MANAGEMENT & EXECUTIVE
EDUCATION PROGRAMS

Market Intelligence & Best Practice Management Training For Health & Human Service Executive Teams

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OPEN MINDS
MANAGEMENT & EXECUTIVE EDUCATION PROGRAMS

OPEN MINDS Management & Executive Education Programs 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 programs cover six key domains – the first focusing on the latest trends and market intelligence present in one concise session; the others are five core management competency areas. These six domains are described briefly in the sections that follow and in the chart below:

OPEN MINDS Six Management Domains

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**Next Generation Market Intelligence Updates**

*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*.

**Seminars:**

- The Ambient Assisted Living Services Market: The Next Generation In Services For The Mature Adult Market
- The Changing Federal Funding Landscape & Its Implication For The Behavioral Health & Social Service Field
- The Evolving Behavioral Health Market Space: A Look At Emerging Successful Service Models
- An Executive Briefing On
- Trends In Managed Behavioral Health Programs
- An Executive Update On
- The Public Mental Health System
- An Executive Update Of U.S. Financing Of Health & Human Services: Past, Present, & Future
- Planning For The Next
- Generation Of Behavioral Health & Social Services: A Futures Briefing

**Web Briefings:**

- Better Performance = Competitive Advantage: A New Equation For Today’s Health & Human Service Market
- The Challenges & Opportunities Facing Leaders In Tumultuous Times
- The Changing Paradigm For Health & Human Services – The Trends Shaping Planning For Today & The Future
- The Current & Future Industry Trends For Children's Services
- Emerging Market Models For Behavioral Health & Human Service Care Delivery Organizations – Post-Recession Market Models & Their Management Implications
- Emerging Market Models For Behavioral Health & Social Services - The Financial & Technology Implications You Should Plan For
- 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
- 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 Evolving World Of Medicaid & Medicare: How New Policies & Regulations Are Shaping The Market For Providers
- The Good, The Bad, & The Ugly: How New Medicaid Rules Affect Your Service Delivery
- The Impacts & Implications Of The Recession On State & Local Budgets
- Industry Trends In Performance-Based Contracting
- The Informatics Advantage
- The New Financing & Customer Dynamics In The Behavioral Health & Social Service Field: Drivers Of Future Organizational Strategy
- The New Technology & Your Consumers: An Update On Emerging Technologies & Their Effect On Competition In The Behavioral Health & Social Service Market Space
- Technology As The Next Disruptive Innovation In Behavioral Health: How Consumerism & Technology Will Define Our Future Market Model In The Decade Ahead
The Ambient Assisted Living Services Market: The Next Generation in Services for the Mature Adult Market

There is a lot of discussion on 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.
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.

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

“The information in the OPEN MINDS presentations was awesome!”
- 2008 Seminar Attendee
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.

AGENDA

- 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 BRIEFING ON TRENDS IN MANAGED BEHAVIORAL HEALTH PROGRAMS

The behavioral health market space is in a constant state of change. Our seminar includes an update on 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.

ONE-DAY 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
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.

AGENDA

- 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

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.

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
PLANNING FOR THE NEXT GENERATION OF BEHAVIORAL HEALTH & SOCIAL SERVICES: A FUTURES BRIEFING

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.

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

LEARNING OBJECTIVES

- A Statistical Update On Demand, Rates, & Service Supply Issues
- Discussion Of Current Trends – In Financing, Policy, Regulation, Demographics, Technology, & More – In Terms Of How They Affect Service Delivery, Competition, & Profitability
- Discussion Of The Outlook For Care Management & Service Delivery Organizations, Along With A Forecast For Rates, Consumer Demand, Funding Sources, Competition, & Profitability
BETTER PERFORMANCE = COMPETITIVE ADVANTAGE: A NEW EQUATION FOR TODAY’S HEALTH & HUMAN SERVICE MARKET

In this closing session, OPEN MINDS will explore how the use of information systems and metrics based management can improve your organization’s performance and help you to gain the competitive advantage in today’s health care market.

AGENDA

- The Importance Of Data And Metrics In Today’s Health Care Market
- The Role That Finance, Human Resources, And Compliance Management Play In Shaping An Organization’s Performance In The Market
- The Keys To Success For Your Organization In A Competitive Environment
THE CHALLENGES & OPPORTUNITIES FACING LEADERS IN TUMULTUOUS TIMES

To grow and thrive in an ever-challenging business climate, leaders need great ideas they can use today. Over the next three days we will be focusing on the leadership skills and ideas you need to succeed. Understanding the market and the changes needed is a critical first step for leaders. A member of the OPEN MINDS team provides an executive briefing on dynamic industry change drivers and the required infrastructure and talent necessary to keep pace with the industry.

WEB BRIEFING

AGENDA

- Understanding The changing Health And Human Service Market
- Implications Of The Health Care Reform And Parity Legislation
- Trends In Leadership Recruitment, Retention And Compensation
- Leadership Implications Of The Changing Market
THE CHANGING PARADIGM FOR HEALTH & HUMAN SERVICES – THE TRENDS SHAPING PLANNING FOR TODAY & THE FUTURE

A changing environment economic environment is an opportunity – to both maintain and improve your fiscal viability and to position your organization for the challenges of tomorrow. This strategic check-up will give you an overview of the cutting edge market intelligence about the technology, finance, and trends shaping the services for consumers with chronic and complex conditions, and the emerging market models for success in years ahead. Short-and-long-term strategies for achieving and maintaining profitability will be discussed.
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 how the impact on the provider community drives the need for integration through collaboration.

AGENDA

- The Change In Funding Streams
- The Shift From Process Outcomes To Performance-Based Outcomes
- The Impact On The Provider Community Drives The Need For Integration Through Collaboration
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.

AGENDA

- Drivers Shaping The Post-Recession Market – Economic Turbulence Speeds Existing Trends
- Post-Recession Market Models For Specialty Care Delivery Organizations – Made By The Market
- The Managmeent Implications Of These New Market Models – The Market Made Me Do It
- Five Strategic Questions Your Management Team Should Consider – A Long Look In The Mirror
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? Our briefing includes 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.

WEB BRIEFING

AGENDA

- Disruptive Innovation & The Game-Changing Trends In The Current Market
- Payer Responses To The Shifting Market
- Strategic & Management Issues For Service Delivery Organizations
EVERYTHING YOU WANT TO KNOW ABOUT WHAT IS HAPPENING IN WASHINGTON, D.C., BUT WE'RE 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.

AGENDA
- A Snapshot Of The Current Behavioral Health & Social Service Market
- Parity – Unresolved Issues & Likely Impact
- Market & Management Strategy In This Recession
- Post-Recession Market Models For The Field
EVERYTHING YOU WANT TO KNOW ABOUT WHAT IS HAPPENING IN WASHINGTON, D.C., BUT WE'RE 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. Our briefing includes the most current update on the parity legislation, and the implications for the field.

AGENDA

- A Snapshot Of The Current Behavioral Health & Social Service Market
- Parity – Unresolved Issues & Likely Impact
THE EVOLVING WORLD OF MEDICAID & MEDICARE: HOW NEW POLICIES & REGULATIONS ARE SHAPING THE MARKET FOR PROVIDERS

We’ve seen a lot of policy changes and new regulations from the Centers for Medicare and Medicaid Services (CMS) over the past few years, and as the administration continues to implement the various provisions of the health care reform legislation, you can expect see many more in the years to come. From quality rating systems, to accountable care organizations, to new benefit options – CMS is changing the health care landscape. In the midst of all this chaos, the true question to ask is what are the implications for service provider organizations?

AGENDA

- The Latest Programs And Regulations From The Centers For Medicare And Medicaid Services
- How Changes To Medicaid And Medicare Will Affect Service Provider Organizations
- How Provider Organizations Can Strategically Position Themselves For Success In An Evolving Market
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.

AGENDA

- The Top 10 List – The Most Important Recent Developments Affecting Delivery of Medicaid Services
- Challenges Of Parity For Behavioral Health Provider Organizations
- Strategic Implications Of Emerging Paradigm
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.

WEB BRIEFING

AGENDA

- Effects Of Current Economic Crisis
- Strategic Moves In A Crisis Environment
**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.

**AGENDA**

- Why Is Performance-Based Contracting A Significant Trend?
- What Impact Does Performance-Based Contracting Have On Child Welfare Organizations?
- How Does Performance-Based Contracting Affect Public Sector Payers?
THE INFORMATICS ADVANTAGE

How does your organization move from acquisition of technology as an expense, to acquisition of technology as an investment? The speaker focuses on how to maximize your return from technological investments in EHRs, telehealth, and new treatment technologies. In this presentation, the speaker will discuss the technologies that are disrupting "business as usual" in the health and human service field – and how to identify the market opportunities that will provide a solid return.

AGENDA

- Future Vision Of Health & Human Service Ecosystem
- Three Elements In Play In Health & Human Services . . .
- Four Steps In Strategic Analysis And Critical Thinking
**INNOVATION OR DESTRUCTION: THE FUTURE IS NOW FOR HEALTH & HUMAN SERVICES**

In the modern health and human service market, there are truly only two sustainable options for your organization – innovate or watch your organization languish to a point of destruction. The competitive advantage of most organizations (payers, care managers, and service provider organizations alike) will hinge on their ability to harness new technologies and lead through innovation. How do you make sure your organization has the strategy to succeed?

**AGENDA**

- Trends Shaping The Current Landscape For Organizations Treating High-Cost Complex Consumers
- How To Position Yourself For A Future Filled With Innovation
IS YOUR STAFF READY FOR BUNDLED PAYMENTS & CAPITATED RATES?: RE-ENGINEERING YOUR CLINICAL PROCESSES

Is your staff ready to succeed in an environment of increasing financial risk? A wide variety of new financial models are emerging across the country in health and human services; bundled rates, episode-based payments, case rates, global payments, capitation (and sub-capitation) along with a wide range of pay-for-performance initiatives. Both public and private payers are developing these new financing models as alternatives to fee-for-service (FFS) and cost-based reimbursement mechanisms. Unfortunately, when it comes to these new risk-based and performance-based reimbursement models, there is a degree of complexity—both clinical and administrative—for service delivery organizations that has not existed before.

AGENDA

- Find The Competitive Advantage (And Avoid The Pitfalls) In The New Financing Models
- Reengineer Your Clinical Service Delivery System For The New Reimbursement Environment
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.

WEB BRIEFING

AGENDA

- An Executive Update On Trends In Policy, Financing, & Technologies Shaping The Planning Process
- The Forces Of Evolution & Innovation In The Field – The Possible Post-Recession Market Scenarios
- Preparing For The Post-Recession Market
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.

AGENDA
- U.S. Health Care Spending
- U.S. Human Service Spending
- Mental Health Treatment
- Addiction Treatment
- Child Welfare Services
- Juvenile Justice System
- Corrections Health Care
- Disability Support Services
- Nursing Homes
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.

AGENDA
- What Futurists Predict For Health & Human Services
- Understanding The Changing Health & Human Service Market
- Leadership Implications Of The Changing Market
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.

AGENDA

- An Executive Update On Emerging Technologies
- Examples Of “Early Adapters” Of New Technologies
- Implications Of New Technologies For human Resource Management

LEARNING OBJECTIVES

- Understand The Changing Health And Human Services Market
- Learn Organizational Strategic Options In The Changing Market
- Assess Your Infrastructure And Talent Requirements In This Market
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.

AGENDA

- Technologies That Will Lead The Next Market Disruption In Behavioral Health
- The In-Country Offshoring Effect
- Strategy Issues In Evolving To Technology-Enabled Service Delivery
FINANCIAL MANAGEMENT

OPEN MINDS financial management sessions provide cutting-edge financial management models and financial risk management techniques.

- Budgeting and financial management
- Financial risk management
- Long-term financing and capital planning

SEMINARS:

- Budgeting for Clinical Managers & Supervisors
- Developing Disease Management Programs: Using Population-Based Management Strategies to Create New Market Opportunities
- Maintaining (& Increasing) Your Organization’s Profitability: A Structured Approach to Diagnosing Your Organization’s revenue & Margin Challenges
- Using Target Costing Models to Solve Your Pricing & Cost Management Problems

WEB BRIEFINGS:

- Assessing Your Yield on Current Contracts & Developing Revenue Maximization Strategies
- Behind the Trends: Moving From Market Research to Market Strategy
- Best Practice Models For Unit Costing: Managing & Reducing The Cost Of Service Delivery
- The Challenges & Opportunities of Performance-Based Contracting
- Designing Financial Metrics to Manage in a Competitive Environment
- Estimating & Achieving a Positive ROI from EHR Adoption: The OPEN MINDS EHR ROI Model
- The Evolving Treatment Foster Care World: Trends Affecting Your Organizational Revenue & Margins
- Executive Briefing on Tax Exempt vs. Non-Profit Issues
- Executive Guide to Budgeting & Budget Management
• Financing Your New Market Opportunities: Sources of Funding for Growth
• The Four-Step Model for Metrics-Based Management: Improving the Bottom Line with Better Use of Data
• How to Re-Structure Clinical Operating Processes to Increase Productivity & Decrease Costs
• Information Technology Budgets: How Much Should You Spend?
• Maintaining (& Increasing) Your Organization’s Profitability: A Structured Approach to Diagnosing Your Organization’s Revenue & Margin Challenges
• Managing Consumer Demand for Services on a Fixed Budget: Developing a Budget Tool for Uncompensated Care
• Maximizing Your Medicaid Billing & Collections – Improved Processes for Both Fee-For-Service & Managed Care
• Meeting Unlimited Demand with Scarce Resources: Developing a Budget Tool for Uncompensated Care
• Metrics-Based Management: Benchmarking, Performance Targets, & Management Dashboards
• Metrics-Based Management: Key Performance Indicators
• Metrics-Based Management: Using Data to Enhance Quality of Care & Operations
• A Model for Calculating Your Return-on-Investment When Investing In Technology
• Performance-Based Compensation: Tying Employee Compensation to Organizational Performance
• Risk-Based Contracting: The Challenges & the Opportunities
• Risk Management for Psychiatric Medical Directors & Administrative Psychiatrists: What You Need to Know to Do Your Job Well & Stay Out of Trouble
• Understanding & Enhancing the Role of Your Organization’s Medical Director: Making Your Investment in a Medical Director a Value-Added Proposition
• Update on Reimbursement for E-Health: Making E-Health Services Add to Your Bottom Line
BUDGETING FOR CLINICAL MANAGERS & SUPERVISORS

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.

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
**DEVELOPING DISEASE MANAGEMENT PROGRAMS: USING POPULATION-BASED MANAGEMENT STRATEGIES TO CREATE NEW MARKET OPPORTUNITIES**

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.

**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
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 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.

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?

LEARNING OBJECTIVES

- Examine The Common Management Situations Contributing To Declining Contract And Organizational Profitability-And Discover Common Solutions That Actually Work
- Learn How To Maximize Service Line As Well As Contract Revenue And Profitability
- Develop A Strategic And Tactical Approach To Organizational Revenue Diversification

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.

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

LEARNING OBJECTIVES

- Basic Components of an Information Technology Budget - Hardware, Software, Staff & More
- Data Benchmarks on Technology Spending
- An ROI Analysis Model for New Technology
- Case Examples of ROI Analysis

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

- 2008 Seminar Attendee
USING TARGET COSTING MODELS TO SOLVE YOUR PRICING & COST MANAGEMENT PROBLEMS

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.

AGENDA

- 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
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.

WEB BRIEFING

AGENDA

- The Three Keys For Revenue Diagnostics – Current Contract Revenue Macimization, Contract Profitability Management & Revenue Diversification
- Key Strategies For Maximizing Revenues And Increasing Profitability
- Manage Unit Cost
- Revenue Maximization Strategies
BEHIND THE TRENDS: MOVING FROM MARKET RESEARCH TO MARKET STRATEGY

The future is only the present not yet lived. And with the necessary business acumen, an organization can strategically position itself. Learn how to link an understanding of these trends with your financial and information technology planning to deliver the best outcomes for your organization.

AGENDA

- Estimating The Effects Of Market Trends On Your Organization
- Implications Of Disruptive Innovation On Organizational Strategy
- How To Apply Market Intelligence To Your Financial And Technology Planning
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.

AGENDA
- Understanding The Fundamentals Of Unit Cost
- Target Costing
- Managing Your Costs
- Building A Foundation For Organizational Improvement

LEARNING OBJECTIVES
- Understand The Difference Between Traditional Costing And Unit Costing
- Understand How To Use Unit Costing As A Management Tool For Continuous Process Improvement
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.

AGENDA

- Understanding The Impact Of The Recovery Model
- The New Psychotropics & The Recovery Model
- The Return-On-Investment Of The Recovery Model
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.

AGENDA

- An Executive Update On Performance-Based Contracting Models
- Case Studies On Pay-For-Performance
- Understand The Critical Organizational Competencies Required For Success In A Pay-For-Performance Environment
DESIGNING FINANCIAL METRICS TO MANAGE IN A COMPETITIVE ENVIRONMENT

The right performance measurement metrics are critical for an executive team to manage effectively in a competitive environment. What are the essential metrics that your organization needs? How do you use these to manage day-to-day operations and lead change? During this presentation, you will be introduced to the essential components of metrics-based management and practical applications.

AGENDA

- How Do You Develop Financial Metrics?
- Using Metrics To Guide Change
- Examples Of Industry Best Practice In Financial Metrics
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.

AGENDA

- Common Technology Adoption Issues In The Behavioral Health Field
- The Need To Integrate IT Planning With Organizational Strategic Planning
- ROI Analysis Of Technology Investments As A Strategic Planning Tool
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.

AGENDA

- The Evolving Treatment & Payment Paradigm
- Key Factors In The Treatment Foster Care Market
- The Three Keys For Revenue Diagnostics – Current Contract Revenue Maximization, Contract Profitability Management, & Revenue Diversification
EX大面积CUTIVE 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.

AGENDA

- Should Your Organization Be Considered Tax Exempt?
- Proving Your Organization’s Tax Exempt Status
- A Look At Recent Federal, State And Local Government Rulings
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.

AGENDA

- Understand The Terminology And Structure Of A Typical Budget
- Understand The Advantages Of Various Budgeting Approaches
- Define Typical Components Of The Budgeting Process
- Understand The Features Of Typical Budgeting Software
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 you’re your 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.

AGENDA

- An Overview Of The Sources Of Investment & Development Capital
- Determining Your Capital Requirements
- The Process Of Securing Capital For Your New Venture -- Tools You Need
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.
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.

WEB BRIEFING

AGENDA

- Creating & Using Management Accounting Information To Better Manage Organizational Performance & Maximize Mission Effectiveness
- Case Examples Of Performance Data Reporting
- How "Value" & Performance Can Be Positively Balanced Within A Mission-Driven Organization
- Closing The "Metrics Communication Gap" Between Social Service Executives & Financial Executives
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.

AGENDA

- Defining Productivity And Production Benchmarks
- Measuring Productivity: Steps In The Process & Models
- Using Productivity Measures In The Supervision Process
- The Question Of Production-Based Compensatio
**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.

**AGENDA**

- Business Needs Analysis
- Vendor Selection Process
- Planning For Successful Implementation
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.

AGENDA

- The ‘How-Tos’ For Maximizing Contract Revenue
- Service Line & Contract Profitability Management – It Is Possible
- Taking A Strategic & Tactical Approach To Organizational Revenue Diversification
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.

AGENDA

- Issues In Managing Demand For Services On A Fixed Budget
- The Key Components Of A Budgeting Tool For Managing Consumer Demand On A Fixed Budget
- An Example Of A Budgeting Approach For Uncompensated Care
- Organizational Implications For Proactive Management Of Demand For Fixed-Budget Services
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.

AGENDA

- Basics Of Revenue Maximization
- Seven Key Strategies For Maximizing Revenues
- Ten RevMax Principles
MEETING UNLIMITED DEMAND WITH SCARCE RESOURCES: 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. Whether for-profit or non-profit learn an approach to developing an actuarial budget tool for uncompensated care and how this methodology can be applied in your organization.

AGENDA

- The Key Components Of The Budgeting Tool For Uncompensated Care
- Projecting Consumer Demand & Developing Budgeting Scenarios
- Applying A Budgeting Tool To Your Organization
**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.

**AGENDA**

- Learn The Process Of Defining Benchmark Targets
- Develop Benchmarks For Your Own Organization
- Understand Setting Baselines And Tracking Progress
- Using Dashboards To Track Progress
**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 organization’s strategic objectives and allow your management team to take timely corrective action if needed.

**Web Briefing**

**AGENDA**

- How To Use Management Metrics
- Steps In Designing Management Metrics And Performance Reporting Systems
- Five Steps For Developing Key Performance Indicators
- Examples Of Reporting Used For Metrics-Based Management

**LEARNING OBJECTIVES**

- How To Use Metrics-Based Management Principles
- Tracking The Progress Of Your Strategic Plan
- Using Key Performance Indicators
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.

AGENDA
- The Four Cornerstones Of Metrics-Based Management
- Routine Reporting
- Key Performance Indicators
- Benchmarking & Performance Targets
- Management Dashboards
- Building Information Literacy

LEARNING OBJECTIVES
- Learn About The Four Cornerstones Of Data To Drive Innovation, Enhance Care Quality And Improve Operational Performance
- Know How To Go Beyond Routing Reporting To Gather Key Operational And Strategic Performance Metrics
- Learn How To Build Information Literacy With Your Staff
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.

WEB BRIEFING

AGENDA

- Technology Spending In Today’s Behavioral Health & Social Service Market
- Basic Components Of An Information Technology Budget
- Staffing Your Technology Needs
- Sample Cost Information For Technology Acquisitions
- Incorporating Return-On-Investment Analysis Into Your Budgeting Process
- Case Studies

LEARNING OBJECTIVES

- The Difference Between Return-on-Investment Models
- Quantitative/Qualitative Decision Points In Technology Investments
- How To Calculate Return-On-Investment
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.

AGENDA

- An Executive Update On Productivity Measurement & Performance-Based Compensation
- Measuring Productivity: Steps In The Process & Models
- Using Productivity Measures In The Supervision Process
- The Question Of Production-Based Compensation
Risk-based and pay-for-performance contracting models are increasingly common for both public and private sector payers. These contracts can present both opportunities and threats for provider organizations, and require management information tools and specific management competencies. Join us to learn the practical “do’s and don’ts” for success in pay-for-performance contracting.

**AGENDA**

- Pay-For-Performance Contracting
- At-Risk Contracting
- Implications For Management Systems And Practices
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.

AGENDA
- Overview Of Current Trends
- Risk Management, Patient Safety, Compliance & Ethics
- Role Of Clinical Leadership
- Practical Approach To Minimizing Risk & Maximizing Safety
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.

AGENDA

- Overview: What Are The Issues?
- Survey Of Current Experience
- National Professional Guidelines
- Generic Job Description
- Physician Leadership
- Becoming A Medical Director
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.

AGENDA
- The Driving Forces Behind Innovation
- State Health Information Technology (HIT) And Health Information Exchange (HIE) Activities
- Emerging Best Practices And Reimbursement
- Implications For Providers

LEARNING OBJECTIVES
- Learn About “E-health” And health care Practices Supported By Electronic Processes And Communications, Including Health Information Technology (HIT).
- Discover How Electronic Health Information Exchanges (HIE) Can Significantly Improve Health Care Delivery And Quality And Reduce Costs.
- Find Out How States Are Promoting E-Health Policies And Initiatives, Encouraging A Wide Variety Of Public And Private Sector Efforts, And Providing Reimbursement For Technology Improvements.
TECHNOLOGY & INFORMATION MANAGEMENT

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.

SEMINARS:

- How Much Is Enough? Evaluating Strategic Technology Investments
- How To Select An Information System & Write A Contract To Assure Successful System Implementation

WEB BRIEFINGS:

- Adding Telehealth Services To Your Consumer Service Lines
- Best Practice In Software Selection: An Enhanced Approach To Software Selection For Behavioral Health & Social Services Organizations
- Complex Software Implementation Planning & Execution
- Dashboards, Benchmarking & More: Real-Time Information For Organization Performance Improvement
- Defining Your Key Performance Metrics
- Developing A Performance Scorecard
- Ehr From Plan To Reality: Best Practices In Vendor Selection, Contracting, & Implementation
- Emerging Technologies For Cognitive Retraining & Improving Cognitive Functions
- Evaluating Your Data System Reporting Functionality: A Step-By-Step Approach
- High Leverage From Low Tech: Health & Human Service Uses Of Cell Phones, Ipods, Pdas, & More
- How To Develop Functional Specifications For Choosing An Information Technology System
- How Technology Is Creating New Market Opportunities In Community-Based Settings
- How To Get Your Current Electronic Medical Records System To Meet Future Compliance, Reporting & Certification Needs
- How To Link Your Technology Plan To Your Strategic Plan: Using Technology To Solve Your Strategic Management Challenges
• Improving The Effectiveness Of Case Management Through Deployment Of Informatics
• Innovative Treatment Technologies And How They Are Changing Treatment Delivery
• Issues In Estimating & Achieving A Positive Roi From Ehr Adoption: The OPEN MINDS HER ROI Model
• A Look At New Assistive Technologies & How They Are Changing The Field
• Maximizing Clinical Staff Productivity: Using Performance-Based Compensation As A Productivity Tool
• A Model For Calculating Your Return-On-Investment When Investing In Technology
• Models For Expanding Behavioral Health Service Access With Ehealth
• Morphing Your Electronic Records Platform To A Recovery Model In A Consumer-Driven System
• A Look At New Assistive Technologies & How They Are Changing The Field
• Maximizing Clinical Staff Productivity: Using Performance-Based Compensation As A Productivity Tool
• Using Brain Imaging, Brain Mapping, & Cognitive Training Tools To Improve Consumer Care
• Using Informatics To Gather Predictive Information & Select Optimal Clinical Practices
• Using Information Technology To Support Integrated Behavioral & Physical Care
• Tools For Remote Management Of Your Mobile Workforce
• Turning Around Your Lagging Software Implementation: How To Get On Budget & On Schedule With The Reporting You Need
• An Update On Reimbursement For E-Health: Making E-Health Services Add To Your Bottom Line
• Using Technology To Facilitate Consumer Self-Care & Consumer Choice In The Behavioral Health Field
• What Performance Management Metrics Does Your Executive Team Need & How Do You Get Them From Your Current System?
HOW MUCH IS ENOUGH? EVALUATING STRATEGIC TECHNOLOGY INVESTMENTS

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.
**Technology & Information Management**

**One-Day Seminar**

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

**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
**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.

**AGENDA**

- Overview Of The Latest Developments
- Update On Current State Of Adoption
- Implications For Providers
- Future Issues For Consideration

**LEARNING OBJECTIVES**

- An Overview Of E-Health Service Delivery Models Available To Behavioral Health Service Provider Organizations
- Current Telehealth Reimbursement Rates
- Current Regulatory, Licensure & Risk Management Issues To Consider In Launching Telehealth Services
# 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.

## Agenda

- The Software Selection Challenge
- Three Core Vendor Evaluation Factors
- A Seven-Step Best Practice Software Selection Process
**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.

**AGENDA**

- Setting Strategic & Operational Objectives
- How To Build Your Technology Implementation Plan
- Setting The Technology Implementation Timeline
**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.

**AGENDA**

- Defining Key Financial, Clinical, & Operational Metrics
- Selecting The Appropriate Benchmarks
- Using Technology With Balanced Scorecards And Dashboards-The State Of The Art
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.

AGENDA

- Identifying Key Performance Metrics
- Operationally Defining Key Performance Metrics
- Leading Versus Lagging Indicators
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.
EHR FROM PLAN TO REALITY: BEST PRACTICES IN VENDOR SELECTION, CONTRACTING, & IMPLEMENTATION

EHRs are a big investment for any organization, and choosing the right system can make or break your organization. You’ll enjoy this entertaining, yet practical, presentation that takes you through a step-by-step process for selecting an EHR that fits your organization’s needs and the proven practices for effectively and efficiently implementing a new IT system.

AGENDA

- Steps For Vetting Vendors And Their Products And Services
- Contract Negotiation: Ensuring Best Value And Performance
- Key Elements Of An EHR Implementation: Building A Project Plan With Your Vendor And Your Team
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.

WEB BRIEFING

AGENDA

• Defining Cognitive Function & Cognitive Retraining
• Opportunities For Technology Based Improvements
• Current State Of Adoption
• Current Key Uses Of Cognitive Retraining & Improving Cognitive Functions
• Impediments To Adoption Of New Technologies
• Future Issues For Consideration
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.

AGENDA

- Creating A Profile Of Your Performance Data Reporting Needs
- Compliance Reporting Requirements
- Management Reporting Needs
- Assessing Your Available Data To Support Performance Reporting
- Creating Performance Reporting
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, and listserv-based consumer support groups are easy to adopt and use.

AGENDA

- The Advantages Of Low Tech Solutions From The Consumer Perspective
- State Of The Art Applications Of Low Tech Solutions
- Emerging Models
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.

AGENDA

- Business Process Mapping Models For Developing Functional IT Specifications
- A Five-Step Process For Evaluating & Selecting An IT Vendor
- Negotiating Contracts That Support Successful Implementation
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.

AGENDA

- The Technologies Supporting Community-Based Children’s Services
- Technologies Supporting The “Aging at Home” Concept
- The Evolution Of Medicaid To Support Innovative Community-Based Care Programs
- Understand The Technology Substitution Effect- How Technology Can Reduce The Use Of Institutional Care And Support Services
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.

AGENDA

- Defining The Issue
- Current State Of Adoption
- Impediments To Adoption
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.

AGENDA

- The Role Of The CIO In Behavioral Health & Social Service Organizations
- Technology Planning Models That Support Organizational Strategy & Performance
- How To Use Data For Strategic Planning, Performance Monitoring, & Improvement
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.

AGENDA

- Using Information To Manage (& Improve) Clinical Care
- Educating Consumers On The Use Of Health Care Information
- Uses (& Misuses) Of Informatics In The Care Management Process
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.

AGENDA

- Advancement And Evolution In Medicine & Mental Health
- CNS Medical Devices – The Role Of Neurostimulators In Treatment
- Deep Brain Stimulators
- Vagus Nerve Stimulation
- Transcranial Magnetic Transmission
- The ‘Brain Radio’
- Advanced Medications & Novel Drug Delivery Systems
- Emergence Of Long-Acting Therapies
- Role Of Pharmaceuticals Vs. Biotechnology
- Genomic Analysis
- Non-Medication Technologies
- Impediments To Adoption Of New Technology
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.

AGENDA

- Basic Components Of An Information Technology Budget – Hardware, Software, Staff & More
- Data Benchmarks On Technology Spending
- An ROI Analysis Model For New Technology
- Case Examples Of ROI Analysis
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.

AGENDA

- Best Practices In Specialized Technologies Supporting Consumer Self-Service
- The Latest Trends In Home-Based Technologies & Support Services For The Disabled
- Issues With Funding For Assistive Technologies
MAXIMIZING CLINICAL STAFF PRODUCTIVITY: USING PERFORMANCE-BASED COMPENSATION AS A PRODUCTIVITY TOOL

There are a number of factors at play in the field that are prompting behavioral health and social services organizations to enhance their improvement of staff productivity. How does your organization manage productivity standards and evaluate whether to compensate staff based on productivity? Join us for this informative session on what should be measured, how to measure it, and how to put productivity standards to work in the management process.

AGENDA

- Measuring Productivity: Steps In The Process And Models
- Using Productivity Measures In The Supervision Process
- The Issues In Productivity-Based Compensation
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.

AGENDA

- Measuring Productivity: Steps In The Process And Models
- Using Productivity Measures In The Supervision Process
- The Issues In Productivity-Based Compensation
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.

AGENDA

- The Issues Of, & Implications For, Provider Organizations In Implementing Alternative Treatment Technologies
- The Impact Of New Technology On The Therapist: Skills, Attitudes & Adjustments
- Using New Technology To Reach The "Unreachable" Consumer
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.

WEB BRIEFING

AGENDA

- Defining The Key Functionalities Required From Your EMR In A Consumer-Driven System
- Using Your EMR To Support New Treatment Methodologies Such As Concurrent Charting
- Identifying The Key Metrics For A Consumer-Driven System
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.

AGENDA

- The Technology-Substitution Effect - How Technology Can Reduce The Use Of Institutional Care And Support Services
- Examples Of Community-Based Technologies For Consumers With Mental Illness And Developmental Disabilities
- The Evolution Of Funding To Support Innovative Technologies
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.

AGENDA

- Examples Of New Models To Expand Behavioral Health Service Access With Technology
- The Implications For Care Delivery Organizations In Implementing Alternative Treatment Technologies
- The Impact Of Technology On Therapists: Attitudes And Required Skill Set
NEW TECHNOLOGY OPTIONS AND HOW TO LINK TECHNOLOGY TO YOUR STRATEGIC PLAN

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. The speaker will lead you through the steps in the technology planning process and wrap up with some case examples of technology planning.

WEB BRIEFING

AGENDA
- Linking Your Strategic Plan To Your Technology Plan: A Best Practice Model
- Steps In The Technology Planning Process
- Lessons Learned From The Implementation Of New Information Infrastructure
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.

**AGENDA**

- Electronic Health Records - The State (And Cost) Of The Art
- Current Uses (And Savings) From EHR - Models For Assessing Their Impact
- EHR - Current & Future Strategies To Leverage EHR Investments
OVER BUDGET, BEHIND SCHEDULE, & STILL NO REPORTS: AN APPROACH TO TURNING AROUND A SINKING SOFTWARE IMPLEMENTATION

Organizations commonly under-budget implementation & training costs for their information system; and inadequate software implementation usually costs more than if it were appropriately budgeted & planned for from the beginning. Learn how your implementation team can develop a comprehensive understanding of your organization’s needs in order to do the system set-up correctly. Sometimes software implementation needs to be redone from the start to fix problem “set-ups.”

AGENDA

- Common Problems In Implementing New Software
- Step-By-Step Approach To Assessing Your Implementation Software
- Beyond Basics - Moving From Implementation To Maximizing Your System Investment
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.

AGENDA

- What Is ROI Of Technology?
- Why Is ROI Of Technology Important?
- Information Technology Spending
- Typical Technology Budget Components
- Considerations In An ROI Analysis
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.

AGENDA

- Optimizing Your Investment In Electronic Health Records
- Best Practices In Selection, Preparation And Implementation
- Post-Implementation Improvement And Preparing Future Standards
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.

AGENDA

- Defining The Issue
- Current Key Uses
- Current State Of Adoption
- Opportunities For Technologically-Based Improvement
- Impediments To Adoption
- Future Issues For Consideration
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.

AGENDA

- Examples Of The Latest Mobile EMR Technologies
- Tools For Moving To, And Managing, A Mobile Technology-Based Culture
- Future Developments In Mobile Technology
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.

AGENDA

- Common Problems In Implementing New Software
- Step-By-Step Approach To Assessing Your Implementation Software
- A Checklist Of Technology Implementation Symptoms
- Using Technology To Improve Productivity
- Improving Billing & Collections Functionality
- Making The Most Of Technology To Reduce Costs Of Compliance & Licensure
- Creating Performance Metrics Reporting – Clinical & Financial – To Improve Organizational Performance
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.

WEB BRIEFING

AGENDA

- The Driving Forces Behind Innovation
- State Health Information Technology (HIT) And Health Information Exchange (HIE) Activities
- Emerging Best Practices And Reimbursement
- Implications For Providers
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.

Agenda

- An Overview Of The Latest Developments In Brain Imaging And Brain Mapping
- The Latest Development In Cognitive Training Current Consumer-Driven Practices, Models, & Tools
- The Implications For Behavioral Health Care Providers
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.

AGENDA
- Using Information To Manage And Improve Clinical Care
- Using Information For Modeling And Forecasting
- The Range Of Uses For Clinical Informatics
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, 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 policymakers 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.

WEB BRIEFING

AGENDA

- Current Landscape With Respect To Pay-For-Performance Measures
- New Pay-For-Performance Technology Initiatives & Their Potential Impact For Behavioral Health
- The Future Of Pay-For-Performance Initiatives & Where Technology Can Improve Their Effectiveness
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.

AGENDA

- Information System Requirements For Facilitation of EBP
- Discussion Of Current Technology Challenges in Adopting EBP
- Possible Models For Addressing Implementation Of EBP At The Service Delivery Level
**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.

**AGENDA**

- Where Consumers Fit In The Current Payer-Driven & Provider-Driven Health Care System
- How to Bridge The Divide Between The Current Health Care System & The Future Consumer-Driven System
- Current Consumer-Driven Practices, Models, & Tools
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.

AGENDA

- How To Use Management Metrics In Supervision & Program Management
- Steps In Designing Management Metrics Report – Assessing & Deploying Metrics In Your Current System
- Examples Of Reporting Used For Metrics-Based Management
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.

SEMINARS:

• Best Practices For Front-Line Supervisors: Achieving Employee Performance, Retention & Commitment Through Effective Supervision
• Do I Have The Right Team? Assessing & Developing Leadership & Management Competencies
• Enhancing Customer Service Skills For Front-Line Services Staff
• An Executive Update Of U.S. Financing Of Health & Human Services: Implications For Leadership
• How Does Our Executive Team Know We’re On Track? Using Data-Driven Management To Improve Organizational And Program Performance
• How To Leverage Human Resources Investments For Increased Growth & Profitability
• Improving The Effectiveness Of Your Non-Profit Board: Tools For Planning, Performance Measurement & More
• Increased Responsibility & Accountability For Non-Profit Boards Serving Children & Families
• Leading Through Constant Change: The Mandate For Today’s Successful Executive
• Managing The Virtual Workforce

WEB BRIEFINGS:

• Applying The Appropriate Leadership Style To Meet The Needs Of Your Organization And Motivate Employees
• Are You Prepared To Lead? Finding Your Leadership Style & Building Your Strengths In A Chaotic Market
• Best Practices In Recruiting & Hiring
• Building A High-Performing Executive Team: Keys To Fine-Tuning Team Performance
• Conducting Effective Performance Appraisals/Progressive Discipline
• Emerging Best Practices In Supervision
• Leadership Survival Guide For Turbulent Times: Tools You Need Today
• Managing Managers & Managing Change As The Leader’s Challenge
• Managing Your Non-Profit Board: How To Work Successfully With Your Board Of Directors
• The New Financing & Customer Dynamics In The Behavioral Health & Social Service Field: Drivers Of Future Organizational Strategy
• Overcoming Brain Drain & Planning For Your Executive Team Retirement With Succession Management: A Roadmap For Keeping Your Talent Pool Full
• Reinventing The Cfo: The Enhanced Role Financial Officers Play In A Shifting Market
• Understanding Your Executive Leadership Style & Using It To Build Your Leadership Capacity
BEST PRACTICES FOR FRONT-LINE SUPERVISORS: ACHIEVING EMPLOYEE PERFORMANCE, RETENTION & COMMITMENT THROUGH EFFECTIVE SUPERVISION

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.

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

LEARNING OBJECTIVES

- Understand Keys To Improving Success In Hiring
- Identify How To Energize, Leverage, And Motivate Your Employees By Understanding Their Styles And How Best To Adapt Your Style
- Define Supervisory Styles And The Typical Types Of Supervisors
- Assess Your Own Supervisory Style Through An Inventory Tool
- Relate Your Own Supervisory Style To Setting Objectives, Employee Communication, And Managing Performance In Your Organization
- Develop A Personal Development Improvement Plan To Enhance Your Supervisory Performance
- Learn The Six Common Patterns Of Employee "bad habits" and how to help those employees succeed
DO I HAVE THE RIGHT TEAM?
ASSESSING & DEVELOPING LEADERSHIP & MANAGEMENT COMPETENCIES

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.

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
ENHANCING CUSTOMER SERVICE SKILLS FOR FRONT-LINE SERVICES STAFF

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.

AGENDA

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

The presenter’s ability to engage participants was excellent.

- 2008 Seminar Attendee
AN EXECUTIVE UPDATE OF U.S. FINANCING OF HEALTH & HUMAN SERVICES: IMPLICATIONS FOR LEADERSHIP

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.

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

LEARNING OBJECTIVES

- Understand The History Of The United States Health Care Financing
- Understand Behavioral Health Care Financing
- Public & Private Sector Models
- Typical Contracting Models
- Profiles Of Behavioral Health Care Organizations
- Understand Social Service Funding
HOW DOES OUR EXECUTIVE TEAM KNOW WE’RE ON TRACK? USING DATA-DRIVEN MANAGEMENT TO IMPROVE ORGANIZATIONAL AND PROGRAM 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.

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

LEARNING OBJECTIVES

- Understand The Importance Of Key Management Metrics In Today’s Environment
- learn How To Identify Key Performance Metrics
- Learn How To Create A Data-Driven Management Culture

Very good! An inspiring and motivational seminar!
- 2008 Seminar Attendee
HOW TO LEVERAGE HUMAN RESOURCES INVESTMENTS FOR INCREASED GROWTH & PROFITABILITY

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!

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
IMPROVING THE EFFECTIVENESS OF YOUR NON-PROFIT BOARD: TOOLS FOR PLANNING, PERFORMANCE MEASUREMENT & MORE

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.

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?
INCREASED RESPONSIBILITY & ACCOUNTABILITY FOR NON-PROFIT BOARDS SERVING CHILDREN & FAMILIES

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.

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
LEADERSHIP & GOVERNANCE

LEADING THROUGH CONSTANT CHANGE: THE MANDATE FOR TODAY’S SUCCESSFUL EXECUTIVE

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.

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
MANAGING THE VIRTUAL WORKFORCE

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.

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

LEARNING OBJECTIVES

- Understand The Challenges Of Effective Supervision Of Remote Employees
- Learn The Key Components Of Managing Remotely
- Learn How To Effectively Maximize Performance of Remote Employees
APPLYING THE APPROPRIATE LEADERSHIP STYLE TO MEET THE NEEDS OF YOUR ORGANIZATION AND MOTIVATE EMPLOYEES

The role of the leader is to manage change. This is especially so in health care, where the sweeping changes of health care reform, coupled with ongoing economic pressures, are transforming the system. Learn how to apply change management models for successful change in your own organization. Managers should align employee competencies with the unique, specialized needs of the organization. You will also learn how to create a rich and deep talent pool to achieve your mission by, correctly assessing employee talents; guiding and expanding their strengths; and setting a focus based on goal measurement.

WEB BRIEFING

AGENDA

- Review The Lessons Of Chamberlain At Little Round Top And Sickles At The Peach Orchard
- Learn How To Blend Transformational And Transactional Styles To Drive Needed Organizational Change
- Understand How To Address Both The Rational And Emotional Side Of Successful Change Management
- Models For Building Organizational Competencies
- Creating Teams, Clarifying Roles, & Setting Team Objectives
ARE YOU PREPARED TO LEAD? FINDING YOUR LEADERSHIP STYLE & BUILDING YOUR STRENGTHS IN A CHAOTIC MARKET

All executives are faced with challenges, both large and small, when leading an organization. The key is to find how you can utilize your own skills and experiences to lead your organization through these challenges. After reviewing the case study on Colonel Chamberlain, we will review how the leadership lessons of the Battle of Gettysburg can be applied to today’s health care market.

AGENDA

- Review The Lessons Of Chamberlain At Little Round Top
- Understand The Various Leadership Styles And Review Examples Of Each
- Build Organizational Competencies, Create Teams, Clarify Roles, And Set Objectives
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.

WEB BRIEFING

AGENDA

- Equip Supervisors To Lead Their Employees
- Selecting The Best Talent
- Identifying The Right Match Between Organization And Employee
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.

WEB BRIEFING

AGENDA

- Creating Teams & Clarifying Team Roles-In Both Standing And Ad Hoc Teams
- Issues In Team Communication & Conflict Resolution
- Setting Team Objectives & Measuring Team Performances
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.

AGENDA

- Using Progressive Discipline To Address Employee Performance Issues – What Is Progressive Discipline?
- How To Communicate Employee Performance Issues
- Six Common Patterns Of Employee Bad Habits & How To Manage Them Away
- The Compact Between An Employee & The Organization Impacts New Initiatives & Change Management
- Retaining Key Employees By Recognizing & Integrating Key Life Interests & Job Scope When Possible
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.

WEB BRIEFING

AGENDA

- The Role Of The Contemporary Behavioral Healthcare Manager
- The Transition From Professional To Manager
- The Leadership/Management Model
- Other Skills For Supervisors
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.

AGENDA

- Five Rules For Leading In A Recession
- Adjusting Your Strategy When Real-World Conditions Change Abruptly
- How High-Performance Leaders Shape The Vision And Values Of Their Organizations
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, its processes, and its structures through changing times.

WEB BRIEFING

AGENDA

- An Executive Briefing On "Change Drivers" In Health & Human Services
- Evaluating A Range Of Strategic Options – Scenario Planning & The Evolving Organization
- Change Models – Large Scale Change Models & Transformational Change Models
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.

WEB BRIEFING

AGENDA

- Options In Board Governance Roles
- Recruiting Effective Board Members
- The Board’s Role In Strategic Planning
- The Relationship With The Chief Executive-Performance Monitoring & Evaluation
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.
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.

AGENDA

- Current Thinking On Executive Team Management Competency Planning & Succession Management
- Steps In Creating An Executive Team Succession Plan For Your Organization
- Issues Unique To CEO Succession Planning
**REINVENTING THE CFO: THE ENHANCED ROLE FINANCIAL OFFICERS PLAY IN A SHIFTING MARKET**

The news is full of stories that reflect the impact of the current economic turbulence on health and human service organizations—payment delays from state payers; termination of cost-based reimbursement for services; program closures; staff reductions. And in this environment, organizations are expecting and demanding much more from the chief financial officer than simply crunching numbers.

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**AGENDA**

- Linking Budgeting And Forecasting To Strategic Planning
- Managing Increasing Regulatory Requirements
- Integrating Finance And Strategy Into The Organizational Culture
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.

WEB BRIEFING

AGENDA

- The Five Levels Of Leadership
- Understanding The Importance Of Leadership Styles
- Self-Evaluation Of Your Leadership Style
- Understanding The Range Of Leadership Styles
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.

SEMINARS:

- Developing A Winning Marketing Plan: Using ‘Best Practice’ Marketing Tools To Meet Your Organization’s Revenue Goals
- How To Win A Competitive Rfp: Developing Tactics For Building New Customer Relationships & Writing Winning Proposals
- Solution-Focused Sales: Tools To Beat The Competition & Close The Deal
- A Structured Approach To Maximizing Organizational Efficiency And Profitability Using Service Line Management
- Succeeding With Grants: Keys To Attracting Grant Funding To Your Organization

WEB BRIEFINGS:

- Another Revenue Diversification Option: Winning Competitive RFps
- Behavioral Health Opportunities In Chronic Disease Management
- Best Practices In Programming For Managing Consumers With Multiple Chronic Conditions
- Converting Prospects To Customers: Keys To Developing Prospects & Closing Sales
- Coping With The Changing Field Of Play – Bringing New Management Models To Service Delivery
- Designing A Private/Public Partnership
- Developing An Effective Marketing Plan For Uncertain Times
- Developing A Winning Development Plan: A Step-By-Step Look At Classic Fundraising Tools & Their Application In The Field
- Developing New Services: A Best Practice Guide
- Enhancing Your Customer Service Skills: A Guide For Staff On The Front-Line
- Entrepreneurship & Innovation In Behavioral Health & Social Services: A Look At The Trends & The Future
- From Facility To Community: Home-Based & “Smart Home” Service Opportunities
- Keys To Successful Implementation Of A Population-Based Care Management System
• Marketing Diagnostics: How To Identify Your Revenue & Pricing Problems
• Marketing Investments That Measure Up: An ROI Formula To Align Your Marketing Budget With Operational Objectives
• Maximizing Your Web Site And Use Of Social Media To Build Referrals
• New Developments & Service Opportunities In Neurotech & Cognitive Retraining Technology
• Optimizing Your Relationships With Care Management Organizations, Eaps, Courts, & Other Payers
• Setting Up Profitable School-Based Services
• Solution-Focused Sales: Use Consultative Selling To Eliminate The Competition, Shorten The Sales Cycle, & Close The Deal
• Strategic Revenue Diversification: What Are The Options & How Do You Decide What Options To Pursue?
• Tools You Need For Launching A New Service Line
• Understanding Your Organization’s Entrepreneurial I.Q. – Is Your Organization Ready For The Era Of Entrepreneurship & Innovation In Behavioral Health & Social Services?
• Using Innovation To Your Strategic Advantage – Creating A Marketing Edge By Harnessing The Competitive Advantages Of Emerging Technologies
• Using Large Account Management Techniques To Develop & Sustain Long-Term Customer Relationships
• What Are The Opportunities In All The Discussion Of Primary Care Integration? A Look At The Models & The Margins
• Winning Competitive Rfps: Strategy & Tactics
DEVELOPING A WINNING MARKETING PLAN: USING ‘BEST PRACTICE’ MARKETING TOOLS TO MEET YOUR ORGANIZATION’S REVENUE GOALS

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.

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 TO WIN A COMPETITIVE RFP: DEVELOPING TACTICS FOR BUILDING NEW CUSTOMER RELATIONSHIPS & WRITING WINNING PROPOSALS

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!

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
SOLUTION-FOCUSED SALES: TOOLS TO BEAT THE COMPETITION & CLOSE THE DEAL

"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.

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

ONE-DAY 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-Turing Your Approach To Account Management: Understanding How To Keep Customers & Expand Your Work With Them
A STRUCTURED APPROACH TO MAXIMIZING ORGANIZATIONAL EFFICIENCY AND PROFITABILITY USING SERVICE LINE MANAGEMENT

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.

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

LEARNING OBJECTIVES

- Creating A Service Line Model And Using Service Line Metrics For Portfolio Mapping
- Evaluating The Range Of Potential Service Line Options
- Developing A Structured Process For Service Line Decision-Making
- Designing And Developing A New Service, Checklists And Blueprints
- Using Target Costing And Zero-Based Budgeting In Service Line Planning
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? This seminar will help you answer those questions and more.

The trainer is fabulous, could have had 5 days of her training.
- 2008 Seminar Attendee

ONE-DAY 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

LEARNING OBJECTIVES
- Learn The Four Keys Of Foundation Grant Success
- Understand The Steps In Building A Grants Database
- Understand Typical Grant Application Structures
- Define Steps In Implementing A New Grant Writing Program
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.

AGENDA

- Understand The Market For Your Services
- Develop A Decision Framework On What To Bid On
- Develop The Right Product Mix
- Determine How To Price What You Sell
- Developing A Winning Response
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.

WEB BRIEFING

AGENDA

- Overview Of The Latest Developments
- Update On Current State Of Adoption
- Implications For Providers
- Future Issues For Consideration

LEARNING OBJECTIVES

- Examples Of Successful Deployment Of Tools For Chronic Disease Management
- The Challenges For Implementing Tools, & How To Overcome Them
- What The Future Holds For Opportunities In Chronic Disease Management
BEST PRACTICES IN PROGRAMMING FOR MANAGING CONSUMERS WITH MULTIPLE CHRONIC CONDITIONS

According to a 2004 SAMHSA report, the data show that more than half (52 percent) of the four million adults 18 and older with co-occurring serious mental illness and a substance use disorder received neither mental health nor specialty substance use treatment during the past year. Consumers with dual disorders have high rates of recovery when provided integrated dual disorders treatment. This panel will detail some of the best practices in programming for co-occurring disorders.

AGENDA

- Models For Providing Services For Clients Who Have Co-Occurring Disorders
- An Exploration Of The Barriers, And Solutions, To Providing Appropriate Treatment & Support Services
- The Implications For Behavioral Health Providers
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.

AGENDA

- Tips For Identifying Qualified Prospects
- Moving To The Close: Tactics To Address Common Objections
- Using A Written Proposal As A Competitive Tool
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.

AGENDA

- Understanding The Changing Health And Human Service Market
- The Organizational Performance Implications Of New Payer Demands & Changing Service Delivery Models
- Management Competencies Of The Changing Market
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.

AGENDA

- Defining The Purposes, Roles, & Objectives Of Private/Public Partnership
- Developing a Successful Process for Creating The Partnership: A Step-by-Step Model
- Integrating Continuous Quality Improvement With The Partnership
DEVELOPING AN EFFECTIVE MARKETING PLAN FOR UNCERTAIN TIMES

Understanding the market is one thing and knowing what to do to respond to the market is another. As competition for contracts, referrals, revenue, and donations heats up, organizations in the field need well-developed marketing plans. Join this session for a look at a step-by-step best practice in building your organization’s marketing plan.

AGENDA

- The Fundamental Differences Between Strategic Planning & Marketing Planning
- The Structure Of A "Winning" Marketing Plan
- The Importance Of Service Line Definition & Metrics In Marketing Planning
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.

AGENDA
- Understand The Fundamental Differences Between Strategic And Marketing Planning
- Walk Through Step-by-Step Practices to Structure A Winning Marketing Plan For Your Organization
- Learn the Importance of Service Line Definition And Metrics In Marketing Planning
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.

AGENDA

- A Framework For Making Decisions On New Service Offerings
- Steps In New Service Line Development
- Tools For Service Line Development: Development Checklists, Service Blueprints, & Target Costing Models
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.

AGENDA

- Delivering Quality Customer Service
- How To Change Customer Problems Into Opportunities
- A Few Words About Stress – "Stressed For Success"
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.

WEB BRIEFING

AGENDA

- Learn How To Stand Out In A World that Is Cluttered With Information
- Get an Update On Current Market Statistics In Behavioral Health And Social Services
- Understanding How Changes In Policy And Financing Are Changing The Competitive Landscape
- Examine The Relationship Of Customer Definitions Of Quality And Pricing In Today’s Marketplace
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.

AGENDA

- The Technology Substitution Effect: How Technology Can Reduce The Use Of Institutional Care & Support Services
- Examples Of Community-Based Technologies For Consumers With Mental Illnesses & Intellectual Disabilities
- The Evolution Of Medicaid To Support Innovative Community-Based Care Programs
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.

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
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.

AGENDA

- Understand The Possible Variables In Revenue & Pricing Issues
- Differentiate Organizational Marketing Problems From Issues Specific To Pricing, Promotion, Or Product Line
- Case Examples Of Problems (& Solutions) To Marketing Challenges
MARKETING INVESTMENTS THAT MEASURE UP: AN ROI FORMULA TO ALIGN YOUR MARKETING BUDGET WITH OPERATIONAL OBJECTIVES

How does your organization measure the impact of marketing activities? For many behavioral health and social service provider organizations, evaluating the return on marketing dollars and personnel is an exercise of assumptions, intuition, and hard to measure metrics such as “good PR” out of marketing efforts. In this session, you will learn how to use performance-based metrics to determine the return on your marketing investments.

AGENDA

- Key Principles Of Services Marketing And Applicability In Behavioral Health And Human Services
- A marketing Assessment Model
- Assessing The Impact Of Your Marketing Spending
MAXIMIZING YOUR WEB SITE AND USE OF SOCIAL MEDIA TO BUILD REFERRALS

How do you distinguish yourself in a market that is often very crowded? In today’s environment, the positioning of provider organizations, and how that positioning is communicated to purchasers and consumers, are critical elements of a successful marketing plan. In this interactive and informative session, you will learn the core components of positioning strategy, and how to determine the correct mix of marketing vehicles – both traditional and social media marketing.

AGENDA
- Key Strategic Positioning Concepts
- Determining Your Positioning Strategy
- Ensuring Consistency In Messaging
- Integrating Traditional Poring Marketing, Web-Site Marketing, And Social Media Into Your Overall Strategy
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 developments will have on the delivery of behavioral health services in order to identify opportunities for your organization.

WEB BRIEFING

AGENDA

- An Overview Of New Services Based On Current Research In Neurotech & Cognitive Retraining
- An Update On Reimbursement Models For These Emerging New Services
- The Implications For Behavioral Health Care Providers
OPTIMIZING YOUR RELATIONSHIPS WITH CARE MANAGEMENT ORGANIZATIONS, EAPs, COURTS, & OTHER PAYERS

Many provider organizations are diversifying their revenue streams by developing contracts with a variety of new customers, including care management organizations, EAPs, and the courts. Success in these new contracting relationships will be dependent upon developing relationships with these payers, understanding their needs, and developing programs to meet their needs. Join us in this timely session to learn:

AGENDA
- The Range Of New Contracting Options
- Creating A Customer-Focused Marketing Strategy
- The Fundamentals Of Account Management
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.

AGENDA
- An Overview Of The Latest Developments In School-Based Services
- An Update On Current & Potential Applications In Behavioral Health
- The Opportunities For Behavioral Health Care Providers
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.

WEB BRIEFING

AGENDA
- Why & How Successful Salespeople Focus On Buying (Not Selling) Behavior
- Highlight Your Strengths – Legal Ways To Shape The Procurement Process
- Tried & True Ways To Shorten The Sales Cycle
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.

AGENDA
- Conducting An External Market Analysis
- Analyzing Your Current Service Lines
- Determining Strategic Options For Diversification
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.

AGENDA

• What Is Service Line Management All About?
• What Are Service Line Development Tools?
• The Service Development Checklist
• Service Line Portfolio Analysis
• Service Blueprinting
• Target Costing For Launching New Services
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.

AGENDA

- Understanding Entrepreneurship – And Its Importance In The Current Market
- Characteristics Of The Entrepreneurial Organization In The Future Health And Human Service Market
- A Test Of Your Organization’s Entrepreneurial IQ - And How To build It
USING INNOVATION TO YOUR STRATEGIC ADVANTAGE — CREATING A MARKETING EDGE BY HARNESING 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.

AGENDA

- Incorporating Innovation Into Your Strategic Planning Process
- What Innovation? Evaluating New Services Offerings
- The “Vision Thing”
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.

AGENDA

- Learn How To Develop Strategic Relationships With Customers And “Grow” Them Over Time
- Get Familiar With The Key Principles Of Account Management
- Find Out How You Can Establish Performance Measures and Develop Revenue Sustainability
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.

Web Briefing

AGENDA
- Primary Care Service Delivery Models For Behavioral Health Specialists
- The Economics of Primary Care Service Delivery – Costs, Reimbursement, & More
- Repositioning Your Organization With Primary Care
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.

AGENDA

- Evaluating RFPs—A Structured Process For Choosing Where To Bid
- Approaching Each RFP With A Strategic Plan To “Win”
- The Process Of Preparing A Winning Technical And Price Proposal
- Selling Your Organization Beyond The Proposal Itself
STRATEGIC MANAGEMENT


SEMINARS:

- Best Practice Management: Tools For Achieving Superior Results Through Others
- Best Practices For Front-Line Supervisors: Achieving Employee Performance, Retention & Commitment Through Effective Supervision
- Clinical Management Tools For Implementing New Programs Using Evidence-Based Practices
- The Clinician Manager: An Intensive Training Experience For New Managers
- Developing A Winning Strategic Plan: A Structured Approach To Maximizing Resources To Achieve Your Organizational Objectives
- Developing Effective Mr/Dd Care Management Systems: New Tools For System Development
- Fine-Tuning Your Compliance Operations: Best Practices In Hipaa, Oig & Sarbanes-Oxley Compliance
- Increased Responsibility & Accountability For Non-Profit Boards
- Performance-Based Contracting In Children’s Services: How To Structure Private & Public Sector Responsibility In System Accountability
- Reinventing Your Service Delivery System: How To Build A Children’s Continuum Of Care Model For The Future
- Service Integration In Children’s Services: How To Create Successful Partnerships With Other Service Delivery Systems
- Surviving & Thriving In A Recession: A Management Blueprint For Health & Human Services

WEB BRIEFINGS:

- Are You In The Right Position? Management & Strategic Decision-Making In Times Of Crisis
- Assessing Organizational Readiness To Develop A Continuum Of Care & Accept Risk-Based Contracts
- Collaborative Management Models For Improving Economies Of Scale & Achieving Service Integration: A Look At Cooperative Models In Place In The Field
• Creating An Enhanced Recovery-Oriented System Of Care
• Creating Your Strategic Game Plan: Deciding What To Do, When, To Do It, And How
• Do You Have The Right Tactics To Win The Battle? Developing A Strategy For A Shifting Market
• Do You Know How To Command Your Troops? Creating & Leading A Successful Team
• Essential Do’s & Don’ts For Corporate Compliance
• The Futurists’ View Of Health & Human Services: A Briefing & Executive Exercise In Strategic Planning
• Getting More From Your Current Contracts & Clients – Revenue Maximization Strategies Focused On Improved Billing & Collections
• How To Select & Implement Evidence-Based Practices
• Human Capital Management: Assessing Team Competencies & Ensuring That You Have The Right Team Through Employment Development & Succession Planning
• Managing Care Across The Continuum: Keys To Success In Managing An Integrated Clinical System
• Managing Stress & Change: A Guide To Coping With Change For Front-Line Staff
• Metrics-Based Management: Using Data To Enhance Operations And Track The Progress Of Your Strategic Plan
• A Model For Developing Outpatient Services For Consumers With Dual Diagnosis
• Planning For Planning: The Five Checklists You Need To Survive In A Competitive Market
• Portfolio Analysis As A Tool For Resolving Profitability & Mission Issues
• Risk Management In An Environment Of Increasing Compliance Requirements & Audits
• The Role Of Medical Directors & Clinical Directors In Measuring & Improving Clinical Performance
• Service-Line Decision-Making & New Service Development: Tools For Evaluating Your Organization’s Service Portfolio & Assessing New Service Opportunities
• Strategic Human Resource Management: How Do You Attract & Retain Top Talent?
• Strategic Planning: A Structured Approach To Deploying Resources To Achieve Your Organizational Objectives
• Strategic Planning In An Evolving Environment: Trends Shaping Organizational Strategy In The Behavioral Health & Social Service Field
• A Strategic Reality Check: Is Your Strategic Plan Prepared For An Economic Downturn?
• Strategic Revenue Diversification: What Are The Options And How Do You Decide What Options To Pursue?
• The Tools You Need To Successfully Launch A New Service Line & Diversify Your Revenue Streams
• Unique Challenges Of Evolving From Clinical Professional To Clinical Manager
• Using The Balanced Scorecard To Create An Execution Premium
• Which New Tech Is Right For You?: How To Competitively Position Your Organization & Gain The Most Value From New Treatment Technologies
• Why Leadership Matters: The Strategic Implications Of Leadership In Behavioral Health Organizations
BEST PRACTICE MANAGEMENT: TOOLS FOR ACHIEVING SUPERIOR RESULTS THROUGH OTHERS

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.

ONE-DAY 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
BEST PRACTICES FOR FRONT-LINE SUPERVISORS: ACHIEVING EMPLOYEE PERFORMANCE, RETENTION & COMMITMENT THROUGH EFFECTIVE SUPERVISION

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.

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
**Clinical Management Tools for Implementing New Programs Using 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.

**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
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.

AGENDA

- From Clinician To Manager
- The Leadership Management Model
- The Leadership Management Model (Continued)
- Skills For Effective Management
DEVELOPING A WINNING STRATEGIC PLAN: A STRUCTURED APPROACH TO MAXIMIZING RESOURCES TO ACHIEVE YOUR ORGANIZATIONAL OBJECTIVES

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.

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

EXCELLENT SEMINAR!
- 2008 Seminar Attendee
DEVELOPING EFFECTIVE MR/DD CARE MANAGEMENT SYSTEMS: NEW TOOLS FOR SYSTEM DEVELOPMENT

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.

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
FINE-TUNING YOUR COMPLIANCE OPERATIONS: BEST PRACTICES IN HIPAA, OIG & SARBANES-OXLEY COMPLIANCE

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.

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
INCREASED RESPONSIBILITY & ACCOUNTABILITY FOR NON-PROFIT BOARDS

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.

ONE-DAY 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
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.

**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
REINVENTING YOUR SERVICE DELIVERY SYSTEM: HOW TO BUILD A CHILDREN’S CONTINUUM OF CARE MODEL FOR THE FUTURE

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.

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
SERVICE INTEGRATION IN CHILDREN’S SERVICES: HOW TO CREATE SUCCESSFUL PARTNERSHIPS WITH OTHER SERVICE DELIVERY SYSTEMS

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.

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
SURVIVING & THRIVING IN A RECESSION: A MANAGEMENT BLUEPRINT FOR HEALTH & HUMAN SERVICES

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.

OPEN MINDS did an excellent job. The information was needed and was easy to understand.
- 2008 Seminar Attendee

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
ARE YOU IN THE RIGHT POSITION?
MANAGEMENT & STRATEGIC DECISION-MAKING IN TIMES OF CRISIS

Is your team prepared in the moment of crisis? As an executive, you are faced with challenges and opportunities that can either make or break your organization. To succeed, you need to ensure that both you and your team are prepared to navigate the path ahead. In this session, after reviewing the case study on Lee and Longstreet, we will explore challenges of strategic decision making and the necessary steps you must take to lead your team through changing times.

WEB BRIEFING

AGENDA
- Review The Lessons Of Lee And Longstreet At Pickett’s Charge
- Explore How You Can Adjust Your Strategy When Real-World Conditions Change Abruptly
- Learn How To Turn “Knowledge” Into “Management”
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 childrens services, fiscal & operational preparedness for developing a continuum of care, and clinical preparedness for developing a continuum of care.

AGENDA

- Understanding Risk Models For Children’s Services
- Fiscal & Operational Preparedness For Developing A Continuum Of Care
- Clinical Preparedness For Developing A Continuum Of Care
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.
CREATING AN ENHANCED RECOVERY-ORIENTED SYSTEM OF CARE

This session will assist clinical and administrative executives with creating the elements of 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.

AGENDA

- Impediments To Adopting New Clinical Tools
- Identifying Innovative Program Models
- Performance Measurement Systems
- Developing Effective Management Methods
- Clinical Process Reengineering To Improve Consumer Outcome & Organizational Financial Performance
- The Reengineering Process Using The Strategic Quality Model In Clinical Reengineering For Consistency With Recovery Principles
- Steps In Successful Implementation Of New Clinical Processes
- Case Studies: Achieving Improved Consumer Outcomes Through System Re-engineering
Creating Your Strategic Game Plan: Deciding What to Do, When to Do It, and How

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

AGENDA

• From Plan To Implementation: Tips For Linking Strategic Planning To Operation Steps In Developing An Externally-Focused, Resource-Based Approach To Strategic Planning
• Using Scenario-Based Strategic Planning To Improve Resource Use In Fast-Changing Environments
• From Plan To Implementation: Tips For Linking Strategic Planning To Operations
DO YOU HAVE THE RIGHT TACTICS TO WIN THE BATTLE? DEVELOPING A STRATEGY FOR A SHIFTING MARKET

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? In this session, after reviewing the case study on General Buford, the speaker will explore how the decisions of leaders in any context can shape the future—whether it is the future of a battle or the future of an organization.

WEB BRIEFING

AGENDA
- Review The Lessons Of Buford And The High Ground
- How High-Performance Leaders Shape The Vision And Strategic Market Position Of Their Organization
- Best Practices In Strategy Development And Strategic Management For Turbulent Times
DO YOU KNOW HOW TO COMMAND YOUR TROOPS? CREATING & LEADING A SUCCESSFUL TEAM

Without followers, a leader is simply a man taking a walk; so the saying goes. Your team is your most important asset, and their successes and failures can make or break an organization. After reviewing the session on Abraham Lincoln, the speaker will review how you can create a successful team and keep them the leadership lessons of Lincoln and local leaders after the war at Gettysburg can be applied to staff organization in today’s health care market.

WEB BRIEFING

AGENDA

- Review The Lessons And Power Of Lincoln’s Words
- Learn How To Building And Motivate A Team
- Explore How To Build Leaders Within To Push Forward To Your Goals
ESSENTIAL DO’S & DON’TS FOR CORPORATE COMPLIANCE

Executive teams of service provider organizations are facing an increase number of requirements—from state licensing and accreditation, to HIPAA regulations and liability insurance. The question for provider organizations is how can you develop and implement an effective compliance plan that is also a risk management tool? Don’t miss this informative session where you will learn:

AGENDA

- The OPEN MINDS Corporate Compliance Checklist
- Case Studies Of Compliance Best Practices
The Futurists’ View of Health & Human Services: A Briefing & Executive Exercise in Strategic Planning

Executive teams of service provider 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.

AGENDA

- The Futurists’ Predictions
- Market Dynamics At Work: An Exercise In Developing Business Acumen
- Current Implications Of The Changing Market
- See How You Can Survive And Thrive In The Future World Of Behavioral Health
- Get An Insightful Assessment Of The External Business Landscape And Industry Metrics Now And In The Future
- Develop The Business Acumen To Respond To Market Dynamics And Execute A Strategy To Deliver The Desired Results
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.
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.

AGENDA
- The Things To Do BEFORE You Start
- An Action Plan for Implementation of EBP
- Involving Consumers
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.

AGENDA
- The Importance Of Succession Planning
- Defining Management Competencies
- Mapping Management Team Competencies
- Steps In Planning Executive Team Succession
- Conducting an Organizational Training Needs Assessment
- Leadership And Management Development Strategies
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.

AGENDA

- Continuum Of Care: The Key To The Integrated System
- Definition Of Continuum Elements
- Continuum Organization Models
- Assessing Your Continuum
- Improving The Integration Of Your Organization’s Services
- Care Management In Managed Care & Other Managed Environments
- Level Of Care Criteria
- Medical Necessity
- Utilization Management
- Outlier Management
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.

WEB BRIEFING

AGENDA

- Understanding Change-The Forces Driving Change & Change Models
- How You & Your Coworkers Respond To Change
- Developing Tools For Coping With Change
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.

AGENDA

- How To Use Management Metrics In Supervision & Program Management
- Steps In Designing Management Metrics Report – Assessing & Deploying Metrics In Your Current System
- Examples Of Reporting Used For Metrics-Based Management
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.

AGENDA

- The Market For Dual Diagnosis Programs
- Steps In Creating A New Clinical Program
- A Program Development Case Study
PLANNING FOR PLANNING: THE FIVE CHECKLISTS YOU NEED TO SURVIVE IN A COMPETITIVE MARKET

This presentation serves as a wrap-up of the Institute’s five critical checklists that every organization must have for survival in a competitive market. These practical tools will help you not only plan what needs to get done, but also monitor your organization’s progress. Don’t miss this one-of-a-kind presentation.

AGENDA

- Strategic Planning Checklist
- New Technology Evaluation Checklist
- New Service Line Development Checklist
- Marketing Planning Checklist
- Winning Proposal Checklist
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.

AGENDA

- Understanding How To Use Organizational Portfolio Mapping And Service Line Analysis To Develop Profitability Improvement Strategies
- Examples Of Service Line Profitability Analysis And Contract Profitability Analysis
- Additional Strategies For Improving Contract Profitability
RISK MANAGEMENT IN AN ENVIRONMENT OF INCREASING COMPLIANCE REQUIREMENTS & AUDITS

All executive teams of provider agencies are facing an increasing number of compliance audits – state licensing reviews, accreditation reviews, Medicaid and other payer audits. These audits are increasingly rigorous, and the consequences of scoring poorly on an audit can be very serious for an organization. How do you develop and implement an effective compliance plan that is also a risk management tool? We will inform you as to what is required for implementation of an effective compliance plan.

AGENDA

- Managing Multiple Compliance Requirements
- Implications For Organizations
- Case Studies Of Compliance Best Practices
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.

WEB BRIEFING

AGENDA

- Measuring & Improving Performance: Performance Improvement History & Concepts
- Steps In Developing Clinical Performance Metrics For Your Organization
- Using Your Clinical Performance Scorecard
- Measuring & Improving Performance Using Statistical Process Control

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.

AGENDA

- Assessing Your Service Line Portfolio
- Steps In New Service Development
- Tools For Service Development: Development Checklists, Service Blueprints, & Target Costing Models
STRATEGIC HUMAN RESOURCE MANAGEMENT: HOW DO YOU ATTRACT & RETAIN TOP TALENT?

In our current competitive, performance-driven environment, employees have the ability to make or break an organization – from managers, to front-line staff. Employee recruitment and retention are two of the most challenging issues facing health and human service organizations today. Join us for this essential session where you will learn:

AGENDA

- Developing Competency-Based Position Descriptions
- Steps In Competency-Based Recruitment To Improve Hiring Success
- Using Competency-Based Evaluations To Improve Performance

LEARNING OBJECTIVES

- The human resource management Competencies That Your Organization Needs To Succeed In The Decade Ahead
- How To Assess Your Organization’s Human Resource Competencies
- How Compete For And Retain Top Talent By Becoming An "Employer Of Choice"
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.

AGENDA

- Why Organizations Need An Externally-Focused, Resource-Based Approach To Strategic Planning
- Steps In Developing A Sure-To-Be-Implemented Organizational Strategy To Achieve Your Organizational Objectives
- From Plan To Implementation: Tips For Linking Strategic Planning To Operations
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.

AGENDA

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

AGENDA
- Planning (& Managing) In Harsh Economic Times
- Cash Management Considerations
- Finding Business Opportunities In An Economic Downturn
- Preparing For A Post-Recession Marketplace
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.

Web Briefing

AGENDA
- Conducting An External Market Analysis
- Analyzing Your Current Service Lines
- Determining Strategic Options For Diversification
THE TOOLS YOU NEED TO SUCCESSFULLY LAUNCH A NEW SERVICE LINE & DIVERSIFY YOUR REVENUE STREAMS

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 and in congruence with the overall mission of your agency.
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.

AGENDA

- The Transition From Clinician To Manager/Leader: The Unique Role Of The Contemporary Clinical Manager
- The Clinical Leader & Transactional Leadership – Managing The Organization
- The Clinical Leader & Transformational Leadership – Changing The Organization
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.

WEB BRIEFING

AGENDA

- The Balanced Scorecard
- The Five Principles Of A Strategy-Focused Organization
- Creating an Organizational Climate for Change
- Organizational Alignment
- Creating an Office of Strategic Management
WHICH NEW TECH IS RIGHT FOR YOU?: HOW TO COMPETITIVELY POSITION YOUR ORGANIZATION & GAIN THE MOST VALUE FROM NEW TREATMENT TECHNOLOGIES

So many treatment technology choices...which means that the strategic issue facing executive teams today is the decision about which new treatment technologies they should invest in. The selection of a new treatment technology should always start with your strategy. What will your organization look like in five years? What services will you deliver to what consumer groups? What will differentiate you from your competitors? If you can't answer these questions, you're not ready to invest in new treatment technologies. During this session the speaker will review a structured approach to selecting new technologies and positioning your organization to gain the most value from your investments.

WEB BRIEFING

AGENDA

- The Four Types Of Health Care Technologies Based On Service Delivery Characteristics
- The OPEN MINDS Approach To Choosing New Technology Investments
- How To Calculate The Value Of Your Technology Investments
**WHY LEADERSHIP MATTERS: THE STRATEGIC IMPLICATIONS OF LEADERSHIP IN BEHAVIORAL HEALTH ORGANIZATIONS**

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. 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? In this session you will discuss short- and long-term strategies for achieving and maintaining profitability. 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.

**AGENDA**

- Review The Lessons Of Buford And The High Ground And Lee & Longstreet At Pickett’s Charge
- How High-Performance Leaders Shape The Vision And Values Of Their Organization
- Tools To Guide Your Organization To Achieve And Maintain Viability
- Assessing Your Future Strategic Position And Adjusting Your Strategy When Real-World Conditions Change Abruptly
- Finding Business Opportunities In Times Of Shrinking Budgets