

# The Physician-MBA & Occupational Medicine

## Occupational and Environmental Medicine Residency Program

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**From the OEMR Program Director & Associate Professor:  
Stefanos N. Kales, MD, MPH, FACP, FACOEM (OEMR 1993)**

Physician-MBA's (MD-MBA's) are uniquely qualified to take on leadership roles in the corporate world, empowering organizations to improve healthcare-related decisions, services, and health-related expenditures with their medical expertise, strategic vision, and management skills.

Likewise, physicians trained in Occupational and Environmental Medicine (OEM) are sought for their expertise in optimizing the health of a workforce and employing strategies to make the workplace both safer and more productive. Thus, OEM residency training affords the MD-MBA additional advantages in preparation for future management and executive leadership positions.

Rising healthcare costs, the "diabesity" epidemic, and sociopolitical uncertainties have prompted major employers to assess their strategies with a renewed emphasis on prevention and disrupting the trend of escalating costs driven by chronic disease (diabetes, obesity, arthritis, heart disease, etc.). Applying current research in productivity and health management affords the MD-MBA a unique perspective and skills that can add significant value to an organization's ability to respond to the rapidly evolving healthcare and economic climate.

Additionally, OEM is a diverse field that provides vast opportunities to practice medicine, consult, and/or conduct research at various interfaces of business and medicine. Career satisfaction in OEM is also high. A 2012 study published in the Archives of Internal Medicine found that preventive medicine, including occupational and environmental medicine, has the lowest prevalence of physician burnout and the highest prevalence of satisfaction with work-life balance. A number of Harvard Occupational Medicine graduates who are physician-MBA's are featured in this brochure, highlighting the rich career possibilities that our specialty provides to people with such combined training.

There is a major leadership void looming in US industry, as the baby boomer generation—40% of the current workforce—will begin moving into retirement age over the next 5 - 10 years. This represents a remarkable opportunity for those who have the vision to recognize the gap and a willingness to prepare themselves for the change. This is precisely why Harvard Occupational Medicine residency training for MD-MBA's represents such a compelling career opportunity - specialty training incorporating medical expertise and business management coupled with the nation's

most powerful network of alumni and best known "brand."

We offer two pathways to Board Certification in Occupational Medicine: a 2-year Categorical Program and a 1-year Complementary Pathway. The Categorical Program can be entered after a transitional internship or a full clinical residency, such as internal medicine. The Complementary Pathway is available to those who already hold other board certification and have at least two years of career experience in OEM. Thus, regardless of the stage of your career, we have a program for you.

Do not hesitate to contact me directly with questions about an occupational medicine career. I can be reached through our website, at [skales@hsph.harvard.edu](mailto:skales@hsph.harvard.edu), or by phone, (617) 665-1580.

-Stefanos N. Kales, MD, MPH



## Samuel A. Forman, MD, MPH, MSOCC, MBA, FACOEM (OEMR 1980)



### Dr. Sam Forman

- Harvard School of Public Health OEMR
- Yale School of Management
- President, Oak and Ivy Health Systems

Dr. Forman is currently the President of Oak and Ivy Health Systems, a consulting firm focusing on health-related business strategy, chronic disease management, clinical quality improvement, business investments, applied toxicology, and historical issues of relevance to modern society. He is a graduate of

Harvard School of Public Health's Occupational Medicine residency, and he completed his MBA at the Yale School of Management.

Following occupational medicine leadership positions in the United States Navy and Procter and Gamble, Dr. Forman entered insurance medicine, becoming a Medical Director at Blue Cross Blue Shield Health Centers. Subsequently, he served as the co-founder and Chief Medical Officer of StatusOne Health Systems (1997-2004). Status One's innovations combined predictive modeling, intranet software, and nursing services, as well as financial and clinical performance measurements in caring for high-risk workers and their dependents and for Medicare beneficiary populations. During this time, Dr. Forman co-authored Status One—Breakthroughs in High Risk Population Health Management. StatusOne was eventually acquired by Healthways, Inc., a company that has fully integrated StatusOne's products, services, and employees.

With Dr. Kales' vision and encouragement, Dr. Forman has returned to his favorite program within the OEM Residency: the Initiative for Productivity and Health Management

(IPHM). It has brought to the forefront many of the challenging issues that businesses face when dealing with the health of their workforces, and it has sponsored symposia that showcase best-practice programs for controlling non-occupational health programs within business and integrating them with more traditional programs. The American College of Occupational and Environmental Medicine now recognizes health and productivity management within the scope of the profession and offers its own short courses in the field.

Dr. Forman is also instrumental in HSPH's MD-MBA Initiative, which will be the next big step in preparing a new generation of leadership to tackle all kinds of health issues in a holistic manner for large and small employers alike. It will prepare medical leaders and practitioners who can integrate and internalize business approaches to program management and cost efficiencies, while developing effective approaches for both occupational and non-occupational conditions.

## Erik Won, DO, MPH, MBA, FACOEM (OEMR 2004)



### Dr. Erik Won

- Harvard School of Public Health OEMR
- University of Southern California, Marshall School of Business
- Chief Physician, Southern California Region, The Boeing Company

Dr. Won attended the University of Notre Dame for his undergraduate studies, Nova Southeastern University College of Osteopathic Medicine for medical school, and the Harvard Occupational and Environmental Medicine Residency Program.

Dr. Won began his medical career as a US Navy Flight Surgeon and completed a tour forward deployed with the 11th Marine Expeditionary Unit (Special Operations Capable). He subsequently worked for a non-profit

medical group, St. Jude Heritage Medical Group, before accepting a position with the Boeing Company.

The Boeing Company generously funded Dr. Won's MBA at the Marshall School of Business, and he currently serves as Chief Physician, Southern California Region. He enjoys a diverse scope of work which includes direct patient care, consultation on Aerospace Medicine projects, Chair for the Occupational Health Examination (OHE) Committee, Chief Technology Officer for Health Services, involvement in public health emergency planning, toxicology consultation, and a wide variety of administrative duties.

## Lee Okurowski, MD, MPH, MBA (OEMR 2002)



### Dr. Lee Okurowski

- Harvard School of Public Health OEMR
- Wharton Business School
- Founder and CEO, Occupational & Environmental Health Network, Inc.

Dr. Okurowski is the founder, CEO, and Principal of Occupational & Environmental Health Network, Inc. (OEHN), which is located in Marlborough, MA. OEHN provides employee health solutions for government, corporate, educational, and research entities throughout the country. OEHN is also a key clinical training site for HSPH OEM residents.

Dr. Okurowski provides Medical Director leadership and oversight across multiple hospital and business segments, including Steward Healthcare, Covidien Corporation, New England Baptist Hospital, University of Massachusetts UCare Clinic, SunLife Insurance Co., and Massachusetts Department of Human Resources.

Dr. Okurowski graduated from Dartmouth Medical School and went on to

earn a Master of Public Health in Health Policy and Management/Occupational Medicine from the Harvard School of Public Health. He also earned a Master of Business Administration from The Wharton Business School of the University of Pennsylvania. He is Board Certified in Occupational and Environmental Medicine.

Dr. Okurowski is a member of numerous professional medical organizations, including the American College of Occupational and Environmental Medicine, the New England College of Occupational and Environmental Medicine, the American Medical Association, and the American College of Physician Executives.

## Sachin Kapoor, DO, MPH, MBA, FACOEM (OEMR 2005)



### Dr. Sachin Kapoor

- Harvard School of Public Health OEMR
- New York Institute of Technology School of Management
- Medical Director of Employee Health and Specialty Clinical Director of KP Health-Connect, Northern California, Kaiser Permanente

Dr. Kapoor attended medical school at the New York College of Osteopathic Medicine, where he simultaneously earned an MBA

with distinction. Prior to coming to HSPH, he completed Internal Medicine training at Robert Wood Johnson University Hospital in New Jersey, and he is board certified in Internal Medicine as well as Occupational Medicine.

On the subject of OEM, Dr. Kapoor says that “The practice of Occupational Medicine epitomizes the direction in which health care in the United States is heading, as it focuses on preventive health and requires communication and coordination among many stakeholders to achieve optimal outcomes for patients. Occupational Medicine physicians are integral in the communication between patients, employers, insurance carriers, and the community. Candidates who have elected to pursue a combined MD-MBA understand that traditional medical practice, within the confines of a doctor’s office, can limit the influence and ability of a physician to make significant changes in the health of communities. They know that attaining a stronger understanding of the business aspects of medical care is essential in today’s rapidly changing and globalized environment. Having a solid understanding

of the health care delivery model and population medicine completes the armamentarium required of physician leaders today. During Occupational Medicine training, candidates complete a Masters of Public Health degree, and acquire, among many things, a macroscopic understanding of health care delivery around the world.”

Dr. Kapoor works for The Permanente Medical Group, and his training in Occupational Medicine fits very well with the preventive focus of Kaiser Permanente. In his leadership roles with the organization, he often gives talks to large employer groups on wellness, workplace health, and strategies to control their rising healthcare costs. His training in Occupational Medicine and Masters Degrees in Business and Public Health add credibility and help him move ideas from the whiteboard to practice. He says, “In the end, physicians want to make a difference in people’s lives. Through leadership and a focus on population health, which Occupational Medicine training provides, the influence is magnified, and the results can be astonishing.”

## Ibe Mbanu, MD, MPH, MBA, FACOEM (OEMR 2006)



### Dr. Ibe Mbanu

- Harvard School of Public Health OEMR
- Yale School of Management
- Lead Physician/Laboratory Direct, NextCare Urgent Care Centers
- Assistant Professor, Eastern Virginia Medical School

Dr. Mbanu received his MD from Wayne State University, received an MPH from the University of Michigan, and completed the OEM Residency at HSPH. He is board certified in Internal Medicine and Occupational Medicine, and he has also received an MBA from the Yale School of Management.

After completing his OEM training at HSPH, Dr. Mbanu stepped in as

Medical Director for Bon Secours Health System/Mary Immaculate Hospital's Occupational Medicine Department. In this role, he oversaw clinical services for a client portfolio of nearly 200 companies that included Pepsi, Federal Express, and Northrop Grumman. He was charged with assisting corporations in the management of employees' health by providing medical care, performing surveillance programs, and conducting workers' compensation consultations.

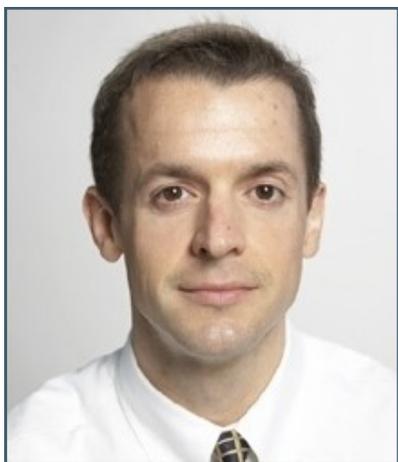
During this time, Dr. Mbanu also had the privilege of serving his community through his role as City Medical Officer for Newport News, VA. In this position, he was responsible for addressing pertinent health issues as they related to various departments, including fire, police, and deputy sheriff. As he assumed more responsibilities, including Chairman of Mary Immaculate's Ambulatory Medicine department, it became more apparent that he could further his career with business skills and acumen. As he says, "The healthcare landscape is rapidly evolving. There is tremendous pressure on employers, healthcare systems, and communities. Effective physician leaders must be able to understand the financial ramifications of their clinical and policy decisions."

This realization served as the impetus for Dr. Mbanu returning to school to

obtain a Masters of Business Administration. Shortly thereafter, he took on the role of head of the Hospitalist Medicine Department at Reston Hospital. His team of physicians managed the majority of all non-surgical admissions. Dr. Mbanu's fiduciary responsibilities included oversight of departmental budgeting, profit and loss targets, and quality metrics. As he puts it, "Medical school gave me the building blocks for becoming an excellent physician. It didn't give me the critical tools necessary to manage and lead. Business school did."

Dr. Mbanu has crafted a successful career as a physician executive serving in various leadership positions across the care continuum. He currently serves as a Lead Physician/Laboratory Direct for NextCare Inc. in their Virginia market. NextCare provides Urgent Care and Occupational Medicine services across the country. He will be transitioning to a new position in the coming months as Chairman of Medicine and Head of Adult Hospitalist Medicine for St. Mary's Hospital in Richmond, VA. He also serves as a board member for Virginia Health Information (VHI) and the Medical Society of Virginia, where he is also Treasurer and Finance Chair for their foundation.

## Britt Hatfield, MD, MPH, MBA, FACOEM (OEMR 2005)



### Dr. Britt Hatfield

- Harvard School of Public Health OEMR
- Columbia Business School
- Area Medical Director, US Healthworks

Dr. Hatfield refers to his time at the Occupational and Environmental Medicine Residency at Harvard as "a great learning experience! I highly value my strong professional relationships developed at Harvard."

After Dr. Hatfield completed his residency in 2005, he joined the faculty at The Mount Sinai School of Medicine in Manhattan, NY. While he was serving on the faculty at Mount Sinai, the American Medical Association awarded him their Community Service Award in

2007 for his work on the World Trade Center Health Effects Treatment Program. During this time, he also completed an MBA at Columbia Business School.

Following completion of the MBA, Dr. Hatfield joined Concentra in 2008, and he served as Concentra's Area Medical Director for Northern California, where he was responsible for seven high volume medical centers in San Francisco, Oakland, San Leandro, Richmond, Rohnert Park, and Santa Rosa.

In May 2012, Dr. Hatfield joined US Healthworks as the Area Medical Director for twelve high volume medical centers in Sacramento and in the Central Valley of California.

## Michael MacDonald, DO, MPH, MBA, FACOEM (OEMR 1996) Stephen MacDonald, DO, MPH, MBA, FACOEM (OEMR 1996)



**Dr. Michael MacDonald**  
**Dr. Stephen MacDonald**

- Harvard School of Public Health OEMR
- Florida Institute of Technology
- Co-Medical Directors, Health First Occupational Medicine

Drs. Michael and Stephen MacDon-

ald, brothers, on the link between the MD-MBA degree and OEM training: “During the traditional Occupational and Environmental Medicine (OEM) Residency Training experience, physicians will earn a Master of Public Health (MPH) degree to educate them in the dynamics of evaluating, monitoring, and educating working populations. They will also acquire the clinical expertise to evaluate and treat patients in diverse work environments with many different hazardous exposures. What is missing is the knowledge base earned through the acquisition of a Master of Business Administration (MBA) degree, which gives the OEM Physician the ability to understand business principles, cost-benefit analyses, etc.

The medical specialty of Occupational Medicine is an excellent fit for

MD-MBAs. The practice of Occupational Medicine involves a significant amount of interaction with various large and small employers and insurance carriers. The education associated with an MBA and the knowledge gained through Harvard’s Occupational Medicine residency training gives these physicians an enormous strategic advantage, as the MD-MBA has the ability and credibility to communicate effectively with the business leaders who hold the financial keys to make workplace environment changes. They represent the future leaders in this medical specialty, and they will have numerous opportunities in a variety of different settings to pursue their careers.”

### HSPH OEMR: A Premier Residency

The Preventive Medicine Residency in Occupational and Environmental Medicine (OEM) at the Harvard School of Public Health is one of the oldest in the United States and the nation’s leading program in Occupational Medicine. We prepare our graduates for leadership in clinical practice, industry, government, consulting, research positions in academic occupational and environmental medicine, and for many other careers that make a significant impact on public health.

We offer two pathways to Board certification in Occupational Medicine: the traditional 2-year Categorical Program and a 1-year Complementary Pathway. The Categorical Program is fully accredited by the Accreditation Council of Graduate Medical Education. The Complementary Pathway is open to select candidates holding appropriate prior board certification in another specialty and significant work experience in occupational medicine and is approved by the American Board of Preventive Medicine.

HSPH’s Initiative for Productivity and Health Management (IPHM) offers resident enrichment experiences in population based policies and health interventions via employment status. Residents gain from cutting edge symposia, career seminars, and personalized practice experiences.

Since 2000, HSPH OEM residents have won a total of 18 ACOEM research awards, and have been on the podium at ten of the last thirteen AOHC meetings. Since 2005, HSPH OEM residents have authored or co-authored over 35 publications resulting from their training.

HSPH OEMR graduates are trained in:

- Prevention, diagnosis, treatment, and rehabilitation of OEM disorders
- Assessment of causation, impairment, disability, and fitness for work
- Productivity and Health Management
- Planning, administration, and evaluation of OEM services
- Designing and implementing surveillance and medical screening programs
- Research methods in occupational and environmental medicine

For more information, please contact Dr. Stefanos Kales at [skales@hsph.harvard.edu](mailto:skales@hsph.harvard.edu). For assistance with applications, please contact Ann Backus at [abackus@hsph.harvard.edu](mailto:abackus@hsph.harvard.edu).



[Photo: 2011 second-year residents with Dr. Kales and Ann Backus.]

## Initiative for Productivity and Health Management

Productivity and Health Management (PHM) seeks to maximize the health of the workforce and its dependents for the mutual benefit of employees and their employers. The emerging field recognizes the interrelation of employees' health and well-being with employee satisfaction and an enterprise's health care costs affected by all of the following: healthcare expenses, absenteeism, disability, turnover, and productivity. Clinical as well as financial outcomes are of interest. PHM typically includes employees themselves as well as spouses, children, and others obtaining health insurance by way of employment status. Chronic illnesses such as hypertension, obesity, and diabetes are approached by way of employment-based health insurance benefits structures and targeted health interventions. Such interventions supplement traditional environmental health concerns caused or worsened by the working environment. Increasingly, occupational health leaders are called on to lead and carry out such programs, or to synergize with those who do. Business leaders are vitally concerned with the costs and structure of health care benefits and programs.



[Photo: Dr. Samuel Forman; John Mackey, Whole Foods CEO; and Dr. Stefanos Kales at the 2010 PHM Conference.]

In collaboration with Dr. David Christiani and HSPH's Office for Resource Development, Dr. Kales has envisioned the development of an Initiative for Productivity and Health Management housed within the OEMR. Dr. Sam Forman, HSPH Visiting Scientist and HSPH OEMR alumnus, was selected by our program to jumpstart the development of this new initiative. In 2011, Dr. Philip Parks, HMS Instructor in Medicine and HSPH OEMR alumnus, was recruited to join Drs. Kales and Forman on the PHM leadership team. The unique career trajectories and skill sets in health-related business strategy, chronic disease management, and clinical quality improvement of Drs. Forman and Parks bring added value to our traditional faculty, bridging academic and corporate environments.

As part of our efforts to develop resident enrichment experiences in PHM, involving population based policies and health interventions on behalf of workers and their families via employment status, the HSPH OEMR held its inaugural PHM conference on September 30 and October 1, 2010 in collaboration with HSPH's Center for Continuing Professional Education. The leadership colloquium was held at the Joseph B. Martin Conference Center of the Harvard Medical School, was co-directed by Drs. Kales and Forman, and hosted over 50 thought leaders from all over the United States and several countries. The colloquium featured over a dozen expert faculty members from academia, industry, insurance, labor, and consulting, as well as leaders of employment-based

health interventions. All of our residents attended the full conference as an integral part of their training. They were able to interact and network with attendees and faculty, providing an unparalleled educational experience highlighted by an elegant reception and dinner at the Harvard Faculty Club in Cambridge.

The HSPH OEMR hosted its second PHM conference on "Sleep and Shift Work: Optimizing Productivity and Health Management in the 24/7 Global Economy" on September 27 and 28, 2012. The sold-out conference was a huge success, bringing together leading experts in fields pertaining to sleep and shift work from Harvard and other universities and 58 participants representing thought leaders from across the US and 8 other countries. Co-directed by Drs. Kales, Forman, and Parks, the 16 colloquium faculty represented a diverse range of interests and expertise from industry leaders to faculty researchers. All current residents attended the colloquium and had the opportunity to network with both faculty and attendees.



[Photo: 2010 Panel Discussion with John Mackey; Eric Schultz, Harvard Pilgrim Health Care; Dr. David Wennberg, Health Dialog; and Richard Duffy, International Association of Fire Fighters.]

## A Recruiter's Perspective: Current Trends in Occupational Medicine



[Photo: Nyla Medlock, Respected OEM Physician Recruiter]

We are experiencing a paradigm shift in healthcare. The number of positions available for physicians in occupational and environmental medicine has increased immensely over the last few years. The positions available and that will come available are good positions, with executive-level responsibility, medical challenges, and an opportunity to make a difference in the lives of workers, the success of employers, and the health of communities across the country.

Over 50% of the current medical directors in corporations will retire over the next five years. In addition, many physicians are expected to leave government positions. Structural and demographic changes in health care (due not just to the Affordable Care Act) will result in a huge demand for primary care and clinical specialty medicine services. That trend will further starve the market for qualified OEM practitioners, because fewer physicians are likely to enter the field in mid-career or be able to compete with residency-trained specialists.

At the same time, the pipeline for training is so constricted and so few physicians are in OEM residency programs that there are nowhere near enough physicians to take these excellent positions. Due to the small number of OEM residency programs (less than 25 current US programs at my count), the market is gaining only about 85 residents annually, while losing about 250 OEM physicians to attrition each year.

This scenario spells one word—SHORTAGE! And the shortage is already here. Where once there were 50 positions on average listed through the American College of Occupational and Environmental Medicine at any one time, there are now 250, which now includes executive physician positions. Candidates with training of demonstrable excellence and relevance, 5-10 years corporate experience, a minimum of 5 years hands-on clinical experience, a MPH, and a MBA will be HIGHLY in demand for positions as physician executives in workplace settings for positions such as CMO, VP-Medical, Chief Health Officer, VP-HSE, Global Medical Director, and CMD.

Physicians currently doing these jobs have the functional equivalent of an MBA because they have many years of experience in the trenches of business management. As these physicians retire, a newly-certified occupational physician with an MBA will have an overwhelming advantage when applying for the most prestigious positions.

Just as important as good medical training, however, is the ability to work with people, which means interacting well with workers and managers alike. Team collaboration, individual growth, networking, and adaptability are key to having influence and becoming a leader in today's OEM world. The physician who can understand and communicate with patients, and who speaks the language of business and healthcare to managers, will be highly valued as a professional.

In closing, my advice to you is to seek out the best possible training and clinical experience, and the occupational medicine corporate world can be yours!

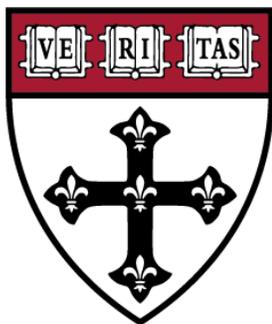
~Nyla Medlock, Respected OEM Physician Recruiter

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## OEM Has Lowest Burnout and Highest Work-Life Balance Satisfaction

A 2012 study, published in the [Archives of Internal Medicine](#), found that preventive medicine, including occupational and environmental medicine, has the lowest prevalence of physician burnout and the highest prevalence of satisfaction with work-life balance.

The researchers were interested in "evaluating rates of burnout among US physicians, exploring differences by specialty, and comparing physicians with US workers in other fields." The first such national study investigating these questions concluded that "burnout is more common among physicians than among other US workers, and physicians in specialties at the front line of care access seem to be at greatest risk." Click [here](#) for the abstract.



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