

The 2009 *OPEN MINDS* Strategic Planning Institute: Strategic Tools for Managing in Tough Times



Produced by **OPEN MINDS** and **NAATP**
National Association of Addiction Treatment Providers

May 14 – 15, 2009
PGA National Resort & Spa, Palm Beach Gardens, Florida

YOU HAVE CHALLENGES - WE HAVE ANSWERS!

This is the only two-day strategic reality check that provides behavioral health and social service executives with the latest tools and techniques to develop and implement the right strategy to prosper in an economic downturn. Learn from the experts who will share case studies of successful applications and lessons learned from the field. Get your questions answered with interactive discussions and networking opportunities scheduled throughout this two-day event. The *OPEN MINDS* senior consulting team and invited industry experts will provide you with the best practices in metrics management, strategic planning, marketing and technology to prosper now and in the future.

WHAT PREVIOUS ATTENDEES SAY:

Very informative, thorough and well-presented.

Great ideas on improving strategic planning!

Your team is an excellent resource for the most up-to-date information!

Entertaining and very engaging. Excellent hands-on information.

OPEN MINDS is the best of its kind.

WHO WILL BE THERE:

Executives & board members involved with strategic planning
Chief executive officers
Chief operating officers
Chief financial officers
Clinical managers & program directors

WHAT YOU WILL LEARN:

- Fast forward your understanding of the latest strategic planning industry trends
- Increase your knowledge about key trends affecting organizational revenue and margins
- Identify new resources that link strategic planning to organizational objectives
- Get step-by-step best practices for strategic revenue diversification
- Gather ideas for using technology to solve strategic management challenges
- Increase your understanding of how to use metrics in supervision and program management
- Learn how to re-structure operating processes to increase productivity & decrease costs
- Take away revenue maximization strategies and revenue-generating opportunities

CONTACT HOURS: 11.5

To register for the Institute, visit <http://openminds.com/educ/omi2009sp.htm> or call toll-free 877-850-6463



For hotel reservations, call PGA National Resort and Spa, 1-800-863-2819, or reserve online at <http://www.pgaresort.com/>. Reference the NAATP Annual Conference (code 1855 when reserving online), and reserve by April 16, to receive the room rate of \$179 per night for this event (daily \$20 resort fee is additional). The hotel is located at 400 Avenue of the Champions, Palm Beach Gardens, Florida.

The 2009 *OPEN MINDS* Strategic Planning Institute: Strategic Tools for Managing in Tough Times



INSTITUTE AT-A-GLANCE

Day 1, May 14, 2009	Track: Market-Driven Strategy Development	Track: Strategic Management - Making Strategic Planning a Reality
8:30 am – 9:00 am	<i>Registration Check-In & Coffee/Tea</i>	
9:00 am – 10:00 am	A Strategic Reality Check: Is Your Strategic Plan Prepared for an Economic Downturn?	
10:00 am – 10:15 am	<i>Break</i>	
10:15 a.m. – 11:45 a.m.	The Evolving Behavioral Health & Social Service Network: Key Trends Affecting Your Organizational Revenue & Margins	
11:45 – 1:00 p.m.	<i>Lunch on your own</i>	
1:00 – 2:30 p.m.	Increasing Your Organization’s Relevance in a Challenging Market: Strategies (and Successes) to Prevent Organizational Obsolescence – The Rimrock Foundation Case Study	Strategic Planning: A Structured Approach to Deploying Resources to Achieve Your Organizational Objectives
2:30 – 2:45 p.m.	<i>Break</i>	
2:45 – 4:15 p.m.	Strategic Revenue Diversification: What Are the Options & How Do You Decide What Options to Pursue?	Implementing a Successful Performance-Based Incentive System – The Utah Youth Village Case Study
4:30 pm – 6:00 pm	<i>Executive Networking Reception</i>	

The 2009 *OPEN MINDS* Strategic Planning Institute: Strategic Tools for Managing in Tough Times



Day 2, May 15, 2009	Track: Market-Driven Strategy Development	Track: Strategic Management - Making Strategic Planning a Reality
7:00 – 8:00 a.m.	<i>Morning Wake-Up Breakfast, sponsored by Rimrock Foundation</i>	
8:00 – 9:30 a.m.	Getting More From Your Current Contracts & Clients – Revenue Maximization Strategies Focused on Improved Billing & Collections	How to Make Legislative Advocacy a Key Component of Your Organization’s Strategic Plan – Signal Behavioral Health Network
9:30 – 9:45 a.m.	<i>Break</i>	
10:00 – 11:30 a.m.	How to Link Your Technology Plan to Your Strategic Plan: Using Technology to Solve Your Strategic Management Challenges	
11:30 a.m – 12:30 p.m.	<i>Lunch on your own</i>	
12:30 – 2:00 p.m.	Managing for Results – Metrics-Based Management: Using Data to Enhance Quality of Care and Operations; Tracking the Progress of Your Strategic Plan: Metrics-Based Management and Key Performance Indicators	
2:00 – 3:00 p.m.	New Revenue Showcase: 31 New Revenue-Generating Opportunities --- In Only 60 Minutes	
3:00 pm	<i>Adjourn</i>	

The 2009 *OPEN MINDS* Strategic Planning Institute: Strategic Tools for Managing in Tough Times



May 14, 2009

8:30 – 9:00 am, Day 1 – May 14

Registration

Registration Check-in/Coffee & Tea

9:00 – 10:00 am, Day 1 – May 14

Opening Plenary

A Strategic Reality Check: Is Your Strategic Plan Prepared for An Economic Downturn?

An economic downturn is an opportunity – to build fiscal solvency. This strategic check-up will give your organization diagnostic tools for achieving and maintaining viability. In these challenging economic times you want to maintain a tight focus on both generating revenue, and controlling expenses, without sacrificing the future of your organization. Join Monica Oss, founder and chief executive officer of *OPEN MINDS* as she welcomes you to the institute and discusses short-and-long-term strategies for achieving and maintaining profitability.

Thinking Strategically, Short-Term and Long-Term
Effective Cost-Cutting Without Sacrificing the Future of Your Organization
Revenue Diversification and Maximization Strategies to Start Now
Investing in Innovations and Technology to Reduce Costs and Improve Quality

Faculty: Monica E. Oss, Chief Executive Officer, *OPEN MINDS*

10:00 am – 10:15 am, Day 1 – May 14

Break

10:15 am – 11:45 am, Day 1 – May 14

Plenary Address

The Evolving Behavioral Health & Social Service Network: Key Trends Affecting Your Organizational Revenue and Margins

When it comes to the financing and delivery of behavioral health and social services, we are in the midst of a “perfect storm.” On the one hand, cost pressures and financing policy are pushing integration and risk-based contracting. On the other, a flood of new technologies – from wireless data collection tools to personal health records to neurotech treatments – are entering the market. Combined with changing payer contracting models, these new technologies can represent a threat or an opportunity – depending on whether or not you have the right people and the right infrastructure. Join *OPEN MINDS* chief executive officer, Monica E. Oss for a look at these key trends and the implications for organizational revenue and margins.

An Executive Update on Trends in Policy, Financing, & Technologies Shaping the Planning Process
What Payers & Consumers Want - Or So They Say ...
Developing Strategy in the Midst of the Perfect Storm

Faculty: Monica E. Oss, Chief Executive Officer, *OPEN MINDS*

11:45 am – 1:00 pm, Day 1 – May 14

Lunch on your own

The 2009 *OPEN MINDS* Strategic Planning Institute: Strategic Tools for Managing in Tough Times



1:00 pm – 2:30 pm, Day 1 – May 14

Market-Driven Strategy Development

Increasing Your Organization's Relevance in a Challenging Market: Strategies (and Successes) to Prevent Organizational Obsolescence - The Rimrock Foundation Case Study

The executive teams of many behavioral health organizations pride themselves on being "unique". Too often, this sense of 'uniqueness' translates into an inability to use innovations from other industries or get economies of scale from innovative developments outside of their organization. In a fast-moving highly competitive environment, this uniqueness can often be terminal, limiting innovation in the organization only to those that are 'developed here'. In this session, learn how to differentiate 'uniqueness' that is due to truly unique customer and market requirements, from those perceptions of uniqueness that are due to the anecdotal observations of the executive team. In this informative case study you will learn about a successful adoption of an 'out-of-industry' management practice and successful approaches to increase your organizational relevance in a challenging market.

Strategic Success, The Role Of Innovation & The Problem Of Terminal Uniqueness

Options For Adopting Innovation That Was 'Not Developed Here' - How & When To Adopt 'Out of Industry' Innovation

Using a Social Enterprise Model To Increase Your Organization's Relevance in A Challenging Market: The Rimrock Foundation Case Study

Faculty:

Mona L. Sumner, M.A.C., M.H.A., Chief Operations Officer & Clinical Director, Rimrock Foundation

Monica E. Oss, Chief Executive Officer, *OPEN MINDS*

1:00 pm – 2:30 pm, Day 1 – May 14

Strategic Management: Making Strategic Planning a Reality

Strategic Planning: A Structured Approach to Deploying Resources to Achieve Your Organizational Objectives

If you don't know where your business is going, any road will get you there. Are you willing to take the risk that you wind up on the wrong road? This session will provide you with a strategic planning "roadmap" that outlines the steps to successful strategic planning and implementation. Participants will also be introduced to a structured approach for linking strategy to operation within their own organizations.

Why Organizations Need an Externally-Focused, Resource-Based Approach to Strategic Planning

Steps in Developing a Sure-to-be-implemented Organizational Strategy to Achieve Your Organizational Objectives

From Plan to Implementation: Tips for Linking Strategic Planning to Operations

Faculty: Dee Brown, M.S.M., Senior Associate, *OPEN MINDS*

2:30 pm – 2:45 pm, Day 1 – May 14

Break in Exhibit Hall

The 2009 *OPEN MINDS* Strategic Planning Institute: Strategic Tools for Managing in Tough Times



2:45 pm – 4:15 pm, Day 1 – May 14

Strategic Management: Making Strategic Planning a Reality

Implementing a Successful Performance-Based Incentive System – The Utah Youth Village Case Study

When used correctly, performance evaluations and performance-based bonuses can create a positive organizational culture and enable an executive team to manage more effectively. Utah Youth Village, a private non-profit provider of residential treatment for children, has been utilizing 360-degree performance-based evaluations for many years, for all employees, from the front-line staff to the chief executive officer. In addition, therapists, social workers and the front-line staff have the opportunity to earn bonuses based on performance measures. Learn how Utah Youth Village structures these performance evaluations and performance-based bonuses to create an organizational culture that thrives on feedback and stays focused on its mission, and its customers.

Creating a 360-Degree Performance Evaluation for All Employees
Structuring A Performance-Based Bonus Incentive Across the Organization
Evaluating Progress and Improving Performance

Faculty:

Eric W. Bjorklund, President & CEO, Utah Youth Village
Dee Brown, M.S.M., Senior Associate, *OPEN MINDS*

2:45 pm – 4:15 pm, Day 1 – May 14

Market-Driven Strategy Development

Strategic Revenue Diversification: What are the Options and How Do You Decide What Options to Pursue?

Many behavioral health and social service organizations are struggling with their payer mix, either due to concerns about being too reliant on one payer source, or wanting to achieve a financially healthy balance between those payer sources that cover the cost of care with those that do not. The unfortunate reality is that for a large number of organizations, efforts to diversify payer sources and develop new programs with a positive margin are not successful. Your decision-making process about revenue diversification should be completely grounded in your strategy. An effective strategic plan should address your overall organizational mission, vision, and positioning; which markets and customers to pursue; what service lines to offer; and the revenue and return needed for each service line.

Conducting an External Market Analysis
Analyzing Your Current Service Lines
Determining Strategic Options for Diversification

Faculty: Joseph P. Naughton-Travers, Ed.M., Senior Associate, *OPEN MINDS*

4:30 – 6:00 pm, Day 1 – May 14

Executive Networking Reception in Exhibit Hall

The 2009 *OPEN MINDS* Strategic Planning Institute: Strategic Tools for Managing in Tough Times



May 15, 2009

7:00 – 8:00 am, Day 2 – May 15

Networking in Exhibit Hall

Morning Wake-Up Breakfast, sponsored by Rimrock Foundation

8:00 am – 9:30 am, Day 2 – May 15

Strategic Management: Making Strategic Planning a Reality

How to Make Legislative Advocacy a Key Component of Your Organization's Strategic Plan – Signal Behavioral Health Network

Is lobbying a critical part of your strategic plan? Do you know what legislative actions are currently pending that may affect your organization? Do you know who the key legislators are in your state? This informative session will give you everything you need to know to be informed about, and have influence on, legislative activities that affect your organization and field. Learn how Mr. Wendt makes legislative advocacy a key part of his leadership role as chief executive officer and general counsel at Signal Behavioral Health Network. Hear the legislative point of view from Dr. Johnson, an experienced legislator who has served in the Colorado Senate and House of Representatives and currently serves as a County Commissioner. Join us as they share the dos and don'ts for getting to know your legislators, and having input on legislative activities, as well as guidelines for making lobbying a key part of your strategic plan.

Why Lobbying Should be a Key Part of Your Strategic Plan

Selecting and Working with a Lobbyist

Building Relationships with Key Legislators

Limitations and Restrictions on Lobbying Activities

Faculty:

Bill Wendt, JD, CACIII, Chief Executive Officer/General Counsel, Signal Behavioral Health Network

Steve Johnson, D.V.M., Larimer County (Colorado) County Commissioner, former member of the Colorado Senate and House of Representatives

Dee Brown, M.S.M., Senior Associate, *OPEN MINDS*

8:00 am – 9:30 am, Day 2 – May 15

Market-Driven Strategy Development

Getting More From Your Current Contracts & Clients – Revenue Maximization Strategies Focused on Improved Billing & Collections

In today's behavioral health and social service market, most provider organizations are struggling with both how to decrease expenses and to increase the financial resources that are available for program development and service delivery. One often overlooked way to accomplish this is to improve the collection rate for the services that are rendered. It is not uncommon for organizations in our field to have collection rates of only 80% (effectively a bad debt ratio of 20%), meaning that an organization with \$1 million in annual revenues is losing \$200,000 to bad debt expenses. Even a small improvement in back office collections can have a positive financial impact. In this session, we will guide you to better accounts receivable (A/R) practices by looking at several areas key to successful collection.

- The Flow of Billing Information
- Successful Collection with the ABCs: Admissions, Billing, and Collection
- Accounts Receivable Management and Performance Measurement.

Faculty: Joseph P. Naughton-Travers, Senior Associate, *OPEN MINDS*

9:30 – 9:45 am, Day 2 – May 15

Break in Exhibit Hall



The 2009 *OPEN MINDS* Strategic Planning Institute: Strategic Tools for Managing in Tough Times



Produced by



10:00 - 11:30 am, Day 2 – May 15

Plenary Presentation

How to Link Your Technology Plan to Your Strategic Plan: Using Technology to Solve Your Strategic Management Challenges

Technology is too strategic to leave it to the techies. Technology planning needs to be an integral part of your strategic planning (and budgeting) process. This session provides an overview of the strategic planning process and where technology fits. Session leader Joe Naughton-Travers will lead you through the steps in the technology planning process and wrap up the session with some case examples of technology planning.

Linking Strategic Plan to Technology Plan: A Best Practice Model

Steps in the Technology Planning Process

Lessons Learned From the Implementation of New Information Infrastructure

Faculty: Joseph P. Naughton-Travers, Senior Associate, *OPEN MINDS*

11:30 am – 12:30 pm, Day 2 – May 15

Lunch on your own

12:30 – 2:00 pm, Day 2 – May 15

Plenary Presentation

Managing for Results - Metrics-Based Management: Using Data to Enhance Quality of Care and Operations; Tracking the Progress of Your Strategic Plan: Metrics-Based Management and Key Performance Indicators

The role of leaders is to facilitate change. But too often change initiatives are not anchored in organizational performance data and often doomed to fail. If used correctly, measurement data can help an executive team better lead its organization and can help direct the organization toward positive change. Most organizations have the data they need to support metrics-based management in their current information systems – but they don't know how to organize the information. During this presentation, you will be introduced to the benefits of management metrics and how to obtain them from your current system.

How to Use Management Metrics in Supervision & Program Management

Steps in Designing Management Metrics Report – Assessing & Deploying Metrics in Your Current System

Examples of Reporting Used for Metrics-Based Management

Faculty: Joseph P. Naughton-Travers, Ed.M., Senior Associate, *OPEN MINDS*

2:00 – 3:00 pm, Day 2 – May 15

Closing Plenary

New Revenue Showcase: 31 New Revenue-Generating Opportunities ---- In Only 60 Minutes

You won't want to miss this fast-paced closing session featuring the best revenue-generating ideas, gathered by the *OPEN MINDS* team, over the past year. Many behavioral health and social service organizations are grappling with how best to meet the needs of their clients and consumers while also facing the ever-present challenges of fiscal responsibility. Learn how to adjust your strategy and diversify your revenue sources with 31 ideas in an hour!

- Expanding Your Consumer Base
- Developing a New Market Niche
- Creating New Programs

Faculty: Monica E. Oss, Chief Executive Officer, *OPEN MINDS*

3:00 pm, Day 2 – May 15

Adjourn

The 2009 *OPEN MINDS* Strategic Planning Institute: Strategic Tools for Managing in Tough Times

Produced by  **OPEN MINDS** and  **NAATP**
National Association of Addiction Treatment Providers

THE 2009 STRATEGIC PLANNING INSTITUTE IS SPONSORED BY:



The 2009 *OPEN MINDS* Strategic Planning Institute:
Strategic Tools for Managing in Tough Times



Produced by

OPEN
MINDS



National Association of Addiction Treatment Providers

INSTITUTE REGISTRATION FORM

Name: _____ Title: _____

Organization: _____

Address: _____

City: _____ State: _____ Zip: _____

Phone: _____ Fax: _____

E-Mail: _____ Please add me to your FREE Industry Updates E-mail list.

REGISTRATION:

- Super Saver registration fee (by February 15, 2009) \$495
- Early-Bird registration fee (by April 3, 2009)..... \$695
- Regular Registration fee \$795

METHOD OF PAYMENT:

- Check (payable to *OPEN MINDS*)
- Charge my: VISA MasterCard AMEX Discover

Card Number: _____ Expiration Date: _____

Cardholder's Printed Name: _____

Cardholder's Signature: _____

GROUP DISCOUNTS:

Group rates are available through *OPEN MINDS*. Contact *OPEN MINDS* toll-free at 877-350-6463 or e-mail openminds@openminds.com for more information or to request a copy of a brochure. Visit our web site for complete details: www.openminds.com/educ/groupregistration.htm

REGISTRATION GUIDELINES:

Requests for refunds must be received in writing at least 30 days prior to the event and are subject to an administrative charge of \$50. No refund will be made less than 30 days prior to the event. Substitute enrollment for another *OPEN MINDS* event on another date will be accepted for an administrative fee of \$25, plus the difference in registration fees. An alternate individual, at the same event, will be accepted for a \$25 administrative fee.

RETURN TO: *OPEN MINDS*, 163 York Street, Gettysburg, PA 17325-1933

PHONE TOLL-FREE: 877-350-6463, PHONE: 717-334-1329, FAX: 717-334-0538

WEB SITE: www.openminds.com, E-MAIL: openminds@openminds.com