



Executive & Management Education Programs
for the Health & Human Service Field

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OPEN MINDS Management & Executive Education Programs

OPEN MINDS Management & Executive Education Seminars provide the market intelligence and best practice management ‘jump start’ that every executive team needs to capitalize on new opportunities in a changing economy. Participants gain a broader vision of success — equipped to make the tough decisions required to manage through the downturn and position their organizations for growth and profitability.

OPEN MINDS Management and Executive Education Programs are focused on five key areas of management competency:

Management Domain	Executive Competency
Leadership & Governance	Board composition and board performance management
	Board meeting and governance management
	Executive team composition, performance management, and succession planning
Financial Management	Budgeting and financial management
	Financial risk management
	Long-term financing and capital planning
Marketing & Innovation	Government, regulatory, and legislative relations
	Communications, public relations, and media management
	Marketing planning, strategic alliances, and community collaborations
	Service line development
Technology & Information Management	Organizational performance metrics management
	Information management infrastructure
Strategic Management	Strategic planning and leadership of organizational evolution
	Service line management and corporate compliance
	Talent management

The *OPEN MINDS* management and executive education programs cover six key domains – the five core management competency areas and industry market intelligence briefings. These six domains are described briefly below. The seminars and web briefings available in each domain are listed in the sections that follow.

Financial Management The Financial Management Seminars provide cutting-edge financial management models and financial risk management techniques.

Technology & Information Management The Information Technology Seminars specialize in assisting behavioral health and social service organizations to fully benefit from technology investments including choosing technology applications and vendors best suited to the organization’s requirements and overcoming cultural resistance to adopting technology.

Leadership & Governance The Leadership & Governance Seminars provide effective planning to boards of for-profit, not-for-profit, and government agencies. These sessions address the constantly changing landscape with the development of board briefing sessions, facilitation of planning initiatives, and organizational and board development.



Marketing & Innovation The Marketing and Development Seminars provide behavioral health and social service organizations with the strategies to rapidly analyze and successfully respond to changing market conditions.

Strategic Management The Strategic Planning & Management Seminars set the foundation for critical planning and decision making throughout the organization including Operations and Business Process Management, Human Resource Management, and Public Agency Program Design and Operations Management.

***OPEN MINDS* Next Generation Market Intelligence Updates** In addition to competency-building management programs, the *OPEN MINDS* team also provides executive teams and boards of directors with up-to-the-minute updates on key industry trends and their implications for planning. These sessions always include the latest developments in the field – updated by the full-time industry research staff at *OPEN MINDS*.



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I. OPEN MINDS Next Generation Market Intelligence Update Seminars

The Evolving Behavioral Health Market Space: A Look at Emerging Successful Service Models

This seminar brings contemporary market knowledge for you and your executive group. The seminar is focused on:

- Current patterns and trends in behavioral health spending and utilization
- Key market developments shaping the behavioral health market space
- The emerging behavioral health market model and successful service models

An Executive Update on the Public Mental Health System

The traditional “public mental health system” is no longer traditional. A combination of federal regulation and legislation, shifts in financing, and new science and technology have dramatically changed the landscape. This executive seminar provides participants with both a snapshot of the current system – and the trends that are shaping the future.

- ♦ Defining the Public Mental Health System: The Consumer Population, the Servicing, & the Delivery System
- ♦ Financing Shapes the System: An Overview of Current Spending & Spending Trends
- ♦ The Shifting Consumer Service System: Treatment Settings & Influences
- ♦ Key Trends Shaping the Future of Public Mental Health

An Executive Update of U.S. Financing of Health & Human Services: Past, Present, & Future

Seminar Agenda:

- ♦ *A Look at Federal Funding and Trends Impacting Organizational Strategy & Operations in the Health and Human Services Field*
- ♦ *CMS Policy Changes Bring New Challenges for Medicare & Medicaid*
- ♦ *Beyond CMS Changes in Other Federal Funding Sources & the Bottom Line*
- ♦ *The Challenges of State & County Strategies to Enhance Funding*
- ♦ *Understanding the Implications of These Changes for Your Organization*

The financial system for health and human services is complex and continually evolving. Several changes at the Federal level are resulting in significant financial impacts for behavioral health and social service providers. In addition, the Deficit Reduction Act of 2007 brought changes to Medicaid spending and related rules. For states, systems are evolving in different directions. This seminar provides an update on the changing Federal funding landscape and the challenges for leaders in terms of both strategy and operations.

The Changing Federal Funding Landscape & Its Implication for the Behavioral Health & Social Service Field

Seminar Agenda:

- ◆ *A Look at Federal Funding Sources in Behavioral Health & Social Services: A Snapshot of Trends in Funding in the Field*
- ◆ *CMS Policy Changes Bring New Challenges for Medicare & Medicaid*
- ◆ *Beyond CMS Changes in Other Federal Funding Sources & the Bottom Line*
- ◆ *The Challenges of State & County Strategies to Enhance Funding*
- ◆ *Understanding the Implications of These Changes for Your Organization*

Several changes at the Federal level are resulting in significant financial impacts for behavioral health and social service providers. In addition, the Deficit Reduction Act of 2007 brought changes to Medicaid spending and related rules. For states, systems are evolving in different directions. The combination of budget deficits and the changes in Medicaid reimbursement at the Federal level have had their effects, making Medicaid the second largest expense after education. As a result, states are increasing their use of privatization, competitive bidding, and managed care to contain costs. This seminar provides an update on the changing Federal funding landscape and guidelines for assessing the financial impact of the proposed changes.

Planning for the Next Generation of Behavioral Health & Social Services: A Futures Briefing

Seminar Agenda:

- ◆ *The Futurists Predictions*
- ◆ *Snapshot of the Landscape: Industry Metrics*
- ◆ *Key Trends Shaping Change in the Behavioral Health & Social Service Sector*
- ◆ *Market Dynamics at Work: An Exercise for Executives*
- ◆ *Current Implications of the Changing Market*

Is your organization prepared to deliver services in the emerging behavioral health and social services market? The *OPEN MINDS* Next Generation Briefing can help you answer that question. The briefing is structured on the trends and statistics in the field that will shape what the "next generation" organization will need to look like. Developed by the *OPEN MINDS* team, the briefing features up-to-the-minute information, industry forecasts, and in-depth research analyses. The question-and-answer session wrapping up the briefing can be used to cover any areas that you want to delve into - or to explore new areas of interest. The *OPEN MINDS* Next Generation Briefing includes: Overview of the field from a service delivery and financial view, with a historical perspective.

*The information in the
OPEN MINDS
presentations was
awesome!
- 2008 Seminar Attendee*



The Ambient Assisted Living Services Market: The Next Generation in Services for the Mature Adult Market

Seminar Agenda:

- ♦ *An Overview of the Market Trends Shaping the Changing Service System for an Aging Population*
- ♦ *The Implication of the Current Market Trends*
- ♦ *Understandign the Ambient Assisted Living Market*
- ♦ *Preparing for the Shift in Models*

There is lots of discussion of the aging of the US population and the increase in the longevity of populations worldwide. Many health and human service provider organizations are looking to the 'mature' adult market (defined as 55+) for revenue growth and diversification. But, many of these organizations are investing in services that are dated the day they are launched – because they are based on a previous paradigm in service delivery.

The traditional concepts of 'senior services' are rapidly being replaced by a new model – the ambient assisted living model. Ambient Assisted Living fosters the provision of services and technology for the independent or more autonomous living of persons with disabilities and mature persons, via the seamless integration of support services and info-communication technologies within homes and residences, thus increasing quality of life and autonomy and reducing the need for being institutionalized or aiding it when it happens. The technologies applied for AAL are user-centric, i.e. oriented towards the needs and capabilities of the actual user. They are also integrated into the immediate personal environment of the user. As a consequence, the technology is adapting to the user rather than the other way around. In order to share relevant information between systems and services, technologies for AAL should ideally be based on modular and interoperable concepts. This would also support a 'virtual intelligence' of AAL environment. However, this capacity is not absolutely required. The customers for AAL services are a homogeneous group. They include young and healthy individuals, who are mainly interested in 'lifestyle functionalities' in order to improve their individual quality of life. On the other hand, they may include individuals suffering from multiple illnesses, who are interested in maintaining a self-determined life at home.

An Executive Briefing on Trends in Managed Behavioral Health Programs

Seminar Agenda:

- ♦ *Managed Behavioral Health in the United States Health Care System*
- ♦ *Update on Major Models & Players in the Managed Behavioral Health Sector*
- ♦ *Managed Behavioral Health Program Functionality*
- ♦ *Behavioral Health Financing in Managed Behavioral Health Programs*

The behavioral health market space is in a constant state of change. Join us for an update trends throughout the industry. This seminar will present an overview of behavioral health spending, managed behavioral health program models and the metrics they use, and a review of current and future legislation and regulations that impact the managed behavioral health system. The *OPEN MINDS* team provides information about the managed behavioral health service continuum, provider network structure, consumers assessment and treatment planning, quality management, and the role of specialty service locations. This seminar provides comprehensive information about financing models and the types of risk relationships that exist in the managed behavioral health system.



II. *OPEN MINDS* Next Generation Market Intelligence Update Web Briefings

1. The Impacts & Implications of the Recession on State & Local Budgets
The recession continues to have a tremendous impact on state and local budgets. Join us to learn the latest trends in how state and local governments are reacting to the budget crisis, and what these mean for behavioral health and social service care delivery organizations.
2. Everything You Want to Know About What Is Happening in Washington, D.C., But Were Afraid to Ask - The Effects on the Field of the Stimulus Package
The American Recovery and Reinvestment Act (ARRA) was signed into law on February 17, 2009, with an overall budget of \$787 billion. Health care is one of the largest spending areas - over \$150 billion - but how these funds will be allocated is still being determined. Join us for the latest update on the implications of the Stimulus Package for behavioral health.
3. Everything You Want to Know About What Is Happening in Washington, D.C., But Were Afraid to Ask - The Effects on the Field of the Parity Legislation
The Mental Health Parity and Addiction Equity Act of 2008 will have significant short and long term effects on consumers, payers, and behavioral health payer systems. Join us for the most current update on the parity legislation, and the implications for the field.
4. The Good, The Bad, & The Ugly: How New Medicaid Rules Affect Your Service Delivery
Medicaid is an increasingly large component of behavioral health spending, and additional Medicaid spending accounts for 60% of the stimulus funding for health care. Understanding the most current Medicaid rules and recommendations is critical for all behavioral health organizations.
5. The New Technology & Your Consumers: An Update on Emerging Technologies & Their Effect On Competition in the Behavioral Health & Social Service Market Space
Emerging technologies are not only giving behavioral health providers more efficient tools to manage their organizations, but are creating new ways to deliver treatment. These new technologies, coupled with an era of growing consumer choice, are fundamentally changing the competitive marketplace.
6. Emerging Market Models for Behavioral Health & Social Services - The Financial & Technology Implications You Should Plan For
New technologies are driving fundamental changes in service delivery models. Cost pressures and financial policy are resulting in integration and risk-based contracting. What are the emerging market models? Join us for a discussion of the three rules governing emerging markets, a look at emerging market models for behavioral health, child welfare and developmental disabilities and the five strategic questions care delivery organizations should be considering.
7. A Look at Federal Funding Sources in Behavioral Health & Social Services –
A Snapshot of Trends in Funding in the Field
Join us for a session that will look at public and private payers and sources of payment for health and human services; the management organizations and programs employed by payers to manage their funds; and the consumer service context, including modalities/locations of care, clinical treatment models, technology, and support service delivery.
8. Technology as the Next Disruptive Innovation in Behavioral Health: How Consumerism & Technology Will Define Our Future Market Model in the Decade Ahead
This session will provide an overview of the emerging technologies in our sector and look at how these disruptive innovations create both changing consumer service demand and an “offshored” market effect in most markets. The session will focus on the changing role of the consumer and the strategy issues ahead for management teams in behavioral health provider organizations.

9. The New Financing & Customer Dynamics in the Behavioral Health & Social Service Field:
Drivers of Future Organizational Strategy
To grow and thrive in an ever-challenging business climate, leaders need great ideas they can use today. This web briefing will focus on the leadership skills and ideas needed to succeed. Understanding the market and the changes needed is a critical first step for leaders. Join us for an executive briefing on dynamic industry change drivers and the infrastructure and talent necessary to keep pace with the industry.
10. Emerging Market Models for Behavioral Health & Human Service Care Delivery Organizations –
Post-Recession Market Models & Their Management Implications
Few executive teams consciously adopt an organizational policy of isolationism, however, the demands of managing daily operations can result in an internally focused management style that fails to recognize external conditions until the financial equivalent of the next ice age is at hand. Failure to recognize and rapidly adapt to change can jeopardize the survival of an organization in a number of ways. Failure to understand demographic and economic trends can result in missed opportunities to expand into new markets and lines of business. Failure to identify and adopt new technologies can result in missed opportunities to reduce costs and improve services. Join us as we examine the trends having the greatest impact on - and presenting the greatest opportunities for - behavioral health and social service organizations.
11. Industry Trends in Performance-Based Contracting
Join us for a look at why performance-based contracting is a significant trend and its impact on private provider organizations. The session will also examine how performance-based contracting affects public sector payers.
12. The Current & Future Industry Trends for Children's Services
This session will examine the change in funding streams, the shift from process outcomes to performance-based outcomes, and the impact on the provider community drives the need for integration through collaboration.
13. 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 us for a look at these key trends and the implications for organizational revenue and margins.

III. Financial Management Seminars

Budgeting for Clinical Managers & Supervisors

Seminar Agenda:

- ♦ *The Growing Importance of Budget Development in the Current Financial Environment*
- ♦ *Components of the Budgeting Process*
- ♦ *Technology Tools for Budgeting Development*
- ♦ *We Have the Numbers - Now What? Keys to Successful Budget Management*

What is "best practice" in budgeting? How do I use my budget as a management tool? This practical seminar teaches you the basics of budget management and is a 'boot camp' on types of budgets, budget methodologies, and technology tools for budgeting. This is the only budgeting and budget management seminar developed specifically for community-based health and human service organizations.

Developing Disease Management Programs: Using Population-Based Management Strategies to Create New Market Opportunities

Seminar Agenda:

- ♦ *Current State of Application of Population-Based Management Tools & Disease Management Models*
- ♦ *The Six Components of Effective Disease Management*
- ♦ *Disease Management Case Studies: A Look at the Structure, Operation & Financing of Disease Management Programs*
- ♦ *From Theory to Action: Implementing a Population-Based Management Program*

How do I use modeling to manage the clinical resources available to people in my community? How do I decide if disease management programs are a new market opportunity for my organization? In an era of tight budgets and increasing needs, payer and provider organization executives are using new population-based modeling tools to better understand clinical costs and identify specific health interventions. One popular strategy that is emerging is the use of disease management programs; however, disease management is a complicated undertaking. If you're with a care management program, how do you best put population-based modeling to work? If you're with a service provider organization, how do you decide if disease management programs are a possible revenue source? Spend a day learning population-based management principles and understand how to determine if, and which, disease management programs make sense for your organization.

Maintaining (& Increasing) Your Organization's Profitability: A Structured Approach to Diagnosing Your Organization's revenue & Margin Challenges

Seminar Agenda:

- ♦ *The Evolving Treatment Foster Care World: Trends Affecting Organizational Revenue & Margins*
- ♦ *Assessing Your Yield on Current Contracts & Developing Revenue Maximization Strategies*
- ♦ *Improving Your Organizations Profitability through Analysis of Service Line & Contract Metrics*
- ♦ *Strategic Revenue Diversification: What Are the Options & How Do You Decide What Options to Pursue?*

Shrinking profit margins seem to be a common trend among behavioral health provider organizations. The questions for management teams is why are margins shrinking - and what should be done about it? Join us for a day with the *OPEN MINDS* consulting team to examine the common management situations contributing to declining contract and organizational profitability - and common solutions. The seminar will look at contract revenue maximization, service line and contract profitability management, and organizational revenue diversification from a strategic and tactical perspective. This intensive one-day seminar will combine a didactic presentation, case examples, and participant discussion of this critical management issue.

Extremely helpful and yet practical for supervisors; information presented was very relevant to the mental health field.

- 2008 Seminar Attendee

Using Return-On-Investment Analysis as a Tool for Strategic Decision Making: Assessing & Planning for Technology & Capital Projects

Seminar Agenda:

- ♦ *Return-On-Investment (ROI) Methodologies & Their Application*
- ♦ *ROI Components: Assessing Quantitative & Qualitative Factors Affecting Your Return*
- ♦ *Using ROI Analysis for Prioritizing Capital Projects*
- ♦ *Using ROI in the Planning & Budgeting Process*

We have a limited budget - how do I decide how much to spend on technology investments, improvements to our properties, and other capital projects? Learn how to use return-on-investment analysis models to answer these questions and more at this information-packed seminar. The only workshop of its kind in the field, this intense seminar gives you not only a strategic framework for technology acquisition, but also hands-on analytical tools. This is a "crash course" in traditional return on investment (ROI) methodologies, net present value, intangible value, and payback periods, which can be immediately applied to either a technology or capital acquisition.

Using Target Costing Models to Solve Your Pricing & Cost Management Problems

Seminar Agenda:

- ♦ *Service Line Analysis as a Tool for Understanding Service Profitability*
- ♦ *Using a Target Cost Model to Understand, Manage & Improve Your Unit Cost Process & Productivity Management*
- ♦ *The Role of Information Technology (IT) in Managing Service Costs*
- ♦ *Target Costing, Value Engineering & Case Rate Development: An Interactive Modeling Tool*

How much should we change for a service? How do I re-design my operations to respond to falling prices? What are the best practices in target costing, case rate development, and unit cost management? If you ask yourself any of these questions, this intense one-day seminar is for you. You will be exposed to different models and best practices in target costing, activity-based cost management, and value engineering, and work through case studies of actual financial scenarios.

IV. Financial Management Web Briefings

- 1. Best Practice Models For Unit Costing: Managing & Reducing The Cost Of Service Delivery**
How much does it really cost to provide a particular service or program, and how does the cost per unit of service compare to revenue received? More importantly, how do you improve processes to reduce your unit costs? Success for behavioral health and social service organizations is increasingly dependent on the ability to provide quality services at the lowest possible cost. Unit costing is a proven and effective methodology for determining the unit costs for each of the services you provide.
- 2. The Budget Benefits of the Recovery Model: Understanding the Return-On-Investment of Consumer Recovery**
Consumers are pushing for mental health system redesign that supports the recovery models. This session improves the understanding of the models for assessing the return-on-investment (ROI) to state and local governments and local systems of care of supporting the recovery model, and open access, in the public mental health system.
- 3. The Challenges & Opportunities of Performance-Based Contracting**
Performance-based contracting is becoming the norm for both behavioral health and human service organizations. These contracts can present both opportunities and threats for provider organizations. Join us to learn the practical “do’s and don’ts” for success in pay-for-performance contracting.
- 4. Estimating & Achieving a Positive ROI from EHR Adoption: The *OPEN MINDS* EHR ROI Model**
How much should you spend on technology? This is a common and difficult question for many organizations. The answer: it depends upon your projected return on investment (ROI). This session will present you with a practical ROI tool that you can use in budgeting for your technology investments.
- 5. The Evolving Treatment Foster Care World: Trends Affecting Your Organizational Revenue & Margins**
This session discusses the trends in the behavioral health field that contribute to declining margins and organizational profitability, and introduces best practice solutions for maintaining profitability.
- 6. Executive Briefing on Tax Exempt vs. Non-Profit Issues**
A Minnesota Supreme Court ruling recently stated that Federal tax-exempt status as a public charity does not necessarily translate into exemption from state property taxes. While this may appear to be an isolated matter — one child care provider, one state, and only property taxes — the implications are significant. Executives of not-for-profit behavioral health and social service organizations are keeping an eye on the growing scrutiny of tax status and its many financial implications.
- 7. Executive Guide to Budgeting & Budget Management**
What is best practice in budgeting? How do I use my budget as a management tool? This practical web seminar teaches you the basics of budget management, focusing on types of budgets, budget methodologies, and technology tools for budgeting. This briefing also provides a systemic plan for executives and information technology professionals who are moving their organizations towards maximum utilization of integrating technology planning with strategic planning.
- 8. Financing Your New Market Opportunities: Sources of Funding for Growth**
Developing new services takes financial resources...in some cases significant resources. And, as the U.S. health and human service field moves toward more a more competitive model, government policymakers expect that service providers will use private capital to finance these new service developments. In that context, if you’re organization is looking at starting a new service line, where can you turn for the capital you need to finance growth and development. This session looks at the options for financing your new market opportunities.

9. **The Four-Step Model for Metrics-Based Management: Improving the Bottom Line with Better Use of Data**
When used correctly, performance measurement data can help an executive team better lead and 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 essential components of metrics-based management, and how to obtain these metrics from your current system.
10. **The Great Divide: Bridging the Gap Between Clinical & Financial Executives on the Issues of Organizational Accountability & Cost Management**
Some clinical executives believe that cost analysis of programs or services is an "unnecessary" administrative burden in the face of meeting their social/mission-based needs. Likewise, many financial managers in social service organizations view their role as only responsible for financial compliance and revenue maximization. Financial and clinical managers must work together to bridge the divide between direct services and program clinical accountability on the one hand, and operational and fiscal accountability on the other. This session will discuss this issue in detail, its implications within the behavioral health and social service environment, and possible solutions to close this "gap" for organizations.
11. **How to Re-Structure Clinical Operating Processes to Increase Productivity & Decrease Costs**
There are a number of factors at play in the field that are prompting behavioral health and social service organizations to re-energize their efforts around assessing and improving staff productivity. The market is changing in sweeping and significant ways, including: declining reimbursements, increased financial risk, rising costs and labor shortages, increased competition, and increased accountability. How do you measure productivity? Learn how to manage productivity standards and compensate based on productivity.
12. **Information Technology Budgets: How Much Should You Spend?**
Determining your information technology requirements and then obtaining and maintaining those requirements, within a budget, is a tremendous challenge. There is no "one number" for the right level of expenditures. So, given this environment, how do you find long-lasting technology solutions and select as partners vendors with a good fit and a "bright future?" We share a few "golden rules" of technology planning that our consulting team has developed from our experience working with organizations in the field as they develop and implement their technology plans.
13. **Maintaining (& Increasing) Your Organization's Profitability: A Structured Approach to Diagnosing Your Organization's Revenue & Margin Challenges**
Shrinking profit margins seem to be a common trend among behavioral health provider organizations. The questions for management teams then become: "Why are margins shrinking?" and "What should be done about it?" Learn the answers to these questions and more as we examine the common management situations contributing to declining contract and organizational profitability – and discover common solutions that actually work.
14. **Managing Consumer Demand for Services on a Fixed Budget: Developing a Budget Tool for Uncompensated Care**
With increasing demand for service by consumers without insurance, the use of modeling tools is a critical addition to the financial "toolbox" of any organization. Learn how an actuarial budget tool was developed to project consumer demand and how this methodology can be applied in your organization.

15. Maximizing Your Medicaid Billing & Collections – Improved Processes for Both Fee-For-Service & Managed Care
In today's behavioral health and social service market, most provider organizations are struggling with both how to decrease expenses and how to increase the financial resources that are available for program development and service delivery. One often overlooked solution is to improve the collection rate for the services that are rendered. It is not uncommon for organizations in the field to have collection rates of only 80%, meaning that an organization with \$1 million in annual revenues is losing \$200,000 to bad debt expenses. Even a small improvement in collections can have a positive financial impact. In this session, learn better accounts receivable practices by learning the key elements of successful collection.
16. Metrics-Based Management: Benchmarking, Performance Targets, & Management Dashboards
In this web seminar, learn how to use key metrics to move your organization to a best-in-class status by comparing your performance with leaders, both within the field and from other industries. You will learn how to develop the appropriate benchmarks and how to track progress towards reaching the benchmark targets.
17. Metrics-Based Management: Key Performance Indicators
In this web seminar, you will learn how to use metrics-based management principles, not only for day-to-day operations, but also to track the progress of your strategic plan. Key performance indicators (KPIs) provide ongoing status tracking of your organizations strategic objectives and allow your management team to take timely corrective action if needed.
18. Metrics-Based Management: Using Data to Enhance Quality of Care & Operations
The effective use of data can help managers improve both the quality of care and the efficiency of day-to-day operations. During this web seminar, you will be introduced to the benefits of a data-driven organization and will learn how to create and use clinical performance metrics to improve your own system.
19. A Model for Calculating Your Return-on-Investment When Investing In Technology
"We have a limited budget - how do I decide how much to spend on technology investments?" Learn how to use return-on-investment analysis models to answer this question. This is a "crash course" in traditional return-on-investment (ROI) methodologies - including net present value, intangible value, and payback periods - which can be immediately applied when evaluating the pros and cons of a technology acquisition.
20. Performance-Based Compensation: Tying Employee Compensation to Organizational Performance
The final step in moving to a metrics-based management organization is to implement employee compensation models that reward organizational performance. This web seminar will focus on the objectives of a performance-based compensation system, common models used in the industry, and key steps for developing and implementing a plan.
21. Risk Management for Psychiatric Medical Directors & Administrative Psychiatrists: What You Need to Know to Do Your Job Well & Stay Out of Trouble
Clinical leaders in behavioral health organizations bring a critical dimension to the executive management team. They express the clinical vision that drives programs and services, represent the clinicians and assure that clinical concerns are integral to executive decision-making. To be effective in this role requires a broad and detailed understanding of the challenges and opportunities facing the organization, expectations of key stakeholders, and accountability for clinical performance. Clinicians who assume leadership roles by virtue of their years of clinical experience may not have the range of knowledge and expertise they need to fulfill this critical role. During this presentation, you will learn about the most important trends you'll need to address, performance expectations for which you are likely to be accountable, and how to assess the value of the clinical services you deliver.

22. Understanding & Enhancing the Role of Your Organization's Medical Director: Making Your Investment in a Medical Director a Value-Added Proposition

There is considerable ambiguity in the medical director's role in the behavioral health and social service field today. Generally, the term "medical director" is used to describe psychiatrists functioning in an often ill-defined relationship with a non-medical executive director, especially regarding line authority and relationships with other senior administrators. In practice today, psychiatrists with the title 'medical director' provide a wide range of functions. The questions for most organizations include: What do we need from a medical director? How do I evaluate if our medical director is performing satisfactorily? Do we have the right person performing those medical director functions? This session will describe the many roles served by medical directors; discuss organizational models for these functions; and describe how to evaluate the performance of your current medical director function.

23. Update on Reimbursement for E-Health: Making E-Health Services Add to Your Bottom Line

Virtually all states are now actively engaged in e-health strategies to facilitate the use of information technology to make the health care system more effective while providing greater value and higher quality. "E-health," health care practices supported by electronic processes and communications, including health information technology (HIT) and electronic health information exchanges (HIE), can significantly improve health care delivery and quality and reduce costs. Learn how states are promoting e-health policies and initiatives, encouraging a wide variety of public and private sector efforts.

24. Assessing Your Yield on Current Contracts & Developing Revenue Maximization Strategies

Shrinking profit margins seem to be a common trend in these challenging economic times. The questions for treatment foster care management teams are: why are margins shrinking? - and -what should be done about it? Join us to examine the common management behaviors contributing to declining contract and organizational profitability - and discover best practice solutions. This intensive management training will combine didactic presentation, case examples, and participant discussion of this critical management issue.

V. Technology & Information Management Seminars

How Much is Enough? Evaluating Strategic Technology Investments

Seminar Agenda:

- ◆ *Steps in Building a Technologically Superior Organization*
- ◆ *Where Does Your Organization Stand, Technologically Speaking?*
- ◆ *Case Study: High Tech Doesn't Mean High Anxiety*
- ◆ *Performance Management for Technology Investments: Predicting & Measuring ROI*

How much should my organization invest in technology? How do I link technology planning with other strategic decisions? And, how do I tell if my investment is working? Managers often find themselves in a situation where their training, experience, and education have not prepared them (e.g. managing the use of technology). After employee expense, information technology (IT) may represent the largest component of your budget, yet may be the least understood organizational resource. The strategic questions to ask are: (1) How much is enough? and (2) When I get there, how will I know it? This seminar gives you a strategic framework for understanding technology benchmarks in the industry, discusses best technology practices, and gives you practical tools to put you back in charge of your technology strategy.

Lots of information to digest and think about. Thank you for providing this opportunity!

- 2008 Seminar Attendee

How to Select an Information System & Write a Contract to Assure Successful System Implementation

Seminar Agenda:

- ◆ *From Proposal to Contract: Steps in Contracting With a Technology Vendor*
- ◆ *Planning for the Implementation of New Technology: Your Vendor's Success Depends on You*
- ◆ *"Over Budget, Behind Schedule & Still No Report": A Tried & Tested Approach to Turning Around a Sinking Software Implementation*

So you decided on new software - now what? Don't sign the contract until you attend this seminar! Senior managers often think that all their effort expended for software selection was the hard part and that their work is over when they get ready to sign on the dotted line. In reality, a poorly developed and managed Information Technology (IT) contract is often the cause of frustration, expense, cost overruns, legal difficulty, and a significant waste of time. This seminar gives you practical tools for managing IT contracts and makes you aware of pitfalls to avoid during the implementation. The seminar leader focuses on your role in contract management, expense control, holding your vendor accountable, and managing an IT implementation plan.

VI. Technology & Information Management Web Briefings

- 1. Best Practice in Software Selection: An Enhanced Approach to Software Selection for Behavioral Health & Social Services Organizations**
If your current software system is ready for retirement, and your organization is on the cusp of determining what's next, this session covers it all. You'll enjoy this entertaining, yet practical, presentation that takes you through a step-by-step "best fit" process for preparing your organization's readiness for an upgrade through choosing an information system.
- 2. Complex Software Implementation Planning & Execution**
What are the best practices for successful implementation of information technology in behavioral health and social services organizations? What are the pitfalls? The implementation of an information system demands a number of key steps and best practice processes to be successful. Learn from first-hand experiences gathered from our consulting team and the proven practices for effectively and efficiently implementing a new IT system.
- 3. Dashboards, Benchmarking & More: Real-Time Information for Organization Performance Improvement**
Get the most from your current information system investment. Build peak performance by selecting and comparing key financial, clinical, and operational metrics with industry benchmarks or those of "best in class" provider organizations. Access real-time data with dashboards and scorecards to improve organizational performance. Learn about getting the most out of your system, and make the best use of current resources. Our experts will share real-life examples of the use of real-time data to improve organizational performance.
- 4. Defining Your Key Performance Metrics**
Join us for a session that will focus on identifying key performance metrics, operationally defining those metrics, and leading versus lagging indicators.
- 5. Developing a Performance Scorecard**
In this session, the *OPEN MINDS* team will look at developing a performance scorecard and using performance data to bring about peak organizational performance.
- 6. Emerging Technologies for Cognitive Retraining & Improving Cognitive Functions**
Recent studies have shown that cognitive function can be improved at virtually any age. A growing number of brain enhancement tools are now available to both improve cognitive health and provide cognitive retraining for a number of disorders. Learn about the latest developments in cognitive retraining technology, and what impact these developments will have on the delivery of behavioral health services.
- 7. Evaluating Your Data System Reporting Functionality: A Step-by-Step Approach**
We tackle the old saying, "the devil is in the details," in this popular presentation addressing data overflow issues. Data is good, right? And we would all agree with that - if you can find it, apply it, and verify its relevance. Walk away from this presentation with specific knowledge of the processes that will allow you to reach the full potential of your current information systems.
- 8. High Leverage From Low Tech: Health & Human Service Uses of Cell Phones, iPods, PDAs, & More**
Searching for a low-cost way to enhance patient monitoring? Determining how to manage your data and monitor progress without breaking the budget? Low tech solutions may be the answer. Adopting new technology (on a grand scale) may be expensive. Sometimes "low tech" can be a low cost and low maintenance alternative, providing great leverage in tech investments for a range of populations. Learn how low tech is having a high impact in the behavioral health field. New options in the field such as disease management with cell phones, iPods for continuing education, listserv-based consumer support groups are easy to adopt and use.

9. **How to Develop Functional Specifications for Choosing an Information Technology System**
If your current software system is ready for retirement and your organization is on the cusp of determining what's next, it is critical that your next information system will meet your present and future information needs. This web seminar will provide a practical approach that takes you through a step-by-step best fit process for preparing your organizational readiness for an upgrade through choosing an information system.
10. **How Technology Is Creating New Market Opportunities in Community-Based Settings**
In the past two years, a number of new technologies have arrived in the marketplace that are facilitating a new degree of freedom for consumers with disabilities and chronic health care conditions - and reducing costs. Technological supports are enabling more consumers to move from institutional settings to community-based settings. And, a number of technologies are also reducing the manpower requirements for case management and their support services. In this presentation, *OPEN MINDS* faculty members will provide an update on the applications of new technologies and the financial models that are facilitating their adoption.
11. **How to Get Your Current Electronic Medical Records System to Meet Future Compliance, Reporting & Certification Needs**
The information requirements for behavioral health providers are growing increasingly complex, with new compliance reporting and certification requirements. In this information-packed and practical session you will learn how to ensure that your current electronic medical record (EMR) system can meet not only present, but future reporting needs. Learn about getting the most out of your system, and make the best use of current resources. Our experts will share real-life examples of the use of real-time data to improve organizational performance.
12. **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. Our session leader will lead you through the steps in the technology planning process and wrap up the session with some case examples of technology planning.
13. **Improving the Effectiveness of Case Management Through Deployment of Informatics**
Many health care professionals believe that information technologies deployed in health care systems have the potential to advance clinical care, drive economic efficiencies, and provide improved consumer access. Our faculty members will discuss opportunities to use data to improve customer care and the complexities of increased access to information.
14. **Innovative Treatment Technologies and How They Are Changing Treatment Delivery**
Innovations in treatment technologies are creating exciting possibilities for more effective diagnosis and treatment of mental illness and addictive disorders. Learn about the latest advances in neurotech and pharmaceutical delivery systems, and how these new technologies interface with more traditional treatment modalities. Our panel of experts will help you understand the implications of these new technologies for consumers, and how organizations of the future will deliver service.
15. **Issues in Estimating & Achieving a Positive ROI From EHR Adoption: The *OPEN MINDS* EHR ROI Model**
How much should you spend on technology? A common question. The answer: It depends on the projected return on your investment (ROI). This session is designed to discuss an ROI model that you can put to use in budgeting. *OPEN MINDS* will summarize the basic elements of budget building and review models for assessing your ROI.

16. **A Look at New Assistive Technologies & How They Are Changing the Field**
 The number of people receiving behavioral health and disability treatment and support is increasing, and so are the assistive technologies and options available to serve them. New technological developments in biotechnology, computing, telecommunications, cognitive retraining and other fields are ushering in a new era of opportunity and challenge. We are seeing more self-service by consumers, technologies that require less time from highly-trained professionals and more home-based services. What is the link between these new technologies and the day-to-day business activities of behavioral health organizations? Learn about the latest developments and what impacts these developments are having in the field.
17. **A Model For Calculating Your Return-On-Investment When Investing In Technology**
 “We have a limited budget - how do I decide how much to spend on technology investments?” Learn how to use return-on-investment analysis models to answer this question. This is a "crash course" in traditional return-on-investment (ROI) methodologies - including net present value, intangible value, and payback periods - which can be immediately applied when evaluating the pros and cons of a technology acquisition.
18. **Models for Expanding Behavioral Health Service Access with eHealth**
 The world of e-health is colliding with behavioral health. New technologies such as one-on-one secure on-line chat, on-line self-assessment with expert systems, remote monitoring, and video conferencing are creating alternatives to traditional therapy. And, consumers seem to like these alternatives. In this session, our panelists will address the implications of these technologies for the future of therapy.
19. **Morphing Your Electronic Records Platform to a Recovery Model in a Consumer-Driven System**
 The recovery model is fundamentally moving the behavioral health system to a consumer-driven model of care. In this session, you will learn best practices for ‘evolving’ your EMR platform to a recovery model focus in a consumer-driven system. Our expert faculty will share practical examples of how to move your EMR to a consumer-driven model.
20. **New Technologies for Smart Homes: Deploying Home Automation to Keep Consumers in the Community**
 In the past few years, a number of new technologies have arrived in the marketplace that facilitate a new degree of freedom for consumers with disabilities and chronic health care conditions – and reduce costs. Smart home technology is allowing persons with disabilities to retain a level of independence within their home which previously would have been thought impossible. Join our experts to examine how this technology is changing the face of care and support services for persons with disabilities.
21. **The New Technologies Increasing Consumer Self-Service in Health & Social Services**
 New technologies such as one-on-one secure on-line chat, on-line self-assessment with expert systems, remote monitoring, interactive video programs and telehealth are creating alternatives to traditional therapy. And, consumers seem to like these alternatives. In this session, we will discuss some of these new models and the implications for the future of therapy.
22. **Optimizing Your Investment in Electronic Health Records to Improve Behavioral Health Care**
 There is great interest in electronic health records — both by payers and by consumers. However, electronic health records bring with them implications for the organizations that manage those records, the sponsors of the records, and for consumers whose information is in the records. Join our group of experts to get an idea of the state of development of electronic health records and the implications for your organization.
23. **Over Budget, Behind Schedule, & Still No Reports: An Approach to Turning Around A Sinking Software Implementation**
 In this session, our team will provide a step-by-step approach to assessing your implementation software. The session will examine common problems in implementing new software and moving from implementation to maximizing your system investment.

24. ROI of Technology: Models to Evaluate Your Investment
So many technologies and so little money. How do you evaluate the return to your organization on technology investments? How do you determine if that investment has been achieved? In this discussion, our experts will present their experience in evaluation of the ROI of technology investments they have implemented in their organizations.
25. Should Your Program Offer E-Health Services: The *OPEN MINDS* E-Health Cost/Benefit Model
Given both the opportunities and the challenges, there are several best practice axioms that behavioral health and social service providers should refer to when embarking on a plan to implement new software and electronic health records technology.
26. Technology to Support Integrated Behavioral & Physical Care
Integrated physical and mental health care is emerging as a needed, promising, and soon to be standard model of service delivery. The current model of health care in the United States artificially separates behavioral from physical health leading to higher health care costs and negative effects on health care access and outcomes. The building evidence of the consequences of a fragmented health and mental health care system, and the benefits which can accrue from integration, has been the focus of many recent studies by leading industry and academic groups. Come discover the new models of integration that are emerging and the key role that technology plays in the success of truly integrated care.
27. Tools for Remote Management of Your Mobile Workforce
The increasing use of home and community-based treatment approaches will require new technologies to both support community-based technology, and track the key metrics of these new approaches. Learn the state-of-the-art in the new technologies available to support and facilitate community-based care, and how you can apply these technologies in your organization.
28. Turning Around Your Lagging Software Implementation: How to Get on Budget & On Schedule With the Reporting You Need
This session is designed for the managers in any organization where your software isn't giving exactly everything you've hoped for. While some of the problems could be the software or the system, other typical problems in technology implementation are directly linked to how organizations choose to install, train, and develop their use of new technology tools. Learn the common problems in implementing new systems – and how to identify and correct the problems that you're experiencing.
29. Using Brain Imaging, Brain Mapping, & Cognitive Training Tools to Improve Consumer Care
New developments in brain imaging, brain mapping and cognitive retraining are bringing new found precision in both the diagnosis and treatment of a number of behavioral health conditions. Learn about the latest developments in each of these exciting areas, and what impact these developments will have on the delivery of behavioral health services.
30. Using Informatics to Gather Predictive Information & Select Optimal Clinical Practices
A number of behavioral health organizations have advanced the use of technology and information to include extrapolation, modeling, forecasting, and prediction. In the predictive phase, technology is routinely used to craft strategic change and drive performance. Data is used to predict and plan for the possibilities to further enhance operations and care delivery. These best-in-class organizations have moved from answering the questions of "what happened?" and "how do we make sure we do it right?" to "how can we make it better?" and "how do we make that happen?" Our panelists will discuss opportunities to use data to improve customer care.

31. Using Information Technology to Enhance Pay-for-Performance Initiatives

Many new pay-for-performance programs are being adopted across the country and around the globe. Measurement in pay-for-performance is likely to extend beyond quality indicators and measures of patient satisfaction and adoption of information technology, to include efficiency measurement. The wide variations in the cost of care with no apparent relation to the quality of care have driven purchasers, health plans, and policy-makers to look for ways to get more value from the health care dollar, and to consider how well providers are controlling costs while still maintaining quality.

32. Using Technology to Facilitate Consumer Self-Care & Consumer Choice in the Behavioral Health Field

Health care is headed toward consumer-directed and voucher models, where the patient has the ability to decide what treatment they receive, how they receive it, and who provides the treatment. Consumers will now demand services, regardless of need, and will search the competitive market until they find a professional who will serve them. Deciding on a service provider will hinge on quality and price, forcing providers to focus on reputation and branding not just service and delivery. So what does this mean? One of the challenges for executives is estimating the real speed of change in their market. While most organizations want to position themselves on the “leading edge” of change, that can rapidly become the “bleeding edge” if time to change isn’t taken into account.

33. Using Information Technology to Meet the Challenges of Implementing Evidence-Based Practices

There is growing interest in adoption of evidence-based practices (EBP) in the behavioral health field. Many payers and many EBPs have created not only a challenge of clinical philosophy but also a challenge to the systems. Join our faculty to learn more about how systems are currently being adopted for the behavioral health field.

34. Adding Telehealth Services To Your Consumer Service Lines

The acceptance of and reimbursement for e-health services is on the rise. Should your organization start to incorporate electronically-enabled services into your consumer service lines? If you think so, what services would you offer and how do you make sure they are financially viable? To answer these questions, join our briefing on the “hows and whats” of telehealth.

35. An Update on Reimbursement for E-Health: Making E-Health Services Add to Your Bottom Line

Virtually all states are now actively engaged in e-health strategies to facilitate the use of information technology to make the health care system more effective while providing greater value and higher quality. “E-health,” health care practices supported by electronic processes and communications, including health information technology (HIT) and electronic health information exchanges (HIE), can significantly improve health care delivery and quality and reduce costs. Learn how states are promoting e-health policies and initiatives, encouraging a wide variety of public and private sector efforts.

36. 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. Our team will lead you through the steps in the technology planning process and wrap up the session with some case examples of technology planning.

37. What Performance Management Metrics Does Your Executive Team Need & How Do You Get Them From Your Current System?

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.

VII. Leadership & Governance Seminars

An Executive Update of U.S. Financing of Health & Human Services: Implications for Leadership

Seminar Agenda:

- ♦ *Trends Impacting Organizational Strategy & Operations in the Behavioral Health and Social Services Field*
- ♦ *CMS Policy Changes Bring New Challenges for Medicare & Medicaid*
- ♦ *Implications for Leadership: Implementing These Changes in Your Organization*
- ♦ *Management Tools for Leaders to Align Organizational Strategy & Operations*

The financial system for health and human services is complex and continually evolving. Several changes at the Federal level are resulting in significant financial impacts for behavioral health and social service providers. In addition, the Deficit Reduction Act of 2007 brought changes to Medicaid spending and related rules. For states, systems are evolving in different directions. This seminar provides an update on the changing Federal funding landscape and the challenges for leaders in terms of both strategy and operations.

The presenter's ability to engage participants was excellent.

- 2008 Seminar Attendee

Best Practices for Front-Line Supervisors: Achieving Employee Performance, Retention & Commitment Through Effective Supervision

Seminar Agenda:

- ♦ *Getting It Right From the Start: Success in Hiring New Staff & Promoting From Within*
- ♦ *Creating a Competency-Based Performance Development System*
- ♦ *Design a Personal Development Plan & Enhance Your Performance*
- ♦ *Achieving Peak Performance: Managing, Developing & Retaining Your Staff*

The rapidly evolving behavioral health environment requires increasingly sophisticated supervisory skills including managing for accountability for both clinical and financial outcomes, engaging in continuous improvement and working with a diverse workforce. This one-day seminar covers key skills for front-line supervisors including: making the right hire, developing and retaining employees, understanding personal styles, creating a competency-based performance development system and achieving peak performance.

Do I Have the Right Team? Assessing & Developing Leadership & Management Competencies

Seminar Agenda:

- ♦ *Management Competencies for Optimal Organization*
- ♦ *Improving Your Use of Leadership Styles for Optimal Organization*
- ♦ *Planning for Performance :Models for Building Organizational Competencies*
- ♦ *Management Team & CEO Succession Planning*

Do you have the right team? As a senior executive, you live in the future. You see the future and respond with strategies; leading by mission, vision, and values. But, when you get to the future, who will follow you? This seminar asks the crucial questions - do I have the right team, and am I preparing them for the future I am building? If not, how do I close the skill gap to get from here to there - do I replace, recruit, or build the talent that I need? Learn what competencies to build (and how), and when to recruit, in this information-packed one-day seminar.

Enhancing Customer Service Skills for Front-line Services Staff

Seminar Agenda:

- ♦ *Enhancing Customer Service Skills*
- ♦ *Delivering Quality Customer Service*
- ♦ *How to Change Customer Problems Into Opportunities*
- ♦ *A Few Words About Stress - "Stressed For Success"*

Why does providing exceptional customer service matter? What competencies are needed to provide exceptional customer service? This one-day seminar will provide you with the tools necessary to build, enhance, and retain customer loyalty. How do I set up a customer feedback process? Why is customer feedback important? You will develop a working knowledge of listening skills designed to improve customer satisfaction results.

How Does Our Executive Team Know We're on Track? Using Data-Driven Management to Improve Organizational and Program Performance

Seminar Agenda:

- ♦ *Why Data-Driven Management is Critical to Improve Organizational & Program Performance*
- ♦ *Defining Your Key Performance Metrics*
- ♦ *Developing A Performance Scorecard*
- ♦ *Using Data-Driven Management for Peak Performance*

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 seminar, you will be introduced to the benefits of management metrics and how to obtain them from your current system.

How to Leverage Human Resources Investments for Increased Growth & Profitability

Seminar Agenda:

- ♦ *Becoming an "Employer of Choice"*
- ♦ *Understanding the Human Resource Management Competencies That Your Organization Needs to Succeed in the Decade Ahead*
- ♦ *Managing the Employment Life Cycle & Succession Planning*
- ♦ *Assessing Your Organizational Training Needs*

In today's highly competitive workplace, employers of choice - companies that are able to exceed their growth and profitability goals - are able to attract and maintain the best talent. Much of this success comes from having a highly strategic partnership with human resources (HR) and understanding the key role HR plays in building success. Does your organization have the appropriate human resource management functions in place to manage growth in your company? Have you discovered how to get maximum value out of HR? Do you know what you'll need from HR in order to exceed your profitability goals for the future? Attend this highly interactive seminar to find out how to harness the power of your Human Resources management team and how this often-overlooked and under-appreciated department can assist you in becoming an employer of choice!

Very good! An inspiring and motivational seminar!

- 2008 Seminar Attendee

Improving the Effectiveness of Your Non-Profit Board: Tools for Planning, Performance Measurement & More

Seminar Agenda:

- ♦ *Trends Shaping Organizational Strategy & Director Roles in the Behavioral Health & Human Service Field*
- ♦ *The Role of the Non-Profit Board of Directors in a Changing Environment*
- ♦ *Developing a Winning Development Plan: A Step-By-Step Look at Classic Fundraising Tools & Their Application in the Field*
- ♦ *The Effective Executive Director & Organization - What Is the Role of the Board?*

How can board members, and a board of directors as a whole, be more effective? The role of the board in not-for-profit behavioral health and human service organizations is changing. Board members need to know the major environmental forces affecting the field, their role in governance, and how to evaluate their executive director and his/her fundraising initiatives. This power-packed seminar gives new board members an important knowledge base and is a great refresher for veteran directors. This seminar also gives you an awareness of best practices in board governance and practical tools you can take back to your board.

Increased Responsibility & Accountability for Non-Profit Boards Serving Children & Families

Seminar Agenda:

- ♦ *Trends Shaping the Role of Non-Profit Organizations in the Child Welfare & Social Service Fields*
- ♦ *Playing by the Rules: Building an Effective Corporate Compliance Program*
- ♦ *Ensuring Accountability: Best Practices in Compliance & Performance Reporting*
- ♦ *Best Practices in Board Governance*

Is your organization in compliance with all the rules and regulations that it must comply with - from state and local to HIPAA and Sarbanes-Oxley? Board directors are ultimately accountable for the organizations they govern - from ensuring compliance with the law to achieving strategic objectives. This seminar gives you all of the information you need to understand how compliance programs and strategic performance measurement can be used as tools by boards to effectively govern and prepare for success in the future.

Leading Through Constant Change: The Mandate for Today's Successful Executive

Seminar Agenda:

- ♦ *A Context for Change: A Look at Drivers of Organizational Change*
- ♦ *A Framework for Change: A Look at Managing Organizational Change*
- ♦ *Understanding Leadership Styles*
- ♦ *How to Leverage & Energize Your Workforce: Applying Your Leadership Style to Improve Motivation, Recognition & Retention*

The presenter kept our interest and involved us to make the presentation more interactive.

- 2008 Seminar Attendee

What is your leadership style? Do you understand how different styles can be effective at different times, depending upon the organizational climate? How do you know when your style is truly an asset or a liability? Now that managing change has become a focal point in the behavioral sciences field, it's important to understand how your leadership style can make or break your organization in times of transition. It's also important to understand how people respond to change in organizations in order to help them transition and grow with the organization. This seminar will allow you to examine your own leadership style and identify how to adapt your style in order to help your employees manage change. In addition, you'll get tips for motivating, energizing, and recognizing your team in order to overcome resistance, gain commitment, and manage conflict.

Managing the Virtual Workforce

Seminar Agenda:

- ◆ *Factors Driving Growth in the Virtual Workforce*
- ◆ *Leadership Models and Qualities from Transactional to Ambassadorial Leadership*
- ◆ *Improving Communications in a Virtual World*
- ◆ *Effective Leadership Skills and Leading Virtual Teams*
- ◆ *Critical Strategies for Fostering Virtual Success*

How can you influence the behavior of a single employee, let alone a department or an entire organization when they are not on-site? How do you effectively monitor and oversee the work completed by the virtual workforce, including giving constructive feedback, coordinating work effort, and setting expectations? With the number of individuals working remotely continuing to increase, it is critical for executives and managers to develop new capabilities to span boundaries and improve employee productivity from a distance. This seminar is designed to provide executives and managers with practical strategies for managing the virtual workforce, facilitating long-distance communication, developing local leaders, and creating a culture for success to achieve organizational goals.

VIII. Leadership & Governance Web Briefings

- 1. Best Practices in Recruiting & Hiring**

Hiring and retaining the best talent is key to the success of any manager. In this web seminar learn proven principles and techniques for effective recruiting and hiring. This interactive on-line seminar is designed to help participants understand these techniques and learn how to apply them in organizational settings.
- 2. Building a High-Performing Executive Team: Keys to Fine-Tuning Team Performance**

The idea of 'team' has a changing concept in the new economic environment. Organizations now have many teams – permanent organizational work teams and special-purpose groups that meet only long enough to tackle a specific problem. No matter what the team situation, this session focuses on the skills needed to maximize individual contribution, understand team roles, overcome conflict, negotiate solutions, evaluate outcomes, and think creatively. These skills can be incorporated in a process that can be replicated in a number of settings in the workplace.
- 3. Conducting Effective Performance Appraisals/Progressive Discipline**

Effectively monitoring performance on an ongoing basis is a critical task for managers, but it is often very difficult for many supervisors. In this web seminar, you will learn how to clearly set performance expectations, provide useful feedback on an ongoing basis, and use progressive discipline when needed. Learn to maximize the performance of your team and ensure accountability for achieving organizational goals.
- 4. Emerging Best Practices in Supervision**

How can you succeed as a supervisor? If you are a new supervisor, or expect to be promoted soon to a supervisory role, this web seminar is for you. This briefing will help you assess your strengths and development needs in supervising people, give you best practice models of supervision, and help you produce an action plan for strengthening your supervisory skills back on the job.
- 5. Leadership Survival Guide for Turbulent Times: Tools You Need Today**

High-performance leaders must successfully navigate a constantly changing and complex environment to ensure their organization's survival. How do you recognize the unique challenges and opportunities your organization faces and craft strategies to effectively leverage your corporation's competencies? How do you lead transitions during major times of change? To maintain its competitive edge, your organization must be able to anticipate foreseeable changes and effectively react to those thrust upon it by market forces. Join us for a discussion of rules for leading in a recession and ways to adjust your strategy when real-world conditions dictate a change in direction.
- 6. Managing Managers & Managing Change as the Leader's Challenge**

Managing other managers requires a whole new set of skills. The task is no longer to directly supervise other managers, but to instead mentor other managers to maximize their own strengths to perform at their most effective level. And, for most executives and managers, an increasing part of their successful performance is leading their organization its people, processes, and structures through changing times.
- 7. Managing Your Non-Profit Board: How to Work Successfully With Your Board of Directors**

Working effectively with a board of directors is crucial for any non-profit chief executive officer. The board of directors can be a vital resource for both sustaining the mission and growing the organization – or an impediment to organizational progress. The key is how the CEO manages the board relationship. Our team will help you learn how to make your board a driving and vital force for your organization.
- 8. Managing the Virtual Workforce**

With the number of individuals working remotely continuing to increase, it is critical for executives and managers to develop new capabilities to span boundaries and improve employee productivity from a distance. This seminar is designed to provide executives and managers with practical strategies for managing the virtual workforce, facilitating long-distance communication, developing local leaders, and creating a culture for success to achieve organizational goals.

9. The New Financing & Customer Dynamics in the Behavioral Health & Social Service Field:

Drivers of Future Organizational Strategy

Remember the old saying, “Change is inevitable; so decide if you are going to embrace it and go for the ride, or get run over?” The role of the leader is to manage change in an organization – and it is the leader who shapes the executive team’s attitude about change. Understanding the market and the changes needed is a critical first step in the leader’s task. To take that all-important first step, join us for an executive briefing on dynamic industry change drivers and the infrastructure and talent necessary to keep pace with the industry trend settings.

10. Overcoming Brain Drain & Planning for Your Executive Team Retirement With Succession

Management: A Roadmap for Keeping Your Talent Pool Full

Talk to any human resource manager or board of directors, and they will tell you that succession management is very costly. Through this session you will learn about the succession management of current leader attrition and how to identify future leaders, invest in their development, and keep continuity in the leadership pipeline.

11. Understanding Your Executive Leadership Style & Using It to Build Your Leadership Capacity

Have you ever wondered if your leadership style is productive, or if you possess the ability to meet the challenges that lie ahead? Review the various styles of leadership, and, through an evaluation of your own personal style, discover the pathway towards your future leadership development.

IX. Marketing & Innovation Seminars

A Structured Approach to Maximizing Organizational Efficiency and Profitability Using Service Line Management

Seminar Agenda:

- ♦ *Service Lines Organization as the Backbone of Strategic Planning*
- ♦ *Making Decisions on New Service Offerings: When and How to Reformulate Your Services*
- ♦ *Steps and Tools for New Service Line Development: Service Line Development Checklists and Service Blueprints*
- ♦ *Using Target Costing and Zero-Based Budgeting to Evaluate Your New Service Line Plans*

Decisions about new service line offerings are critical to successful planning – and the future of any organization. In this seminar, you will learn how to create a service line model and use service line metrics for portfolio mapping. Next, we'll look at when and how to re-formulate your services. For making strategic decisions regarding new service line development, steps and tools for assessing and managing new service line viability will be covered. And, we'll address the "bottom line" with a session on how to use target costing and zero-based budgeting in service line planning.

The trainer is fabulous, could have had 5 days of her training.

- 2008 Seminar Attendee

Developing a Winning Marketing Plan: Using 'Best Practice' Marketing Tools to Meet Your Organization's Revenue Goals

Seminar Agenda:

- ♦ *Developing a Winning Marketing Plan: A Step-By-Step Look at Classic Marketing Tools & Their Application in the Field*
- ♦ *Marketing Diagnostics: How to Identify Your Revenue & Pricing Problems*
- ♦ *Beyond the Plan: Keys to Implementing Marketing Plans & Managing Performance*

How do I develop an affordable plan to bring in new revenue that my organization needs? What is a "reasonable" budget for marketing? You will learn the answers to these questions - and much more by attending this *OPEN MINDS* seminar. This intensive small group experience walks you through the marketing planning process from marketing management theory, to planning and budget development, to managing (and tracking) your marketing program's success. Don't miss this seminar - the only marketing seminar developed specifically for behavioral health and social service executives.

How to Win a Competitive RFP: Developing Tactics for Building New Customer Relationships & Writing Winning Proposals

Seminar Agenda:

- ◆ *Being Prepared to Compete: A Checklist for the 'Market Ready' Organization*
- ◆ *Deciding What to Bid: Keys in Strategic Sales*
- ◆ *The RFP Production Process*
- ◆ *It's Not Always the RFP: Beyond Paper to Contracts*

Every year, there are over \$4 billion in competitive requests for proposals (RFPs) issued in our field - how can your organization compete and win some of this new business?

Join us for the only seminar in the behavioral health and social service field that gives you practical tools to apply to your own business development efforts.

This seminar will give you a better understanding of your own organization's capacity to respond, how to price a proposal, and how to complete a winning RFP response. Learn from the winners! This seminar is the product of *OPEN MINDS* years of experience winning hundreds of contracts. We share our "trade secrets" to help you capture business!

Thanks so much for the updated communication regarding all of the systems that we as direct service providers must stay informed about.

- 2008 Seminar Attendee

Solution-Focused Sales: Tools to Beat the Competition & Close the Deal

Seminar Agenda:

- ◆ *Solution-Focused Sales: Use Consultative Selling to Eliminate the Competition, Shorten the Sales Cycle & Close the Deal*
- ◆ *Converting Prospects to Customers: Keys to Developing Prospects & Closing Sales*
- ◆ *Marketing Diagnostics: How to Identify Your Revenue & Pricing Problems*
- ◆ *Fine-Tuning Your Approach to Account Management: Understanding How to Keep Customers & Expand Your Work With Them*

"I spend a lot of time cultivating new customers, but I never seem to get those new contracts." Does that sound like someone in your organization? Spend a day learning the time-tested techniques for success in sales. The only one-day sales training program specific to the behavioral health and social service field, this course gives you practical skills you can apply immediately to bringing in new contracts. With an emphasis on consultative selling, this seminar increases your communication skills, as well as your confidence, in selling to your critical customers.

Succeeding With Grants: Keys to Attracting Grant Funding to Your Organization

Seminar Agenda:

- ♦ *An Update on Grant Opportunities in the Behavioral Health & Social Service Field*
- ♦ *Building Your Grants Database*
- ♦ *Setting Up Your Grant Writing Operation*
- ♦ *Writing the Winning Grant Proposal*

Can my organization get (more) revenue through grants? As budgets tighten, more and more behavioral health and social service organizations are looking at applying for grants to subsidize their services. The questions are two-fold: Should your organization invest in building a grant writing organization?...and...If so, how do you maximize your investment? This seminar will help you answer those questions and more.

X. Marketing & Innovation Web Briefings

- 1. Another Revenue Diversification Option: Winning Competitive RFPs**

Every year, there are over \$4 billion in competitive requests for proposals (RFPs) issued in our field – how can your organization compete and win some of this new business? This presentation will give you a better understanding of your executive team’s role in building your capacity to respond, evaluate, price, and complete a winning RFP response. This seminar is the product of *OPEN MINDS’* 20 years of experience winning hundreds of contracts.
- 2. Behavioral Health Opportunities in Chronic Disease Management**

The future of health care is the future of chronic disease management. Chronic diseases – long-term illnesses that are rarely cured completely – affect over 90 million Americans and place a substantial burden on society through lost productivity and increased health care costs. Medicare beneficiaries with five or more chronic diseases historically represent 20% of Medicare enrollment, however they account for 66% of total Medicare expenses. In this session, we’ll look at new tools being deployed to cost-effectively manage high-cost health conditions.
- 3. Converting Prospects to Customers: Keys to Developing Prospects & Closing Sales**

This session will provide tips for identifying qualified prospects and tactics to address common objections. The faculty will also show you how to use a written proposal as a competitive tool.
- 4. Coping With the Changing Field of Play – Bringing New Management Models to Service Delivery**

Remember the old saying, “Change is inevitable; so decide if you are going to embrace it and go for the ride, or get run over?” This applies to both organizational strategy and to the management practices required to make new strategies in a changing environment successful. Join us in a session focused on the “what, why, and how” of success in a changing behavioral health and social service environment. This session is an executive briefing on dynamic industry change drivers and the infrastructure and talent necessary to keep pace.
- 5. Designing a Private/Public Partnership**

Join us for a session that will detail the ins and outs of creating a private/public partnership. The session will define the purposes, roles & objectives of private/public partnership and developing a successful process for creating the partnership. We will also examine integrating continuous quality improvement with the partnership.
- 6. Developing A Winning Development Plan: A Step-by-Step Look at Classic Fundraising Tools & Their Application in the Field**

Fundraising - the organized activity of raising funds - is a necessary part of the business cycle of any non-profit organization. Obviously fundraising is not the main objective of a non-profit. It is a critical means to an end - the goal of fulfilling your mission, reaching those in need, and accomplishing the things you are passionate about. Fundraising today is a big business. How can you increase your chances of getting a fair share of those resources for your organization? Join us for this informative session and get a jump start on the development of your plan.
- 7. Developing New Services: A Best Practice Guide**

As markets change, the services we need to be competitive are changing as well. As market change accelerates, the number of new services needed and the speed of their launch accelerates with it. That is why behavioral health and social service organizations need a structured approach to selecting, designing, and launching new programs. In this fascinating session, learn how to decide which service lines are best for your organization and the steps for development and implementation using state-of-the-art tools.
- 8. Enhancing Your Customer Service Skills: A Guide for Staff on the Front-Line**

In an era of consumer direction, consumer recovery, consumer choice, and consumer satisfaction, improving your customer service skills is more critical than ever. In this interactive on-line seminar, you will review the standard methods to deal with and diffuse customer complaints and develop a working knowledge of the listening skills designed to improve customer satisfaction results.

9. Entrepreneurship & Innovation in Behavioral Health & Social Services: A Look at the Trends & the Future

The future is only the present not yet lived. And with the necessary business acumen, an organization can strategically position itself for a future of market maximization. Learn how to link insightful assessment of the external business landscape with the awareness to keep organizations vital and viable. Join us for the always-popular update on industry trends and the future.
10. From Facility to Community: Home-Based & “Smart Home” Service Opportunities

In the past few years, a number of new technologies have arrived in the marketplace that facilitate a new degree of freedom for consumers with disabilities and chronic health care conditions – and reduce costs. Home-based and smart home technologies are allowing people with disabilities to retain a level of independence within their home which previously would have been impossible. Join us as we examine how this technology is changing the face of care and support services for people with disabilities.
11. Keys to Successful Implementation of a Population-Based Care Management System

Join us for a session that will focus on project planning, the role of senior executives in implementing new care management processes, and essential ingredients in the change management process.
12. Marketing Diagnostics: How to Identify Your Revenue & Pricing Problems

Revenue and expenses do not line, month after month of budget variances and you are no closer to pinpointing either increased revenue streams or expense cuts. *OPEN MINDS* faculty members offer seasoned time-tested strategies to help diagnose the problem of budget variance, marketing problems, pricing in the marketplace through case examples.
13. New Developments & Service Opportunities in Neurotech & Cognitive Retraining Technology

Recent studies have shown that cognitive function can be improved at virtually any age. A growing number of brain enhancement tools are now available. Learn about the latest developments in cognitive retraining technology, and what impact these development will have on the delivery of behavioral health services in order to identify opportunities for your organization.
14. Setting Up Profitable School-Based Services

Family counseling services are provided at a number of community locations including community centers, schools, and public clinics. School-based services may also include intervention with an individual student through classroom observation or therapy as well as broader services such as training seminars for teachers and topic-focused presentations for students and parents. School-based services help to keep children in school and provide programming opportunities for providers.
15. Solution-Focused Sales: Use Consultative Selling to Eliminate the Competition, Shorten the Sales Cycle, & Close the Deal

This session will examine why and how successful salespeople focus on buying (not selling) behavior, how to highlight your strengths - legal ways to shape the procurement process, and tried and true ways to shorten the sales cycle.
16. Strategic Revenue Diversification: What Are The Options & 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.

17. Succeeding With Grants: Keys to Attracting Grant Funding to Your Organization

Can my organization get (more) revenue through grants? As budgets tighten, more and more behavioral health and social service organizations are looking at applying for grants to subsidize their services. The questions are two-fold: Should your organization invest in building a grant writing organization?...and...if so, how do you maximize your investment?

18. Tools You Need for Launching a New Service Line

Whether your organization is a non-profit, for-profit, or public agency, in the current environment a critical management issue is balancing the number of services with no financial return (which you maintain for reasons such as community service, market positioning, or legal mandate) with those that provide the financial return to balance the budget. Ideally, this is an on-going process - revised based upon factors such as risk and returns, profitability and performance, customer demand and market share, competition, and relevance to organizational mission. What are some of the business tools available for assessing an organization's mix of services and launching a new service line? Join us as we discuss service line management strategies that ensure that your organization's financial and human resource investments are used appropriately.

19. Understanding Your Organization's Entrepreneurial I.Q. – Is Your Organization Ready For the Era Of Entrepreneurship & Innovation in Behavioral Health & Social Services?

The saying goes that you can learn entrepreneurship, but you can't teach it. But, what does that mean? What is entrepreneurship in the context of behavioral health and social services? And, is your organization prepared? Join us for a look at current thinking on entrepreneurship and intrapreneurship – and assess your team's readiness.

20. Using Innovation to Your Strategic Advantage – Creating a Marketing Edge by Harnessing the Competitive Advantages of Emerging Technologies

Exciting new technologies are here – and there are more to come. But, are they right for your organization? How do you assess which innovations fit your market and your organization? Do you have the talent and the capital? And, if you build it, can you operate a new innovation-based service line and make a margin? Learn how to incorporate assessment of the market effects of emerging innovations in your planning process – and how to target innovations for further analysis. Understand how to use state-of-the-art management tools in new service line decision making, new service development, and market pricing. This session will provide the 'next steps' framework for harnessing the competitive advantage of new innovations.

21. Using Large Account Management Techniques to Develop & Sustain Long-Term Customer Relationships

Why are some organizations able to continually change – and grow – with their customers? Whether they use the term or not, the key is applying account management principles to their customer relationships. In this informative session, learn how to develop strategic relationships with customers and 'grow' them over time.

22. What are the Opportunities in All the Discussion of Primary Care Integration? A Look at the Models & the Margins

Integrating primary and behavioral health care and promoting closer collaboration between federally qualified health centers and community mental health centers are both part of the larger public mental health system transformation initiative in many states. With the goal of assuring that individuals with serious mental illness experience clinical integration of primary and behavioral health care, these initiatives provide models of innovation for putting the concepts and principles of integration into action, and in making significant, practical improvements in the physical and mental health care of individuals with behavioral disorders.

23. Developing a Winning Marketing Plan: A Step-by-Step Look at Classic Marketing Tools & Their Application in the Field

Understanding and interpreting the market is the lifeblood of any successful business. However, many organizations fail to understand the difference between knowing the market and putting together a strategy to respond to the market in a systematic way. This interactive on-line seminar will provide a proven step-by-step process, for building your organizations marketing plan and ensuring that the marketing is linked with your overall organizational strategy.

24. Marketing Diagnostics: How to Identify Your Revenue & Pricing Problems

This session will introduce the possible variables in revenue & pricing issues; differentiate organizational marketing problems from issues specific to pricing, promotion, or product line; and provide case examples of problems (and solutions) to marketing challenges.

25. Winning Competitive RFPs: Strategy & Tactics

More payers are moving to selecting service organizations using competitive bidding. And, every week hundreds of competitive request for proposals (RFPs) are issued in the health and human service field. How does your organization make decisions about pursuing these opportunities? Do you have effective processes in place for responding? Learn proven strategies and tactics from the *OPEN MINDS* team for improving your success rate.

XI. Strategic Management Seminars

Best Practice Management: Tools for Achieving Superior Results Through Others

Seminar Agenda:

- ♦ *An overview of the futurists predictions of what the future holds for the behavioral health and social service industry*
- ♦ *A statistical update on health care, behavioral health and social service spending*
- ♦ *Discussion of current trends shaping change in the behavioral health & social service sector*
- ♦ *Discussion of the current implications of the changing market in terms of finances and leadership*

Managers in the field are being asked to do the impossible: provide more services with fewer resources than before in an increasingly complex environment. The name of the game is change and it has become the standard operating state for many in the health and social services field. So, how do you achieve success in this dynamic state? The answer lies in your ability to supervise and motivate others during times of change. Whether you're a recently promoted supervisor or senior leader, or an experienced manager, this one-day seminar offers you the ability to identify strategies for managing change through others as well as managing performance for optimal results.

Best Practices for Front-Line Supervisors: Achieving Employee Performance, Retention & Commitment Through Effective Supervision

Seminar Agenda:

- ♦ *Getting It Right From the Start: Success in Hiring New Staff & Promoting From Within*
- ♦ *Creating a Competency-Based Performance Development System*
- ♦ *Design a Personal Development Plan & Enhance Your Performance*
- ♦ *Achieving Peak Performance: Managing, Developing & Retaining Your Staff*

How can I succeed as a supervisor? If you are a new supervisor, or expect to be promoted soon to a supervisory role, this seminar is for you. This seminar will help you assess your strengths and development needs in supervising people, give you best practice models of supervision, and help you produce an action plan for strengthening your supervisory skills back on the job.

Clinical Management Tools for Implementing New Programs Using Evidence-Based Practices

Seminar Agenda:

- ♦ *An Introduction to Evidence-Based Practices (EBP)*
- ♦ *How to Select & Implement Evidence-Based Practice*
- ♦ *Examples of Revising Evidence-Based Practice: Case Studies Illustrate the Potential of EBP*
- ♦ *How to Work With Professionals & Your Organization, Around New Evidence-Based Practices*

How can I prepare my organization for the demand from payers to demonstrate the value of our clinical services and adopt new models of practice? You need a step-by-step approach for restructuring clinical operations to an evidence-based practice (EBP) model. This seminar will give you practical skills and tools to manage the process. The seminar will also give you an update on the status of evidence-based practice models in the field.

Developing a Winning Strategic Plan: A Structured Approach to Maximizing Resources to Achieve Your Organizational Objectives

Seminar Agenda:

- ♦ *Strategic Planning: A Structured Approach to Deploying Resources to Achieve Your Organizational Objectives*
- ♦ *Strategic Planning, Target Costing & Value Engineering: Developing a Cost Metrics- Based Approach to Organizational Strategy*
- ♦ *Integrating Technology Planning in Your Strategic Planning Process*

How do I develop an effective strategic plan - a plan that serves as a practical management roadmap for accomplishing our organizational objectives? Learn both "best practice" and field-tested models from *OPEN MINDS* at this small group, one-day seminar which provides you with the planning tools you need to launch a planning initiative, introduces you to critical target costing concepts, and provides case studies of technology solutions to strategic challenges.

Developing Effective MR/DD Care Management Systems: New Tools for System Development

Seminar Agenda:

- ♦ *Defining Care Management in the Current Environment*
- ♦ *Steps in Developing a Population-Based Care Management System*
- ♦ *Tools for Creating a Population-Based Care Management System*
- ♦ *Keys to Successful Implementation of a Population-Based Care Management System*

EXCELLENT SEMINAR!

- 2008 Seminar Attendee

How do I make the most of the dollars we have to provide MR/DD services? The convergence of person-centered planning, self-determination, and shrinking budgets have increased the interest in new models for managing care delivered in MR/DD service systems; yet most professionals in the field have received no training on data-based and tool-based approaches to implementing such a system. This seminar gives you an overview of models to make the transition from patient management to population management. Our one-day seminar focuses on the principles and practices of care management, person-centered planning, and self-determination, and gives you the tools to start the redesign of your service system. You will learn about best practices in case management for MR/DD service systems.

Fine-Tuning Your Compliance Operations: Best Practices in HIPAA, OIG & Sarbanes-Oxley Compliance

Seminar Agenda:

- ♦ *A Framework for Success: Recommended Elements of a Formal Corporate Compliance Program*
- ♦ *HIPAA Privacy & Security Standards - Where You Are & Where You Should Be*
- ♦ *New Developments in OIG Compliance*
- ♦ *The Sarbanes-Oxley Act of 2002: Understanding the Rules & Ensuring Compliance*

The presenter was very knowledgeable, interesting and had a great sense of humor. Kept the audience's attention throughout- great job!

- 2008 Seminar Attendee

Does your organization have an effective corporate compliance program? Would you pass a formal review? Understanding HIPAA, Sarbanes-Oxley, and your organization's compliance with these regulations can be challenging. Implementing an effective corporate compliance program in line with the Office of Inspector General's (OIG) recommendations takes time and careful planning. This seminar gives you all the information you need for developing and maintaining an effective corporate compliance program.

Increased Responsibility & Accountability for Non-Profit Boards

Seminar Agenda:

- ♦ *Trends Shaping the Role of Non-Profit Organizations in the Child Welfare & Social Service Fields*
- ♦ *Playing by the Rules: Building an Effective Corporate Compliance Program*
- ♦ *Ensuring Accountability: Best Practices in Compliance & Performance Reporting*
- ♦ *Best Practices in Board Governance*

Is your organization in compliance with all the rules and regulations that it must comply with – from state and local to HIPAA and Sarbanes-Oxley? Board directors are ultimately accountable for the organizations they govern – from ensuring compliance with the law to achieving strategic objectives. This seminar gives you all of the information you need to understand how compliance programs and strategic performance measurement can be used as tools by boards to effectively govern and prepare for success in the future.

Performance-Based Contracting in Children's Services: How to Structure Private & Public Sector Responsibility in System Accountability

Seminar Agenda:

- ♦ *Industry Trends in Performance-Based Contracting*
- ♦ *Designing a Private/Public Partnership*
- ♦ *A Case Study in Performance-Based Contracting: The Kansas Child Welfare Public/Private Partnership in System Accountability*
- ♦ *Measuring the Results of the Partnership*

Privatization of child welfare services and the federal government's Child and Family Service Reviews have dramatically impacted how the field demonstrates success with children's services. Even though the changes have mandated increased accountability, there is an opportunity to enhance credibility for the entire industry. Performance-based contracting clearly defines the roles and responsibilities of the private and the public sector. An effective partnership results in improved outcomes in safety, well-being, and permanency for children and families.

Reinventing Your Service Delivery System: How to Build a Children's Continuum of Care Model for the Future

Seminar Agenda:

- ♦ *The Current & Future Industry Trends for Children's Services*
- ♦ *Assessing Organizational Readiness to Develop a Continuum of Care & Accept Risk*
- ♦ *Using Technology to Support Operations*
- ♦ *Clarifying & Designing a Successful Change Management Process*

Throughout the country, children's service delivery systems are reengineering due to changing financing models, which require risk management skills and performance-based outcomes for funded services. The emerging service delivery system will require providers to streamline their business processes and make investments in technology to have access to real-time information in meeting the performance standards and managing the risk inherent in the new financing models. This seminar will address the industry trends and focus on how organizations can assess their readiness for the change and define approaches to successfully reinvent the services delivered to meet the demands of the new funding environment.

Service Integration in Children's Services: How to Create Successful Partnerships With Other Service Delivery Systems

Seminar Agenda:

- ♦ *The Current & Future Industry Trends for Children's Services & Why They Lead to Considering Service Integration*
- ♦ *The Elements of Integration & Collaborative Models Financing, Clinical Services & Information*
- ♦ *The Elements of Integration & Collaborative Models Financing, Clinical Services & Information (continued)*
- ♦ *Collaborative Management Models for Improving Economies of Scale & Achieving Service Integration: A Look at Cooperative Models in Place in the Field*

As funding streams decrease and expectations increase, the service community is seeking new approaches in efficiently delivering services. Strategic partnerships are emerging with educational institutions, public sector providers, behavioral health, child welfare, and community-based agencies. Enhancing customer service, maximizing agency resources, and improving performance outcomes are the results of these new approaches. A strategic partnership is not a collaboration; this seminar will define the distinctions and provide examples of successful service integration partnerships.

Surviving & Thriving in a Recession: A Management Blueprint for Health & Human Services

Seminar Agenda:

- ♦ *Trends Shaping the Recession Marketplace in Health & Human Services*
- ♦ *"Management Musts" for Surviving Harsh Economic Times*
- ♦ *Market Opportunities in This Turbulent Economy*
- ♦ *Service Models Emerging in the Post-Recession Health & Human Service Market*
- ♦ *Preparing for the Post-Recession Marketplace*

OPEN MINDS did an excellent job. The information was needed and was easy to understand.

- 2008 Seminar Attendee

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 us for a look at these key trends and the implications for organizational revenue and margins.

The Clinician Manager: An Intensive Training Experience for New Managers

Seminar Agenda:

- ♦ *From Clinician to Manager*
- ♦ *The Leadership Management Model*
- ♦ *The Leadership Management Model (continued)*
- ♦ *Skills for Effective Management*

The necessity for effective supervisory skills for behavioral health care and social service managers is now more important than ever. Unfortunately, many human service supervisors are promoted into management positions because of their superior clinical skills and have had little training in management and supervision. This seminar focuses on the necessary supervisory skills for effective behavioral health care and social service supervisors. It explores the differences between the role of clinician and manager, and the skills and techniques necessary for effective leadership and supervision. The presentation will blend theory and practical application, will be highly interactive, and will include handouts.

XII. Strategic Management Web Briefings

1. Assessing Organizational Readiness to Develop a Continuum of Care & Accept Risk-Based Contracts

Throughout the country, children's service delivery systems are reengineering due to changing financing models, which require risk management skills and performance-based outcomes for funded services. The emerging service delivery system will require providers to streamline their business processes and make investments in technology to have access to real-time information in meeting the performance standards and managing the risk inherent in the new financing models. This session will focus on understanding risk models for children's services, fiscal & operational preparedness for developing a continuum of care, and clinical preparedness for developing a continuum of care.

2. Best Practice Models in New Venture Business Planning

Most provider organizations are finding it necessary to "reinvent" traditional services and create new services in order to prevent obsolescence and maintain financial viability. But few have an organized process for deciding what new markets to enter and, upon making that decision, how to plan for the new venture. In this information-packed session, we will walk through a structured process for analyzing and ranking new business opportunities – and an outline for a successful business planning process.

3. Collaborative Management Models for Improving Economies of Scale & Achieving Service Integration: A Look at Cooperative Models in Place in the Field

As funding streams decrease and expectations increase, the service community is seeking new approaches in efficiently delivering services. Strategic partnerships are emerging with educational institutions, public sector providers, behavioral health, child welfare, and community-based agencies. Enhancing customer service, maximizing agency resources, and improving performance outcomes are the results of these new approaches. A strategic partnership is not a collaboration. This session will focus on understanding risk models for children's services, including integrated financing and risk-based contracting; fiscal and operational preparedness for developing a continuum of care; and integrated clinical services – clinical preparedness for developing a continuum of care.

4. Creating an Enhanced Recovery-Oriented System of Care

This session will assist clinical and administrative executives with creating the elements of a recovery-oriented system of care that provides consumers with the best of new clinical practices. Executives will learn how to build clinical delivery systems that bring state-of-the-art care to consumers; adopt new clinical technologies to current delivery systems; and assure that the full benefits of new psychotropic medications are realized in the mental health system.

5. The Futurists' View of Health & Human Services: A Briefing & Executive Exercise in Strategic Planning

The future is only the present not yet lived. And with the necessary business acumen, an organization can strategically position itself for a future of market maximization. Learn how to link insightful assessment of the external business landscape with the awareness of how money can be made – and the ability to execute a strategy to deliver the desired results. From futurists' perspectives to an exercise in business acumen, this executive briefing will shed light on the future of behavioral health.

6. 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.

7. How to Select & Implement Evidence-Based Practices

Preparing your organization for change in order to keep up with the demand from payers to demonstrate the true value of your clinical services is essential for future success. In this session, you will learn new models of practice, by a step-by-step approach for restructuring clinical operations to an evidence-based practice (EBP) model. This briefing will present the practical tools necessary for implementing evidence-based practices within your organization.

8. Human Capital Management: Assessing Team Competencies & Ensuring That You Have the Right Team Through Employment Development & Succession Planning

As competition for skilled labor increases and jobs become more complex, organizational leaders continue to search for ways to maintain strong employees and to build competent management teams at all levels. This session provides participants with advice on how to assess current staff skills, how to use succession planning as an employee/team development tool, and how to build strong management teams that will survive (and contribute to) organizational planning.

9. Managing Care Across the Continuum: Keys to Success in Managing an Integrated Clinical System

Managing an integrated clinical system requires designing a continuum of care that is well positioned strategically, implementing the design effectively, and getting paid for the services. Seamless continuity of care as people move through the continuum has often proven an elusive goal of system reform efforts. To be successful, clinical leaders need practical tools that integrate and align clinical practice, operations and payer requirements. During this presentation, you will learn about the key features of a well-functioning continuum of care, and how to use level of care criteria as the framework for operational and clinical decision-making that will meet the requirements of managed care payers.

10. Managing Stress & Change: A Guide to Coping With Change for Front-Line Staff

Change is constant and everywhere and more rapid than ever. This briefing is designed for front-line staff – those folks who see our consumers every day. It is focused on understanding the forces driving change in today's environment and the reactions to change that we are likely to see in our coworkers and the consumers that we serve. The purpose of this session is to develop an understanding of how to remain effective in your role in the midst of changes through the use of stress management tools and techniques.

11. 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.

12. **A Model for Developing Outpatient Services for Consumers With Dual Diagnosis**
In many markets, developing outpatient services for complex consumer populations is a key diversification strategy. Consumers with a dual diagnosis of a mental illness and an addiction are one such example. Join us as we share a model (and experience) in developing such a program.
13. **Portfolio Analysis as a Tool for Resolving Profitability & Mission Issues**
If only we had unlimited funds! Just think of the programs and services that could be provided if money were not an issue. But the reality is that strategic initiatives and program decisions of many organizations are driven by funding and profitability issues. In this information-packed session, discover how using portfolio analysis can help you look at what services your organization should provide and learn how to decide where to allocate your resources.
14. **The Role of Medical Directors & Clinical Directors in Measuring & Improving Clinical Performance**
The performance of clinical programs and services is coming under increasing scrutiny by regulators, payers and consumers. At the same time, increasing financial pressures limit the resources available to support clinical programming. Clinical leaders must simultaneously make the most effective and efficient use of all available resources while measuring the impact of operational and financial decisions on clinical outcomes. During this presentation, you will learn how to think about your organization as a system, how to use Statistical Process Control and other CQI tools to measure and improve performance without micromanaging.
15. **Service-Line Decision-Making & New Service Development: Tools for Evaluating Your Organization's Service Portfolio & Assessing New Service Opportunities**
How does your organization decide which services to continue, and those to terminate? How does the organization evaluate new services? Is due diligence through market research and seeking alignment with your current business plan part of your process? How do you test and develop these proposed new services? For an update on tried-and-tested approaches to service line evolution, you need this informative web seminar.
16. **Strategic Planning: A Structured Approach to Deploying Resources to Achieve Your Organizational Objectives**
This executive briefing 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.
17. **Strategic Planning in an Evolving Environment: Trends Shaping Organizational Strategy in the Behavioral Health & Social Service Field**
When it comes to the financing and delivery of behavioral health and social services, we are in the midst of a "perfect storm." On one hand, cost pressures and financing policy are pushing integration and risk-based contracting. On the other, consumer preference and technologies push community-based care delivery. Executives are working on plans to begin the integrated, risk-based service system with consumer-centric 'high-value' community-based model that payers and consumers want. This session provides an overview of this paradigm shift and introduces participants to the current trends and changes that are shaping the strategy of all organizations in the behavioral health and social service field.
18. **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 us for a discussion of short-and-long-term strategies for achieving and maintaining profitability.

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

Smart leaders pay attention to trends that might influence the future. Understanding, appreciating, and anticipating these trends are crucial to the survival of any behavioral health and social service organization. Early identification of trends, drivers, and issues gives you a significant edge over competitors, allows you to take advantage of new opportunities, and helps you steer clear of approaching disasters. Join us for this always-popular update on industry trends, Federal initiatives and their impacts and opportunities assembled by the *OPEN MINDS* team.

20. Unique Challenges of Evolving from Clinical Professional to Clinical Manager

The necessity for effective supervisory skills for behavioral health care and social service managers is more important now than ever. Unfortunately, many human service supervisors are promoted into management positions because of their superior clinical skills, and have had little training in management and supervision. This session focuses on the necessary supervisory skills for effective behavioral health care and social service supervisors. It explores the differences between the role of clinician and manager, and the skills and techniques necessary for effective leadership and supervision.

21. Using the Balanced Scorecard to Create an Execution Premium

Corporate performance management is the key to an organization's success. Most organizations struggle with how to execute strategy. In this presentation, faculty will demonstrate how to make strategy execution a core competency and create a competitive advantage. The Balanced Scorecard, developed by Harvard Business School Professor Robert S. Kaplan and his co-author, David P. Norton, translates a company's vision and strategy into a coherent set of performance measures. The presentation will illustrate how using the Balanced Scorecard concepts can lead to a strategy-focused, successfully executed strategy and achieving breakthrough performance results.