management to guide organization to an environment of equilibrium.

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#### SERVING ON THE BOARD OF DIRECTORS

- Healthcare Leaders Media & Healthcare Leaders Intelligence Council
- Recovery with Dignity
- Head Start Association
- Maryland State Legislators Association
- Florida Nurses Association
- Visionary Healthcare Consultants
- Island Beach Resort Condominiums
- Medical Safety ION
- Dynamic Brain Centers
- Treasure Coast ACHE Chapter

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# DR. DANIEL BERMAN

Page 2

- Fit for Life

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## PRINCIPAL AND OWNER OF HEALTHCARE COMPANIES

- Recovery with Dignity, A Substance Abuse Outpatient Counseling Center
- Visionary Healthcare Reengineering Consultants, A Healthcare Consulting and Advisory Company
- Visionary Healthcare Institute, A Not-for-Profit Industry Research Center
- Healthcare Innovation Institute, A Healthcare Innovation Center
- Dr. Dan Berman, A Healthcare Thought Leadership Center
- Dynamic Brain Center, A Residential Treatment Center for Closed Head Injuries and Concussions

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## PUBLIC SPEAKING

Dr. Berman has provided public speaking services for multiple organizations; highlights include:

- Population Health and Chronic Diseases: Seminar covers how to organize care within specific disease categories, understand the economic benefits of providing care in this model, and how to implement this model within their specific healthcare organization.
- Innovation and Change in Healthcare: Seminar covers what healthcare entrepreneurship and entrepreneurialism in healthcare is, existing innovation and change models in healthcare and how they apply today, and generating and developing new innovative approaches to healthcare.
- Healthcare Delivery and Legislative Issues: Seminar deliberates where the predictive future for healthcare delivery is going for the next five to seven years. Includes a review of economic trends facing healthcare, how healthcare legislation is created, how it impacts healthcare delivery at state and federal levels, and how it factors into present state and federal legislation and elections.

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## PROFESSIONAL EXPERIENCE

Various Engagements, Multiple Locations

**Executive Healthcare Consultant**, 2006 to Present

Offer expert consulting and advising on a broad range of issues impacting healthcare administration, healthcare delivery, consumer education, and cost management.

- *Vice President of Business Development and Planning*, 2018 to Present, Dynamic Brain Center, Denver, CO: Drive business development strategy and execution.
- *Chief Innovation Officer*, 2015 to Present, Center for Health Practitioner Innovations, Fernandina Beach, FL: Spearheaded launch of new company, generating \$3M in revenue.
- *Founder & Chief Executive Thinker*, 2010 to Present, Center for Healthcare Thinking and Innovation, Jensen Beach, FL.
- *Project Consultant*, 2009 to Present, Mental Health Association of Palm Beach County, Palm Beach, FL: Primary researcher and program consultant for grant-funded project developing model to integrate primary medical care and behavioral healthcare in Palm Beach County.
- *Pathways to Excellence Surveyor*, 2008 to Present, American Nurses Credentialing Center, Washington, DC: Serve as a surveyor for the Pathways to Excellence Certification Program a division of the Hospital Magnet Program
- *Chief Strategy Officer, Chairman of the Board, and Founder*, 2016 to 2017, Center for Healthcare Innovations and Healthcare Innovation Institute, FL & IA: Conceptualized, launched, and led full-service management and solutions consulting group and innovation incubator, respectively.
- *Consultant Surveyor*, 2006 to 2009, Mental Health Association of Palm Beach County, Palm Beach, FL: Surveyed and certified healthcare delivery systems for jails and prisons in the process of receiving accreditation.
- Major working projects and published articles, 2014 to 2015:
  - Wrote and published on national healthcare discussion and need to pressure healthcare leaders to transition from outcome-focused to patient-centered approach; operational utilization of DNP vs PhD in Nursing for improvement

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# DR. DANIEL BERMAN

Page 3

in cost effectiveness; importance of assisting consumers in understanding need to maintain awareness of changing healthcare landscape and role in providing services to consumers and healthcare constituents.

- Developed quality metric and analytics courses University of South Dakota’s medical school programs.
- Designed national model on dynamic balance, recognized as accepted and dedicated model for the improvement of delivery of healthcare through systems change agents working within a delicate balance of cost effectiveness and quality of care.
- Gathered and interpreted qualitative data on benefit of education models for improvement of professional development of nursing students and related healthcare providers.

AIDS Healthcare Foundation, Los Angeles, California

## **Quality Improvement Director, 2005 to 2007**

Oversaw Quality Improvement (QI) for staff model outpatient clinics and managed care division of Medicare and Medicaid Special Needs contracts. Served as Clinical Quality Expert charged with developing quality projects, conducting applied quality research, designing and analyzing data searches, and influencing change recommendations for multiple areas: medical staff quality, provider peer review, clinical nursing, administrative efficiency, pharmacy and therapeutics, managed care division, state and national accreditation, adherence protocols for chronic disease states, research committee, coordination of benchmarking study, risk management, medical records, nursing education, home health quality improvement. Assisted with evaluation of AIDS/HIV training for global programs. Acted as legislative and regulatory compliance advisor.

- Restructured and expanded QI one department with seven indicators to seven departments with 35 indicators along with benchmarking projects with medical and nursing staff, Lean Sigma practices, national standards for various disease states, and regulatory compliance requirements.
- Spearheaded implementation of Root Cause Analysis (RCA) and FEMA structures.
- Collaborated with Chief of Medicine to provide expert advice on improving provider behavior and developing of clinician/provider report cards.
- Achieved and maintained 100% participation in system-wide quality improvement during entire tenure as Quality Clinical Expert.
- Drove 50% reduction in physician non-compliance with treatment regimens.

MHMRA of Harris County, Houston, Texas

## **Director of Inpatient Services/Director of Nursing, Inpatient Care, 2001 to 2005**

Earned promotion from Director of Nursing to Director of Inpatient care after only six months. Directed licensed and non-licensed nursing for a 176-bed, publicly-funded, freestanding, inpatient acute care mental health hospital within a correctional facility providing substance abuse and mental health services. Indirectly supervised 110-member staff of licensed nurses, nurses’ aides, social workers, nurse discharge planners, caseworker aides, and counselors. Monitored medication errors and reviewed quality of nurses’ notes. Attended daily case management meetings with Medical Director to ensure accuracy of information prior to communication to staff; conducted rounds twice per-day. Handled scheduling, overtime, and FTE utilization. Administered contracts with labs, offsite pharmacy services, and staffing agencies. Managed budgets and cost control.

- Enforced adherence to nursing policies by chairing bi-monthly nursing leadership team meetings as well as rewriting and implementing policies to comply with Texas’ Nurse Practice Act.
- Orchestrated implementation and oversaw risk management programs and clinical preparations for accreditation visits and investigations by state agencies.
- Chaired Quality Improvement Committee and Patient Care Committee; served as member of Patient Safety Committee, Senior Management Committee, and JCAHO Task Force
- Decreased reliance on outside nursing agencies by 25% while reducing internal staff overtime by 25% over the course of three years.
- Overhauled process for updating patient documentation that addressed long-standing physician complaints, increased accuracy of information flow, and streamlined discharge.

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# DR. DANIEL BERMAN

Page 4

- Established incident reporting system that empowered managers to proactively correct potential safety issues.
- Initiated and led innovation performance improvement project that dramatically reduced medication errors from 75% to 25%.
- Launched case management and electronic medical record software resulting in increased productivity, efficiency, and performance.

## Additional Experience:

**Independent Legal Nurse Consultant** (Malpractice Defense, Managed Care Litigation, Workers' Compensation, Criminal Defense, and Impaired Healthcare Professionals Cases)

**Director of Case Management, Social Services, Discharge Planning, and Crisis Intervention**, Brazosport Memorial Hospital

**CEO and Senior Consultant**, Visionary Healthcare Consultants

**Deputy Director**, Tri County Health Action

**Faculty Member & Thesis Advisor**, Walden University, St. Joseph's University, and others

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## EDUCATION & CREDENTIALS

**DBA, Healthcare Administration** – Northcentral University, Phoenix, AZ

*Dissertation: Exploration of Attitudes of Hospital Executives Towards Fiscal and Quality Care Concerns, When Providing Services to Consumers in a Natural Disaster.*

*Methodology: Qualitative Research and Trend Analysis*

**M.S., Nursing, Emphasis in Healthcare Administration** – St. Joseph's College of Maine, Standish, ME

*Thesis: Cost Effectiveness of Substance Abuse Treatment for the Impaired Nurse.*

*Methodology: Qualitative Research and Trend Analysis*

**Healthcare Risk Management Certification** – University of Florida

**Nursing Legal Consulting Certification Program** – Vickie Milazzo Institute of the National Alliance of Certified Legal Nursing Consultants

**Therapeutic Recreation, Focus in Urban Studies** – University of Massachusetts, Amherst, MA

**Licensed Active Professional Registered Nurse**, FL, NC, MN, IA, TX, WA

**Licensed Healthcare Risk Manager**, FL

**Certified National Quality Healthcare Professional**, National Healthcare Quality Certification Board

**Professional Affiliations:** Fellow, American College of Healthcare Executives; Fellow, Health Policy National Academy of Practice; Fellow, American College of Addiction Treatment Administrators; Professional Healthcare Advisory Board, The Wall Street Journal; Intelligence Council, Healthcare Leaders Publications; American College of Healthcare Executives; National Associations of Healthcare Quality; American Association of Healthcare Case Management; National Rural Health Association; American Association of Healthcare Journalists; Institute for Healthcare Coaching of Harvard Medical School; Florida Nurses Association; American Association of Managed Care Nurses

**Peer Reviewer & Editorial Advisor:** *Journal of Healthcare Quality; Journal of Correctional Healthcare; Journal of Healthcare Management; Health Administration Press and Publishing Company*

**Grant-funded Research, Publications, Presentations, Speaking Engagements & Other Professional Activities:** Details available upon request