### Pre-Institute | Wednesday, February 12, 2020

<table>
<thead>
<tr>
<th>Time</th>
<th>Location</th>
<th>Track</th>
<th>Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>8:00am - 3:30pm</td>
<td>Beach &amp; Gulf</td>
<td>Executive</td>
<td>The OPEN MINDS Integration Summit: New Models For Primary Care, Behavioral Health &amp; Social Service Integration</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Summit</td>
<td>How To Develop A Strategic Plan: An OPEN MINDS Executive Seminar On Best Practices In Strategy, Portfolio Management &amp; Scenario-Based Planning</td>
</tr>
<tr>
<td>9:00am - 12:00pm</td>
<td>Island Ballroom I &amp; II</td>
<td>Executive Seminar</td>
<td>Performance Management For The C-Suite: An Executive Briefing Sponsored by Relias</td>
</tr>
<tr>
<td>11:00am - 12:30pm</td>
<td>Sand Key</td>
<td>By Invitation Only</td>
<td>The 2020 OPEN MINDS Trusted Advisors Meeting</td>
</tr>
<tr>
<td>1:00pm - 3:00pm</td>
<td>Sand Dollar</td>
<td>By Invitation Only</td>
<td>How To Build Value-Based Payer Partnerships: An OPEN MINDS Executive Seminar On Best Practices In Marketing, Negotiating &amp; Contracting With Health Plans Sponsored by The Value Based Care for Behavioral Health Online Community – Powered By CareLogic</td>
</tr>
<tr>
<td>1:00pm - 4:00pm</td>
<td>Island Ballroom I &amp; II</td>
<td>Executive Seminar</td>
<td>Performance Management For The C-Suite: An Executive Briefing Sponsored by Relias</td>
</tr>
</tbody>
</table>

### Institute Day 1 | Thursday, February 13, 2020

<table>
<thead>
<tr>
<th>Time</th>
<th>Location</th>
<th>Track</th>
<th>Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>6:30am - 7:30am</td>
<td>Beach</td>
<td>Activity</td>
<td>Morning Beach Walk Sponsored by Tabula Rasa HealthCare</td>
</tr>
<tr>
<td>7:30am - 8:30am</td>
<td>Exhibit Hall</td>
<td>Networking</td>
<td>Registration &amp; Executive Networking Breakfast</td>
</tr>
</tbody>
</table>
| 8:30am - 9:00am    | Island Ballroom I & II | Introduction | Announcement Of The Results From The 2020 OPEN MINDS Performance Management Executive Survey: Where Are We On The Road To Value?
Sponsored By The Value Based Care for Behavioral Health Online Community – Powered By CareLogic
Monica E. Oss, Chief Executive Officer, OPEN MINDS |
| 9:00am - 10:00am   | Island Ballroom I & II | Keynote Address | Improving Care: Engaging Communities & Providers Is Key To Success In The Complex Consumer Market
Tonya Copeland, Vice President, I/DD Services & Employment & Community First CHOICES, UnitedHealth Care |
| 9:00am - 10:00am   | Island Ballroom I & II | Keynote Address | Improving Care: Engaging Communities & Providers Is Key To Success In The Complex Consumer Market
Tonya Copeland, Vice President, I/DD Services & Employment & Community First CHOICES, UnitedHealth Care |
| 10:15am - 11:30am  | Island Ballroom I & II | Breakout Session | Thought Leader Discussion Session With Tonya Copeland, Vice President, I/DD Services & Employment & Community First CHOICES, UnitedHealth Care |
|                    | Island Ballroom II | Breakout Session | Workforce Innovation In A Complicated Market: Using Technology To Augment Staff & Increase Clinical Effectiveness |
|                    | Bay Room          | Knowledge Partner | Tech Budgeting For Integrated Care & Value-Based Reimbursement
Sponsored by The Value Based Care for Behavioral Health Online Community – Powered By CareLogic |
| 11:45am - 1:00pm   | Island Ballroom I & II | Breakout Session | What Does It Take To Be A Center Of Excellence? The Changing Market Role For Specialty Provider Organizations |
|                    | Island Ballroom II | Breakout Session | Rethinking Revenue Cycle Management: How To Optimize Operations For A Value-Driven World |
|                    | Bay Room          | Knowledge Partner | Managing Specialty Populations With Payer And Provider Collaboration
Sponsored by Netsmart |
| 1:00pm - 2:30pm    | Networking        | Lunch On Your Own | Lunch On Your Own |

---

**AGENDA | AT A GLANCE**
### Institute Day 1 | Thursday, February 13, 2020

<table>
<thead>
<tr>
<th>Time</th>
<th>Location</th>
<th>Track</th>
<th>Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>1:00pm - 2:30pm</td>
<td>Sand Key</td>
<td>Invitation-Only Lunch</td>
<td>Bridging The Gap Between Employee Experience &amp; Financial Sustainability</td>
</tr>
<tr>
<td></td>
<td>Bay Room</td>
<td>Invitation-Only Lunch</td>
<td>Sponsored by DATIS HR Cloud</td>
</tr>
<tr>
<td>2:30pm - 3:45pm</td>
<td>Island Ballroom I</td>
<td>Breakout Session</td>
<td>Population Health Management For The Complex Consumer Market: How To</td>
</tr>
<tr>
<td></td>
<td>Island Ballroom II</td>
<td>Breakout Session</td>
<td>Utilize Data To Coordinate Services Across The Care Continuum</td>
</tr>
<tr>
<td>4:00pm - 5:00pm</td>
<td>Island Ballroom I &amp; II</td>
<td>Payer Forum</td>
<td>The Payer Perspective: An OPEN MINDS Forum On The Performance</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Management Metrics That Health Plans Are Looking For From Providers</td>
</tr>
<tr>
<td>5:00pm - 6:00pm</td>
<td>Exhibit Hall</td>
<td>Networking</td>
<td>Executive Networking Reception</td>
</tr>
</tbody>
</table>

### Institute Day 2 | Friday, February 14, 2020

<table>
<thead>
<tr>
<th>Time</th>
<th>Location</th>
<th>Track</th>
<th>Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>7:00am - 8:00am</td>
<td>Beach</td>
<td>Activity</td>
<td>Start Your Day With Yoga...On The Beach!</td>
</tr>
<tr>
<td>8:00am - 9:00am</td>
<td>Exhibit Hall</td>
<td>Networking</td>
<td>Executive Networking Breakfast</td>
</tr>
<tr>
<td>9:00am - 10:00am</td>
<td>Island Ballroom I &amp; II</td>
<td>Keynote Address</td>
<td>New Models For Complex Consumers: The Role Of Vertical/Specialty</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Consumer Health Plans</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>John Selig, Vice President, Optum Public Sector</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Julia Brillhart, RN, MSN, Vice President, Operations, Magellan Complete Care</td>
</tr>
<tr>
<td>10:15am - 11:00am</td>
<td>Sand Key</td>
<td>Product Theatre</td>
<td>Bridging The Gap Between Mind &amp; Body Through Integrated Technology</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Sponsored by Streamline Healthcare Solutions</td>
</tr>
<tr>
<td>10:15am - 11:30am</td>
<td>Island Ballroom I</td>
<td>Breakout Session</td>
<td>Keynote Thought Leader Discussion</td>
</tr>
<tr>
<td></td>
<td>Island Ballroom II</td>
<td>Breakout Session</td>
<td>John Selig, Vice President, Optum Public Sector</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Julia Brillhart, RN, MSN, Vice President, Operations, Magellan Complete Care</td>
</tr>
<tr>
<td>11:30am - 1:15pm</td>
<td>Bay Room</td>
<td>Networking</td>
<td>Lunch On Your Own</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Invitation-Only Lunch</td>
<td>Sponsored by TenEleven Group</td>
</tr>
<tr>
<td>1:15pm - 2:30pm</td>
<td>Island Ballroom I</td>
<td>Breakout Session</td>
<td>The Future Of Residential Treatment: How Technology &amp; Innovative</td>
</tr>
<tr>
<td></td>
<td>Island Ballroom II</td>
<td>Breakout Session</td>
<td>Program Models Are Redefining Service Delivery Models</td>
</tr>
<tr>
<td>2:30pm - 3:00pm</td>
<td>Exhibit Hall</td>
<td>Networking</td>
<td>Networking &amp; Raffle Prize Drawing</td>
</tr>
<tr>
<td>3:00pm - 4:00pm</td>
<td>Island Ballroom I &amp; II</td>
<td>Keynote Address</td>
<td>The Integration Imperative: What You Need To Know &amp; Do To Remain</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Relevant</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Monica E. Oss, Chief Executive Officer, OPEN MINDS</td>
</tr>
</tbody>
</table>
RAFFLE PRIZE DRAWING

- iHealth Bluetooth SmartScale – Valued at $100
  Provided by blueEHR / ZH Healthcare
- $100 Visa Gift Card
  Provided by Core Solutions, Inc.
- Leather messenger style laptop bag with Body Electric documentary and assorted Alpha-Stim swag – Valued at $100
  Provided by Electromedical Products International, Inc.
- $100 Amazon Gift Card
  Provided by Genoa Healthcare
- Apple AirPods with a Wireless Charging Case
  Provided by Homestead Smart Health Plans
- $50 Gift Card
  Provided by iCentrix Analytics
- Apple AirPods with Charging Case
  Provided by Iris Telehealth
- Ring Video Doorbell – Valued at $100
  Provided by Netsmart
- Amazon Echo
  Provided by Patagonia Health
- $50 Gift Card
  Provided by PharmBlue
- $50 Amazon Gift Card
  Provided by Qualifacts Systems, Inc.
- $100 Visa Gift Card
  Provided by Relias
- Amazon Echo
  Provided by Secure Telehealth
- Cowin E7 Pro Headphones – Valued at $79.99
  Provided by Streamline Healthcare Solutions
- Apple AirPods – Valued at $130
  Provided by TenEleven Group
- Tory Burch half moon mixed materials satchel in black and navy – Valued at $498
  Provided by Terrapin Pharmacy
- Apple Watch, Series 3
  Provided by Welligent
- Backpack Cooler & Gift Card
  Provided by Willetts Tech
- Two night stay & gift bag
  Provided by The Sheraton Sand Key Resort
- 2 Complimentary registrations to The 2020 OPEN MINDS Strategy & Innovation Institute + 2 night stay at Sheraton New Orleans
  Provided by OPEN MINDS
- $100 Visa Gift Cards
  Provided by
  - Qualifacts Systems, Inc.
  - Credible Behavioral Health Software
  - Netsmart
  - NextGen
  - Genoa Healthcare
  - Relias
- $50 Visa Gift Cards
  Provided by
  - CapGrow Partners
  - Streamline Healthcare Solutions
  - TenEleven Group
  - Welligent
  - Core Solutions, Inc.
  - DATIS HR Cloud
  - HealthEC, LLC
  - Homestead Smart Health Plans
  - Iris Telehealth

All raffle drawings will take place in the Exhibit Hall on Friday, February 14th at 2:30pm.

To participate, pick up your raffle card at the Registration Desk, complete your card by visiting our Institute Partners in the Exhibit Hall, and submit your completed card at the registration desk by 2:00pm on Friday.

Attendees must be present to win. Don’t miss your chance to win great prizes from our partners!
<table>
<thead>
<tr>
<th>Booths 1, 2</th>
<th>Booth 3</th>
<th>Booth 4</th>
<th>Booth 5</th>
<th>Booth 6</th>
</tr>
</thead>
<tbody>
<tr>
<td>Netsmart</td>
<td>Iris Telehealth</td>
<td>HiMS Health Information Management Systems</td>
<td>DWD Technology Group</td>
<td>Core Solutions, Inc.</td>
</tr>
<tr>
<td>Booth 7</td>
<td>Booth 8</td>
<td>Booth 9</td>
<td>Booth 10</td>
<td>Booth 11</td>
</tr>
<tr>
<td>DATIS</td>
<td>Relias</td>
<td>Secure Telehealth</td>
<td>Willetts Technology</td>
<td>Otsuka Pharmaceutical</td>
</tr>
<tr>
<td>Booths 12, 13</td>
<td>Booth 14</td>
<td>Booth 15</td>
<td>Booth 16</td>
<td>Booth 17</td>
</tr>
<tr>
<td>TenEleven Group</td>
<td>ZH Healthcare, Inc.</td>
<td>Patagonia Health</td>
<td>NextGen</td>
<td>PharmBlue</td>
</tr>
<tr>
<td>Booth 18</td>
<td>Booths 19, 20</td>
<td>Booth 21</td>
<td>Booth 22</td>
<td>Booth 23</td>
</tr>
<tr>
<td>Booth 24</td>
<td>Booth 25</td>
<td>Booth 26</td>
<td>Booth 27</td>
<td>Booth 28</td>
</tr>
<tr>
<td>Homestead</td>
<td>Genoa Healthcare</td>
<td>iCentrix</td>
<td>Odyssey Software</td>
<td>CapGrow Partners</td>
</tr>
<tr>
<td>Booth 29, 30</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Credible Behavioral Health Software</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Thank you to our Exclusive Networking Partners!

DON’T MISS A CHANCE TO NETWORK & WIN A PRIZE AT 2:30PM FRIDAY!
INSTITUTE TIPS

WIFI
WIFI is available throughout the Sheraton Sand Key Resort:
Network: SAND KEY MEETING  Password: OPENMINDS20

Presentation Slides
All presentations will be posted online after the event at performance.openminds.com/presentations

Social Media Coverage
Tweeting about the Institute? Make sure you use the official hashtag – #OMPPerformance

Tag OPEN MINDS! OPEN MINDS Circle: @openmindscircle

Looking For Places To Eat?
Stop by the registration desk for a list of restaurants nearby.

DOCUMENT CARE REGARDLESS OF CELL COVERAGE OR WI-FI CONNECTION*

Experience superior EHR performance
Uniquely flexible | Highly configurable
*Results may vary.
A number of factors are driving the growth of integrated care models, including the shift away from traditional fee-for-service reimbursement models to value-based reimbursement (VBR), particularly where providers are responsible for the total cost of care for a defined population. The growing emphasis on population health has also spurred not only the growth of models integrating physical and behavioral health, but also the integration of physical health, behavioral health, social services and public health.

These growing and evolving models can require the development of a new organizational infrastructure, as well as new technical and financial competencies to ensure sustainability and success. This executive summit is designed to help organizations across the country ensure their teams are prepared for implementing and supporting integration models and have all the required competencies needed for success.

In the summit, executive teams of provider organizations will:

- Learn about the integration efforts of providers, including opportunities and challenges
- Review the key competencies organizations will need for integration models of the future, including leadership, organizational infrastructure and financial management; technology infrastructure functionality; clinical performance optimization; and consumer access and engagement.
- Discuss how to assess whether developing integrated programming should be part of an organization’s strategy

**AGENDA**

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
</tr>
</thead>
<tbody>
<tr>
<td>8:00am – 9:00am</td>
<td>Registration &amp; Breakfast</td>
</tr>
<tr>
<td>9:00am – 9:45am</td>
<td>The Evolving Challenges &amp; Opportunities In Integrated Care</td>
</tr>
<tr>
<td>Speaker: John F. Talbot, Ph.D., Vice President of Corporate Strategy, Jefferson Center for Mental Health, &amp; Senior Associate, OPEN MINDS (@openmindscircle)</td>
<td></td>
</tr>
<tr>
<td>9:45am – 10:30am</td>
<td>Cherokee Health Systems From Strategy To Execution</td>
</tr>
<tr>
<td>Speaker: Joel Horberger, MHS, Chief Strategy Officer, National Training &amp; Consulting Director, Cherokee Health Systems</td>
<td></td>
</tr>
<tr>
<td>10:30am – 10:45am</td>
<td>Break</td>
</tr>
<tr>
<td>10:45am – 11:30am</td>
<td>Radio Shack To The Apple Store For Behavioral Health Delivery Models</td>
</tr>
<tr>
<td>Speaker: Donald Parker, LCSW, President, Hackensack Meridian Health Carrier Clinic (@HMHNewJersey)</td>
<td></td>
</tr>
<tr>
<td>11:30am – 12:30pm</td>
<td>Lunch</td>
</tr>
<tr>
<td>12:30pm – 1:15pm</td>
<td>Life-Long Whole Person Care: Creating An Integrated Care Network Through Affiliate &amp; Managed Care Partnerships For Consumers With I/DD &amp; Complex Medical &amp; Behavioral Health Issues</td>
</tr>
<tr>
<td>Speaker: Tine Hansen-Turton, President &amp; Chief Executive Officer, Woods Services, Inc. (@tine_nucc_)</td>
<td></td>
</tr>
<tr>
<td>1:15pm – 2:00pm</td>
<td>Community Bridges The Integrated Care Approach For The Whole Person</td>
</tr>
<tr>
<td>Speaker: Annette Lusko, D.O., Deputy Chief Medical Officer, Community Bridges, Inc (@CBI_Arizona)</td>
<td></td>
</tr>
<tr>
<td>2:00pm – 2:15pm</td>
<td>Break</td>
</tr>
<tr>
<td>2:15pm – 3:30pm</td>
<td>The Payer &amp; Provider Perspectives: A Town Hall Discussion On What It Takes To Make Integrated Care Models Work</td>
</tr>
<tr>
<td>Speakers: John F. Talbot, Ph.D., Vice President of Corporate Strategy, Jefferson Center for Mental Health, &amp; Senior Associate, OPEN MINDS (@openmindscircle) Joel Horberger, MHS, Chief Strategy Officer, National Training &amp; Consulting Director, Cherokee Health Systems Donald Parker, LCSW, President, Hackensack Meridian Health Carrier Clinic (@HMHNewJersey) Tine Hansen-Turton, President &amp; Chief Executive Officer, Woods Services, Inc. (@tine_nucc_) Annette Lusko, D.O., Deputy Chief Medical Officer, Community Bridges, Inc (@CBI_Arizona)</td>
<td></td>
</tr>
</tbody>
</table>
PRE-INSTITUTE | WEDNESDAY, FEBRUARY 12

9:00am - 12:00pm – Executive Seminar

Island Ballroom I & II | How To Develop A Strategic Plan: An OPEN MINDS Executive Seminar On Best Practices In Strategy, Portfolio Management & Scenario-Based Planning

In the current health and human service market, executives face uncertainty. This leads many executive teams to either avoid or reluctantly initiate any major strategic initiatives that require long-term commitments. Unfortunately, “waiting for the dust to settle,” isn’t a wise management choice. Regardless of what lies ahead in the market, strategic planning is essential to ensure continued success. A successful strategic planning process will provide your organization with a roadmap – not only for developing plans in uncertain times, but also for putting those plans into action and evaluating their success. In this crucial seminar, we will discuss OPEN MINDS three-phase approach to strategy development, including:

• The OPEN MINDS best practice approach to building a strategic plan
• A guide to strategy implementation planning
• An in-depth review of how to manage strategy implementation for success

Speaker: Drew DiGiovanni, Senior Associate, OPEN MINDS (@openmindscircle)

11:00am - 12:30pm – By Invitation Only

Sand Key | Performance Management For The C-Suite: An Executive Briefing – Sponsored By Relias

For management teams of health and human service organizations, the game has changed when it comes to success and long-term sustainability. Managers need to navigate integrated care, consolidation, value-based reimbursement, emerging technologies, declining reimbursement, new competitors, and a more consumer-driven industry. In this emerging landscape, success is dependent on managing performance. But performance is now multidimensional and managers need to manage performance on five levels.

1. The performance requirements of their contracts and a wide range of accrediting and quality organizations
2. Consumer experience optimizing
3. Optimizing referrals and speed consumer access to services
4. Clinical excellence – services must be delivered consistently and with high value in terms of cost and outcomes
5. Management teams need to manage their finances – from revenue and margins, to unit costs and productivity, to value-based reimbursement optimization

In this session, join Monica E. Oss, the Chief Executive Officer of OPEN MINDS and Carol Clayton, the Chief of Translational Neuroscience, of Relias for a briefing on the current state of performance measures and performance management – and an update on their new performance management initiative.

Speakers:
Carol Clayton, Ph.D., Chief, Translational Neuroscience, Relias (@relias)
Monica E. Oss, Chief Executive Officer, OPEN MINDS (@monicaoss)

1:00pm - 3:00pm – By Invitation Only

Sand Dollar | The 2020 OPEN MINDS Trusted Advisors Meeting

This meeting will provide members of the OPEN MINDS Advisory Board the opportunity to meet with OPEN MINDS staff. We will kick off the meeting with “A Year In Review–2019” and will discuss the new and exciting opportunities coming our way in 2020. There will be an interactive dialog to discuss thoughts and ideas on what C-Suite executives need to know to keep their organizations thriving and healthy over the next several years.

Speakers:
Kimberly Bond, Executive Vice President, OPEN MINDS (@openmindscircle)
Sonya E. Goldstein, PMP, Executive Vice President, OPEN MINDS (@sonya_goldstein)
Casey Miller, Executive Vice President, OPEN MINDS (@caseyopenminds)
### ISLAND BALLROOM I & II | How To Build Value-Based Payer Partnerships: An OPEN MINDS Executive Seminar

On Best Practices In Marketing, Negotiating & Contracting With Health Plans – Sponsored By The Value Based Care for Behavioral Health Online Community – Powered By CareLogic

Across the country, managed care organizations are successfully delivering treatment services to large populations and doing it in a way that saves states significant sums of money, which means value-based reimbursement and managed care arrangements aren’t going anywhere. Executives of provider organizations must find a way to position themselves to work closely with managed care companies.

How? By developing relationships with the payers in your market, considering what metrics they are tied to and how you can help them to meet their performance requirements, discussing how you can align programs and services with the goals of the payers and health plans in your market, and providing data that proves your service lines can achieve both high quality outcomes and lower costs. In this crucial seminar, we will discuss:

- How to start strategic conversations with health plans
- How to demonstrate your organization’s value in way that will capture health plan’s interest
- How to secure and optimize service agreements with health plans

**Speaker:** Paul Duck, Senior Associate, OPEN MINDS (@paulduck)

---

### INSTITUTE | THURSDAY, FEBRUARY 13

#### 6:30am - 7:30am – Activity

**Morning Beach Walk – Sponsored by Tabula Rasa HealthCare**

Begin your day by joining us for a refreshing hour long walk along the ocean on Clearwater Beach! Bottled water to take on your walk will be provided by OPEN MINDS. Meet at the beach entrance by the towel stand at the swimming pool.

#### 7:30am - 8:30am – Registration & Executive Networking Breakfast

Check-in at the registration desk to get your name badge and program materials, then join us in the exhibit hall for breakfast. Take some time to meet your fellow attendees, talk to our partners and exhibitors, and prepare for the day ahead.

#### 8:30am - 9:00am – Introduction

**Island Ballroom I & II | Announcement Of The Results From The 2020 OPEN MINDS Performance Management Executive Survey: Where Are We On The Road To Value? – Sponsored By The Value Based Care for Behavioral Health Online Community – Powered By CareLogic**

During this opening session, OPEN MINDS Chief Executive Officer, Monica E. Oss will present the results of The 2020 OPEN MINDS Performance Management Executive Survey: Where Are We On The Road To Value. In its fourth year, the survey tracks adoption of value-based reimbursement by specialty provider organizations including the dominant models and performance measures used. Ms. Oss will discuss the implications and provide advice on how to make sure your organization keeps pace with the rest of the field.

**Speaker:** Monica E. Oss, Chief Executive Officer, OPEN MINDS (@monicaoss)
Bay Room | Tech Budgeting For Integrated Care & Value-Based Reimbursement – Sponsored By The Value Based Care for Behavioral Health Online Community – Powered By CareLogic

Providers are becoming more aware of and involved with new reimbursement models. While many can build the internal talent and resources needed to win in the VBR world, technology often seems a barrier that are difficult to overcome. The executives, who often have no technical background, are faced with expensive choices that will require focus and effort to implement. In this session we will explore questions that providers have about their technology decisions:

- How can they determine if they can afford these options?
- What are the alternatives if they can’t afford technology at this time?
- Which options will bring the best return?
- Are there some that can be delayed?
- How can they allocate internal resources to tech projects without overwhelming their staff?

In this session we will explore building a plan that helps executives make choices with confidence, manage them financially, and overcoming VBR’s most challenging task, the development of an EHR systems that can optimize results.

Speaker: Ray Wolfe, J.D., Senior Associate, OPEN MINDS (@openmindscircle)
INSTITUTE | THURSDAY, FEBRUARY 13

11:45am - 1:00pm – Knowledge Partner

Bay Room | Managing Specialty Populations With Payer And Provider Collaboration – Sponsored By Netsmart

The need to collaborate and identify gaps in care is vital to improve outcomes for complex and diverse populations. Thriving Minds funds and oversees a safety net of services for Miami-Dade and Monroe County Florida. They use a data-driven, client-centric approach to care coordination to effectively track outcomes and ensure those in need receive the right services. Technology and data sharing are imperative to the success of Thriving Minds network of exceptional providers.

Join Dr. Newcomer, President and CEO of Thriving Minds and Julie Hiett, Senior Director of Population Health, to learn about new and innovative approaches to successfully leverage technology to manage priority populations, drive outcomes and enable collaboration across providers and payers.

Speakers:
Julie Hiett, Senior Director, Population Health (@JulieHiettKC)
John W. Newcomer, President and CEO, Thriving Minds South Florida (@ThrivingMindSF)

11:45am - 1:00pm – Breakout Sessions

Island Ballroom I | What Does It Take To Be A Center Of Excellence? The Changing Market Role For Specialty Provider Organizations

Centers of Excellence (COEs) have been a strategy to promote quality and achieve healthcare cost savings for a variety of medical conditions for some time. COEs leverage pre-defined quality and cost measures to form a narrow network with benefits that reward consumers to use the most effective, high value treatment providers. While this approach has been in place for over a dozen years in physical health services, this is a relatively new approach for conditions related to behavioral health and substance use. In this session, we will hear from payers on how they are designing and implementing COEs tied to behavioral health conditions including reimbursement approaches, selection criteria, impact on consumer quality outcomes and healthcare cost savings. We will also hear from provider organizations that have earned COE status on their experiences including best practices and lessons learned.

Speakers:
Deb Adler, Senior Associate, OPEN MINDS
Pablo McCabe, LCSW, Director, National & Strategic Accounts Team, Hazelden Betty Ford (@hazldnbettyford)
Erin Boyd, Behavioral Network Strategy, Solutions & Program Director, Cigna (@Cigna)
Debra Nussbaum, Ph.D., LCSW, Senior Director, Behavioral Product, Optum (@Optum)

Island Ballroom II | Rethinking Revenue Cycle Management: How To Optimize Operations For A Value-Driven World

In a value-driven world, one of the most important changes organizations have to make is expanding their revenue cycle management model. To facilitate an effective transition away from fee-for-service reimbursement structures, focus must be placed on revenue cycle management strategies that support fee-for-service while facilitating the transition to new payment models. Provider organizations that understand how to manage costs, while delivering quality service and better outcomes, will be in the best positioned to thrive.

In this session, attendees will learn about how to broaden their thinking on revenue cycle management and how to optimize their revenue cycle for value-based reimbursement.

Speakers:
Joseph P. Naughton-Travers, EdM, Senior Associate, OPEN MINDS (@openmindscircle)
Vanessa R. Lane, MBA, Vice President, Revenue Cycle Management/ Data Analytics, Grafton Integrated Health Network (@GraftonNetwork)

1:00pm - 2:30pm – Lunch On Your Own

The institute hotel is located on Clearwater Beach, steps away from many local favorite restaurants. Stop by the registration desk for a listing of restaurants.
INSTITUTE | THURSDAY, FEBRUARY 13

1:00pm - 2:30pm – Invitation-Only-Lunch

**Sand Key | Bridging The Gap Between Employee Experience & Financial Sustainability – Sponsored by DATIS HR Cloud**

Your organization is its workforce, and can be the difference between success and failure. Taking care of your employees first has increasingly become not just a best practice, but an industry standard. But how can we strike the right balance between a focus on employees and the financial requirements of keeping your organization running? In this session, Erik Marsh, CEO of DATIS, will explore how these two seemingly conflicting priorities are actually more related than they appear at first glance. Join us as we explore the building blocks for developing a successful workforce management strategy that works for both your people and your organization.

*Speaker: Erik Marsh, President and CEO, DATIS HR Cloud (@ErikMarsh_USA)*

**Bay Room | The ABC’s Of Reporting: The Value Of Reporting To Multiple Payers Simultaneously – Sponsored by Streamline Healthcare Solutions**

The demands for additional data from payers continues to grow. As this market shift occurs, the burden on organizations to capture and report outcomes data becomes an unwieldy target. When it comes to reporting outcome measures, it is essential to know how to incorporate this process into your daily workflows so you are retrieving quality data from your Electronic Health Record (EHR). In this valuable learning session, Katie Morrow, LBSW, MPA, VP of Compliance will discuss the outcome measure requirements of major reimbursement models overlap with one another and how you can take advantage of this to maximize reimbursement. We will discuss how to reduce the burden on the staff responsible for capturing this data and tools for adapting your reporting as the behavioral health reimbursement process evolves.

*Speaker: Katie Morrow, Vice President of Compliance, Streamline Healthcare Solutions (@StreamlineHCSol)*

**2:30pm - 3:45pm – Breakout Session**

**Island Ballroom I | Population Health Management For The Complex Consumer Market: How To Utilize Data To Coordinate Services Across The Care Continuum**

Data is the key for care coordination, but many organizations struggle with what data is needed and how to effectively leverage this data. To understand the risks their consumers are facing and in order to provide effective services that best meet their consumers’ needs, providers must gather a variety of data, clinical and financial, from a number of different types of providers and sources. Combining these data sources into a single actionable record is paramount to improving care and outcomes for individuals.

In this session, we will hear from executives of organizations with experience bringing together disparate types data and how they are utilizing this data for care coordination.

*Speakers:*
- **James Stewart, President & CEO, Grafton Integrated Health Network & Advisory Board Member, OPEN MINDS (@GraftonNetwork)**
- **Cathy Lipton, M.D., CMD, National Medical Director, Institutional Programs, Optum (@Optum)**
- **Dianne Shaffer, LMSW, Director of Systems Development, Integrated Services of Kalamazoo**
- **Sarah Green, RN, BSN, MBA, HCS-D, COS-D, Senior Integrated Healthcare Specialist, Southwest Michigan Behavioral Health**

**Island Ballroom II | Key Performance Indicators For Value-Based Care: How To Use Performance Metrics To Build A Value Proposition For Health Plans**

More competition and more value-based reimbursement (VBR) are making performance metrics more important than ever for health and human service organizations. Finding the right performance metrics to demonstrate value to health plans has been a big challenge for many executive teams.

One method of metrics-based management is the development of a key performance indicator (KPI) system. An effective KPI system captures financial and non-financial measures, and is driven by structured data based upon an organization’s strategic objectives. This session will discuss the steps to developing applicable measures and the use of these measures for building a value proposition for health plans. We will also hear case study presentations from organizations that have developed performance metrics and have used them to create a strategy for successfully working with health plans.

*Speakers:*
- **Deb Adler, Senior Associate, OPEN MINDS (@openmindscircle)**
- **Ashley Sandoval, Associate CEO, Emergence Health Network (@GraftonNetwork)**
- **Stan Monroe, J.D., President & General Counsel, MindPath Care Centers (@mindpathcare)**
INSTITUTE | THURSDAY, FEBRUARY 13

4:00pm - 5:00pm – Payer Forum

Island Ballroom I & II | The Payer Perspective: An OPEN MINDS Forum On The Performance Management Metrics That Health Plans Are Looking For From Providers

As reimbursement shifts to value-based models, health care providers continue to ask how payers define value and what metrics prove that their investments in consumer care result in better outcomes and the reduction in or avoidance of unnecessary health care costs. Join us for a straightforward discussion with health plan representatives who will share organizational strategies for measuring and rewarding success with value-based reimbursement models.

Speakers:
Ray Wolfe, J.D., Senior Associate, OPEN MINDS (@openmindscircle)
Cathy Lipton, M.D., CMD, National Medical Director, Institutional Programs, Optum (@Optum)
Melissa Nichols, MHA, SVP, Network Performance & Planning, Beacon Health Options (@BeaconHealthOpt)
Lori Fertall, MBA, Director of Value-Based Programs, Community Care Behavioral Health Organization
Susanna Kramer, MA, Director of Performance Evaluation, Community Behavioral Health

5:00pm - 6:00pm – Executive Networking Reception In Institute Exhibit Hall

Wrap up the day by taking time to network with your colleagues and partners. Take some time to discuss the day’s events while enjoying a drink and hors d’oeuvres.

INSTITUTE | FRIDAY, FEBRUARY 14

7:00am - 8:00am – Yoga On The Beach

Yoga On The Beach

Breathe in the fresh, salty air! Rejuvenate your creativity, focus, and mindfulness by starting your day with yoga. This class will wake you up and get you going for the rest of the day!

Open to all levels. Bring your own mat or use one of ours. Bottled water will be provided by OPEN MINDS.

Meet Joe Naughton-Travers, Senior Associate, OPEN MINDS at the beach entrance by the towel stand at the swimming pool. If the weather does not cooperate, the class will be held in Sand Dollar on the 8th floor.

8:00am - 9:00am – Registration & Executive Networking Breakfast

Join us in the exhibit hall for breakfast. Take some time to meet your fellow attendees, talk to our partners and exhibitors, and prepare for the day ahead.

9:00am - 10:00am – Keynote Address

Island Ballroom I & II | New Models For Complex Consumers: The Role Of Vertical/Specialty Consumer Health Plans

States are increasing the development of health plans that serve only complex consumer populations such as those with serious mental illness, HIV, are in the child welfare system, or with an intellectual/developmental disability. The expectation of payers for these specialty plans is that they will coordinate the physical, behavioral, pharmacy, and social aspects of care. To make this happen, payers are increasingly looking towards bundled payments and alternative payment models. For provider organizations, these models increase the need to share data; make and track referrals; collect and report performance data; and accept some form of reimbursement linked to value become basic requirements.

In this keynote session, we will hear from the payers who are operating these models including an overview of their model, what is working well, and where there are pain points. The payers will also discuss what they are looking for in a provider partner.

Speakers:
Ray Wolfe, J.D., Senior Associate, OPEN MINDS (@openmindscircle)
John Selig, Vice President, Optum Public Sector (@Optum)
Julia Brilhart, RN, MSN, Vice President, Operations, Magellan Complete Care (@MagellanHealth)
INSTITUTE | FRIDAY, FEBRUARY 14

10:15am - 11:00am – Product Theatre

Sand Key | Bridging The Gap Between Mind & Body Through Integrated Technology – Sponsored By Streamline Healthcare Solutions

Health care providers and government officials understand that an individual’s mental health is just as important as his or her physical health and how closely the two are related. The holistic approach to care has, and continues to improve the overall well-being of clients and provides benefits to the providers and payers. Kevin Sullivan, Director of Client Solutions with Streamline will demonstrate how SmartCare, Streamline’s fully web-based Electronic Health Record, incorporates documentation for both behavioral health and primary care to create a complete, fully integrated client record.

Speaker: Kevin Sullivan, Director of Client Solutions, Streamline Healthcare Solutions (@StreamlineHCSol)

10:15am - 11:30am – Breakout Session

Island Ballroom I | Keynote Thought Leader Discussion

Join us for a follow-up session with our keynote speakers, Julia Brillhart, RN, MSN, Vice President, Operations, Magellan Complete Care and John Selig, Vice President, Optum Public Sector. Use this time to ask questions and continue the morning’s discussion with Ms. Brillhart, Mr. Selig and OPEN MINDS Senior Associate Ray Wolfe, J.D.

Speakers:
Ray Wolfe, J.D., Senior Associate, OPEN MINDS (@openmindscircle)
John Selig, Vice President, Optum Public Sector (@Optum)
Julia Brillhart, RN, MSN, Vice President, Operations, Magellan Complete Care (@MagellanHealth)

Island Ballroom II | Technology – How Much Is Enough? An Executive Discussion Group

How much should your organization be spending on technology? What kind of tech staffing do you need? Join this facilitated discussion group with OPEN MINDS Senior Associate Joe Naughton-Travers to learn more about managing technology – rather than having it manage you. We’ll be asking discussion group participants to share the framework for their organization’s technology – software, hardware, budgets, and staffing – as well as their future plans for optimizing their tech investments and tech operations.

Speaker: Joe Naughton-Travers, Senior Associate, OPEN MINDS (@openmindscircle)

11:30am - 1:15pm – Lunch On Your Own

The institute hotel is located on Clearwater Beach, steps away from many local favorite restaurants. Stop by the registration desk for a listing of restaurants.

11:45am - 1:00pm – Invitation-Only-Lunch

Bay Room | Lean Six Sigma & Operational Efficiencies In Healthcare – Sponsored By TenEleven Group

During this session, Dr. Singh will detail Lean Six Sigma, which is a process improvement methodology designed to eliminate problems, remove waste and inefficiency, and improve working conditions to provide a better response to customers’ needs. Topics will include paths to cost reduction; value-added and non-value-added activities; batch vs. continuous flow and other compelling business principles.

Speaker: Arvin Singh, MBA, MPH, MHL, LSSGB, PhD.c, Chief Operating Officer, TenEleven Group (@TenElevenGroup)

Don’t forget to submit your raffle cards by 2:00pm for a chance to win prizes donated by our sponsors!
Island Ballroom I | The Future Of Residential Treatment: How Technology & Innovative Program Models Are Redefining Service Delivery Models

Residential treatment continues to have an important and evolving place in the continuum of care for patients with complex needs. Join us to learn how provider organizations are turning to technology to improve both the quality and efficiency of care.

This session will focus on:

- The changing residential treatment landscape
- Different technologies that are re-defining service models
- How organizations have created innovative solutions for residential programs

Speakers:
John F. Talbot, Ph.D., Vice President of Corporate Strategy, Jefferson Center for Mental Health, & Senior Associate, OPEN MINDS (@openmindscircle)
John Stupak, Chairman, Sequel Youth & Family Services
Marianne Birmingham, MS, CMUP, Regional Director of Compliance & Quality, Sequel Youth & Family Services
Theresa Jenkinson, Vice President, Strategic Initiatives, Inglis
Jason Willetts, Chief Technology Officer, Sequel Youth & Family Services

Island Ballroom II | Transformational Customer Service That Drives Organizational Culture & Client Experience

As the healthcare industry encounters the substantial shift in reimbursement and how we define value, organizational culture and the organization’s ability to differentiate competitively with creating a “raving fan” customer service experience for their customers will be both expected as well as appreciated. Health care has historically been identified with some of the worse customer experiences. This session will take us through a new paradigm of thinking, where we will address:

- The importance of customer service in the era of value-based care
- The key drivers of a great customer service experience in health care
- Best practices in creating a superior customer experience, including hiring the right team to build a culture of customer service

You will walk away from this session with a practical understanding of how to make necessary changes as well as inspire you to lead the change and making “raving fan” customer service a competitive advantage for your organization!!

Speaker: Paul Duck, Senior Associate, OPEN MINDS (@paulduck)

2:30pm - 3:00pm – Networking & Raffle Prize Drawing

Be sure to submit your raffle card by 2:00pm on Friday, February 14! Must be present to win!

3:00pm - 4:00pm – Keynote Address

Island Ballroom I & II | The Integration Imperative: What You Need To Know & Do To Remain Relevant

The health care landscape continues to shift – shaped by payer preference for integration, the shift to reimbursement for value, consumerism, and technology. This evolution has changed the key strategic question for executive teams of specialty provider organizations – is your organization relevant? Will it continue to be relevant?

The question is shaped by the two ends of the service delivery continuum. Are you positioned to participate in increasingly ‘integrated’ systems? Do you have a clearly defined specialty and are you ‘best of breed’ in that specialty? The answer to these questions lies in the numbers. Do your outcomes demonstrate good consumer health and efficient service utilization? Do consumers find your services convenient to use with a great experience? Are you a ‘good deal’, financially speaking?

Learn how executive teams are answering these questions and managing to better value in the closing keynote address of Monica E. Oss, the CEO and Founder of OPEN MINDS. In her closing, she will focus on the current status of performance and performance management, the strategic implications of building a data-driven organization, and how to use performance data to craft a sustainable future strategy.

Speaker: Monica E. Oss, Chief Executive Officer, OPEN MINDS (@monicaoss)
PsychU is a free community and award-winning online resource library for mental health. Our more than 50,000 community members share one simple belief: Improved information, increased collaboration, and ongoing discussion will lead to better mental health care and outcomes for individuals with mental illnesses. Join us as we improve mental health care... together.

Visit www.PsychU.org to learn more and become a part of this dedicated community.

Learn more about our partners who are currently providing these services on Netsmart platforms:

- Addiction Treatment, with integrated Medication Assisted Treatment
- Autism and ABA therapy
- CCBHC services
- I/DD services
- Primary Care services as part of an FQHC

Are you settling for an incomplete view of your consumers? Logging into portals and/or using multiple disparate systems to support your service lines?

Netsmart
www.ntst.com | 1.800.472.5509

One Person.
One View.
Better Care.

PsychU is supported by Otsuka Pharmaceutical Development & Commercialization, Inc. (OPDC), Otsuka America Pharmaceutical, Inc. (OAPI), and Lundbeck, LLC — committed supporters of the mental health treatment community. The opinions expressed by PsychU’s contributors are their own and are not endorsed or recommended by PsychU or its sponsors. The information provided through PsychU is intended for the educational benefit of mental health care professionals and others who support mental health care. It is not intended as, nor is it a substitute for, medical care, advice, or professional diagnosis. Health care professionals should use their independent medical judgement when reviewing PsychU’s educational resources. Users seeking medical advice should consult with a health care professional. No CME or CEU credits are available through any of the resources provided by PsychU. Some of the contributors may be paid consultants for OPDC, OAPI, and/or Lundbeck, LLC.

© 2020 Otsuka Pharmaceutical Development & Commercialization, Inc. All rights reserved. January 2020 MRC2.CORP.X.04232
PKDnetwork is an online community of people who are dedicated to increasing the awareness of Polycystic Kidney Disease (PKD).

Through increased awareness, collaboration, and information-sharing, our mission is to improve the future outcomes for individuals with PKD.

Learn more about PKDnetwork and join our community at www.PKDnetwork.org
Since 2005, We Have Offered Strategic Leasing Options For Providers Like You

- Purchase/Leases
- Sale/Leasebacks
- Build-To-Suit/Leases
- Landlord Transfers
- Modification Financing

www.capgrowpartners.com | 773.329.4678
Genoa Healthcare® on-site pharmacies help your patients stay on their medications, keeping them healthier and out of the hospital.

- **90%** Medication adherence rate
- **40%** Fewer hospitalizations
- **18%** Fewer ER visits

Stop by Booth #25 to learn more!


Empowering organizations to meet and deliver on the healthcare challenges of today.

Visit [www.relias.com](http://www.relias.com) to learn more.
EHR built for insight. Designed to evolve with your organization.

Streamline builds innovative technology empowering people who improve behavioral health and quality of life of those in need.

Anytime. Anywhere. Anyone. SmartCare™

Follow us on:

streamlinehealthcare.com

CAN YOUR EHR DO IT ALL?
Our intuitive, all-in-one EHR solution simplifies everything from intake and documentation to staff and revenue cycle management – so you can spend more time focused on your quality of care.

See how we can create more positive client outcomes, together. Request a personalized demo at welligent.com
Your complete EHR and billing solution!

Our self-service EHR system and dedicated billing specialists will take your business to the next level!

Come see us at booths 12 & 14!

UNIFIED HR & PAYROLL SOFTWARE TAILORED TO YOUR NEEDS

A Purpose-Built Solution for Health and Human Services Organizations

For more than 25 years, our fully unified HR and Payroll platform has been empowering organizations to increase visibility, maximize resources, and make an impact.

Stop by Booth 7 to learn more.
While behavioral health and social determinants of health have moved to the forefront of today’s healthcare market, HealthEC has been focused on them since our inception in 2012.

With built-in behavioral health and SDoH assessments, our platform delivers population health management, value-based care and care management solutions across the healthcare spectrum.

Learn how we can help your organization improve quality performance, patient outcomes and costs.

www.HealthEC.com

Iris Telehealth is a telepsychiatry provider organization made up of the highest quality psychiatrists and psychiatric nurse practitioners. Our mission is to provide underserved communities with access to the best mental health specialists and prescribers. We are owned and operated by doctors who understand what patients need and have earned a reputation for providing outstanding customer service.

STOP BY OUR BOOTH!

IRIS TELEHEALTH
INTRODUCING...

Integrated Care Online

powered by

nextgen healthcare

Free membership for health and human service organization executives, managers, and other leadership staff serving individuals with chronic conditions & looking to optimize integrated care practices!

The only platform offering up-to-date information, expert perspectives, and mobile content specific to primary care and mental health services. This constantly growing community offers unique perspectives to clinicians, hospitals, and labs to support organizations serving consumers with complex conditions and support needs.

sign-up at integratedcareonline.com

in collaboration with -
Most organizations *have* a mission. Credible is *on* a MISSION.

Empowering Agencies to deliver the highest quality Behavioral Health through technology.

- Over 19 years of Behavioral Health focus, experience, and innovation
- 475+ Partners in 36 states
- Easy to use clinical interface
- Monthly Partner/Market Driven Innovation
- Fully integrated, 100% SaaS
- Meaningful Use Stage 3 Certified
- Fully integrated eRx and eLabs
- Industry leading mobile provider - Connected or Disconnected
- Founder owned and Founder run; An independent, financially strong, lasting company
- Ad hoc reporting to match changing state, payer, and management needs
- Mission-based and built to stay that way