



# The 2010 *OPEN MINDS* Strategic Planning Institute: Strategic Tools for Managing in Tough Times

May 20 - 21, 2010

The Westin La Cantera Resort, San Antonio, Texas

## 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

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

- 2007 Institute Attendee

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.

### WHO WILL BE THERE:

- Executives and board members
- Chief executive officers
- Chief operating officers
- Chief financial officers
- Clinical managers and program directors

“Entertaining and very engaging. Excellent hands-on information. *OPEN MINDS* is the best of its kind.”

- 2008 Institute Attendee

“This was very informative, *OPEN MINDS* is an excellent resource for new ideas. “

- 2009 Institute Attendee

### 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



To register for the Institute, visit <http://openminds.com/educ/omi2010sp.htm> or call toll-free 877-850-6463

**For hotel reservations**, call The Westin La Cantera Resort, (210) 558-6500 and reference the NAATP Annual Conference. The hotel is located at 16641 La Cantera Parkway, San Antonio, TX 78256 .



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## INSTITUTE AT-A-GLANCE

Day 1, May 20, 2010	Development	
8:30 am – 9:00 am	<i>Registration Check-In &amp; Coffee/Tea</i>	
9:00 am – 10:00 am	<b>A Strategic Reality Check: Is Your Strategic Plan Prepared for an Economic Downturn?</b>	
10:00 a.m. – 11:30 a.m.	<b>Key Trends in the Behavioral Health &amp; Social Service Field Driving Revenue &amp; Margins – Now &amp; In the Future</b>	
11:30 – 1:00 p.m.	<i>Lunch on your own</i>	
1:00 – 2:30 p.m.	<b>Strategic Planning: A Structured Approach to Deploying Resources to Achieve Your Organizational Objectives</b>	
2:30 – 2:45 p.m.	<i>Break</i>	
2:45 – 4:15 p.m.	<b>Strategic Revenue Diversification: What Are the Options &amp; How Do You Decide What Options to Pursue?</b>	
4:15 pm – 5:45 pm	<i>Executive Networking Reception</i>	



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## INSTITUTE AT-A-GLANCE (*CONT.*)

Day 2, May 21, 2010		
7:00 – 8:00 a.m.	<i>Continental Breakfast</i>	
8:00 – 9:30 a.m.	<b>Getting More From Your Current Contracts &amp; Clients – Revenue Maximization Strategies Focused on Improved Billing &amp; Collections</b>	
9:30 – 9:45 a.m.	<i>Break</i>	
9:45 – 11:15 a.m.	<b>How to Link Your Technology Plan to Your Strategic Plan: Using Technology to Solve Your Strategic Management Challenges</b>	
11:15 am. – 12:30 p.m.	<i>Lunch on your own</i>	
12:30 – 2:00 p.m.	<b>Metrics-Based Management: Using Data to Enhance Operations and Track the Progress of Your Strategic Plan</b>	
2:00 – 3:00 p.m.	<b>New Revenue Showcase: 31 New Revenue-Generating Opportunities --- In Only 60 Minutes</b>	
3:00 pm	<i>Adjourn</i>	

# The 2010 *OPEN MINDS* Strategic Planning Institute: Strategic Tools for Managing in Tough Times



8:30 – 9:00 am, Day 1 – May 20

Registration

**Registration Check-in/Coffee & Tea**

9:00 – 10:00 am, Day 1 – May 20

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.

- Planning (& Managing) In Harsh Economic Times
- Cash Management Considerations
- Finding Business Opportunities in An Economic Downturn
- Preparing for a Post-Recession Marketplace

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

10:00 am – 11:30 am, Day 1 – May 20

Plenary Address

## **Key Trends in the Behavioral Health and Social Service Field Driving Revenue & Margins – Now & In the Future**

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
- The Forces of Evolution & Innovation in the Field – the Possible Post-Recession Market Scenarios
- Preparing for the Post-Recession Market

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

11:30 am – 1:00 pm, Day 1 – May 20

Lunch on your own

# The 2010 *OPEN MINDS* Strategic Planning Institute: Strategic Tools for Managing in Tough Times

1:00 pm – 2:30 pm, Day 1 – May 20

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

2:30 pm – 2:45 pm, Day 1 – May 20

Break in Exhibit Area

Room –

2:45 pm – 4:15 pm, Day 1 – May 20

Strategic Management: Making Strategic Planning a Reality

## **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*

4:15 – 5:45 p.m. Day 1 – May 20

Executive Networking Reception in Exhibit Area

# The 2010 *OPEN MINDS* Strategic Planning Institute: Strategic Tools for Managing in Tough Times



7:00 – 8:00 am, Day 2 – May 21

Networking in Exhibit Area

## **Continental Breakfast**

8:00 am – 9:30 am, Day 2 – May 21

Strategic Management: Making Strategic Planning a Reality

### **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 21

Break in Exhibit Area

9:45 – 11:15 am, Day 2 – May 21

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*

11:15 am – 12:30 pm, Day 2 – May 21

Lunch on your own

# The 2010 *OPEN MINDS* Strategic Planning Institute: Strategic Tools for Managing in Tough Times

12:30 – 2:00 pm, Day 2 – May 21

Plenary Presentation

## **Metrics-Based Management: Using Data to Enhance Operations and Track the Progress of Your Strategic Plan**

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 21

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 21

Adjourn

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Strategic Tools for Managing in Tough Times**

**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 20, 2010) ..... \$495
- Early-Bird registration fee (by April 20, 2010)..... \$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: \_\_\_\_\_

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**GROUP DISCOUNTS:**

Group rates are available through *OPEN MINDS*. Contact *OPEN MINDS* toll-free at 877-350-6463 or e-mail [openminds@openminds.com](mailto: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](http://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  
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