

# SUMMIT AGENDA:

## BENDING THE COST CURVE

Swissotel, Chicago, IL

	TRACKS	Room
TRACK 1	<b>Decision Support &amp; Cost Reduction</b> Driving out Costs by Understanding the True Cost of Healthcare Delivery	Zurich A
TRACK 2	<b>Operating Budgeting:</b> Optimize and Advance Your Organization Through a More Flexible and Comprehensive Budgeting Process	Zurich B
TRACK 3	<b>Capital &amp; Strategic Planning:</b> Gain Control and Improve Flexibility in Capital Planning and Plan for the Future	Zurich C

### TUESDAY, OCTOBER 21, 2014

8 – 9 a.m.	<b>Breakfast – Vevey Ballroom</b>		
9 – 10:30 a.m.	<b>Keynote Session: Bending the Cost Curve (1 CPE) – Zurich Ballroom</b>		
	<b>DAN MICHELSON</b> Chief Executive Officer Strata Decision Technology	<b>LIZ KIRK</b> Vice President, Cost Solutions Strata Decision Technology	
	<b>GREG KLUGHERZ</b> Vice President of Finance and CFO CentraCare Health	<b>ASHUTOSH RAGHUVANSHI, MD</b> Chief Executive Officer Narayana Hrudayalaya Heart Hospital	
10:30 – 11 a.m.	<b>Break</b>		
11 – 11:50 a.m.	<b>TRACK 1:            DECISION SUPPORT &amp; COST            REDUCTION</b>	<b>TRACK 2:            OPERATING BUDGETING</b>	<b>TRACK 3:            CAPITAL &amp; STRATEGIC            PLANNING</b>
	<b>A Journey to Operating at Medicare Margins (1 CPE)</b>  <b>MIKE SITOWITZ</b> Controller Parrish Medical Center	<b>Case Study: StrataJazz Management Reporting Demonstration with Meriter - UnityPoint Health (1 CPE)</b>  <b>RONALD SCHROEDER</b> Regional Director of Accounting UnityPoint Health  <b>JONI QUALE</b> Budget & Forecast Senior Analyst Meriter - UnityPoint Health	<b>An Equipment Replacement Journey - Lessons Learned (1 CPE)</b>  <b>PAT SURDY</b> Director of Capital, Property and Debt Cleveland Clinic
12 – 1 p.m.	<b>Lunch</b>		

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## TUESDAY, OCTOBER 21, 2014 – CONTINUED

1 – 1:50 p.m.	TRACK 1: DECISION SUPPORT & COST REDUCTION	TRACK 2: OPERATING BUDGETING	TRACK 3: CAPITAL & STRATEGIC PLANNING
	<p><b>Implementing StrataJazz Decision Support: A Model for Successful Implementation</b> (1 CPE)</p> <p><b>LAURA DOUCETTE</b> Director of Reimbursement and Decision Support Boston Children’s Hospital</p> <p><b>SUZANNE MCDERMOTT</b> Sr. Director of Operations and Decision Support Physicians’ Organization Boston Children’s Hospital</p>	<p><b>A Strategic Approach to a Budgeting Timeline</b> (1 CPE)</p> <p><b>ALICIA MAZON</b> Lead - Accounting &amp; Budgeting West Virginia United Health System</p>	<p><b>Product Demonstration: Using StrataJazz for Scenario Based Planning</b></p> <p>Strata Decision Technology</p>
1:50 – 2 p.m. <b>Break</b>			
2 – 2:50 p.m.	<p><b>A High Performance Decision Support Operation</b> (1 CPE)</p> <p><b>ERIC KRETZER</b> VP, Product Management Strata Decision Technology</p> <p><b>TUSHAR PANDEY</b> Director, Consulting Services Strata Decision Technology</p>	<p><b>Best Practices in Physician Budgeting</b> (1 CPE)</p> <p><b>NICOLE ASHE</b> Vice President and CFO Wellstar Medical Group</p> <p><b>MARIBEL BAILEY</b> Director Financial Operations Wellstar Medical Group</p> <p><b>KATIE THOMAS</b> Director of Financial Planning Wellstar Health System</p>	<p><b>Group Therapy: Capital Planning User Group Workshop</b> (1 CPE)</p> <p>Strata Decision Technology</p> <p><b>RICHARD BURRSTON</b> Corporate Capital Budget Director Intermountain Healthcare</p>
2:50 – 3 p.m. <b>Break</b>			
3 – 3:50 p.m.	<p><b>Product Demonstration: Using StrataJazz to Improve Cost Accounting</b></p> <p>Strata Decision Technology</p>	<p><b>Establishing a System Wide Operating Budgeting Process</b> (1 CPE)</p> <p><b>JAYMES CHENEY</b> Sr. Budget / Reimbursement Analyst Adventist Health</p> <p><b>CHRIS JONES</b> Sr. Financial Analyst Adventist Health</p>	<p><b>Group Therapy: Strategic Planning User Group Workshop</b> (1 CPE)</p> <p>Strata Decision Technology</p> <p><b>MEAGHAN LUTTS</b> Director, Business Intelligence &amp; Financial Analytics The Children’s Hospital of Philadelphia</p>
6 – 9 p.m. <b>Dinner Reception – Navy Pier</b>			

## WEDNESDAY, OCTOBER 22, 2014

7:30 – 8:15 a.m.	<b>Breakfast – Vevey Ballroom</b>		
8:15 – 9:45 a.m.	<b>Keynote Session: The Greatest Healthcare Story Ever Told – Zurich Ballroom</b>		
	<b>DAN MICHELSON</b> Chief Executive Officer Strata Decision Technology	<b>ERIC KRETZER</b> Vice President, Product Management Strata Decision Technology	
	<b>GEORGE LOMBARDI, MD</b>		
9:45 – 10:00 a.m.	<b>Break</b>		
10 – 10:50 a.m.	<b>TRACK 1 – DECISION SUPPORT &amp; COST REDUCTION</b>	<b>TRACK 2 – OPERATING BUDGETING</b>	<b>TRACK 3 – CAPITAL &amp; STRATEGIC PLANNING</b>
	<b>Product Demonstration: First Look at Strata Decision's Cost Solution</b>  <b>LIZ KIRK</b> VP, Cost Solutions Strata Decision Technology  <i>(this session repeats on 10/22 at 3pm)</i>	<b>Group Therapy: Management Reporting User Group Workshop (1 CPE)</b>  Strata Decision Technology  <b>SCOTT REED</b> Director of Finance Norton Healthcare	<b>Five Year Operating and Capital Planning (1 CPE)</b>  <b>MARY KEITH GIORDANO</b> Vice President, Business Development Sharp HealthCare
10:50 – 11 a.m.	<b>Break</b>		
11 – 11:50 a.m.	<b>Akron Children's Hospital: Our Decision Support Journey (1 CPE)</b>  <b>JEFF HALE</b> Vice President of Analytics and Performance Management Akron Children's Hospital	<b>Group Therapy: Operating Budgeting User Group Workshop (1 CPE)</b>  Strata Decision Technology  <b>SCOTT REED</b> Director of Finance Norton Healthcare	<b>Transforming the Long Range Financial Plan for a More Centralized Organized Organization (1 CPE)</b>  <b>ANTHONY DORSCH</b> CFO - Alaska Region Providence Health & Services
12– 1 p.m.	<b>Lunch</b>		
1 – 1:50 p.m.	<b>Group Therapy: Decision Support User Group Workshop (1 CPE)</b>  <b>LAURA DOUCETTE</b> Director of Reimbursement and Decision Support Boston Children's Hospital	<b>Management Reporting - More Than Financial Data (1 CPE)</b>  <b>JEFF HALE</b> Vice President of Analytics and Performance Management Akron Children's Hospital	<b>Integrating Service Line Planning into your Long Range Planning Process (1 CPE)</b>  <b>SONJA ZITUR</b> Director of Finance CentraCare Health
1:50 – 2 p.m.	<b>Break</b>		

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## WEDNESDAY, OCTOBER 22, 2014 - CONTINUED

2 – 2:50 p.m.	TRACK 1 – DECISION SUPPORT & COST REDUCTION	TRACK 2 – OPERATING BUDGETING	TRACK 3 – CAPITAL & STRATEGIC PLANNING
	<p><b>Establishing a Successful Cost Improvement Initiative</b> (1 CPE)</p> <p><b>LIZ KIRK</b> VP, Cost Solutions Strata Decision Technology</p>	<p><b>Operating Budget Challenges, Issues, and Concerns in an Academic Medical Center Setting</b> (1 CPE)</p> <p><b>SUZANNE WOJTOWICZ</b> Director of Financial Planning &amp; Analysis Georgia Regents Health System</p>	<p><b>Product Demonstration: Using StrataJazz for Equipment Replacement Planning</b></p> <p>Strata Decision Technology</p>
<b>Break</b>			
3 – 3:50 p.m.	<p><b>Product Demonstration: First Look at Strata Decision's Cost Solution</b></p> <p><b>LIZ KIRK</b> VP, Cost Solutions Strata Decision Technology</p> <p><i>(this session repeats on 10/22 at 10am)</i></p>	<p><b>Fairview's Approach to Service Line Budgeting</b> (1 CPE)</p> <p><b>COLLIN MCNULTY</b> Manager of Financial Planning &amp; Analysis Fairview Health Services</p> <p><b>KRIS TUSETH</b> Director of Decision Support &amp; Revenue Analysis Fairview Health Services</p>	<p><b>Our Journey from Budgeting to Forecasting</b> (1 CPE)</p> <p><b>B.J. MILLER</b> Senior Director, Performance and Planning Park Nicollet Health Services</p>

<b>LEVEL 1</b>	<p><b>Implement:</b></p> <p>Provides training on basic concepts within StrataJazz and what they look like in practice. Led by a client and Strata Decision. Recommended for users about to or currently undergoing implementation.</p>	Vevey 2
<b>LEVEL 2</b>	<p><b>Empower:</b></p> <p>Provides hands-on StrataJazz training. Led by Strata Decision consultants. Recommended for users who are using the system for their first year.</p>	Vevey 3
<b>LEVEL 3</b>	<p><b>Optimize:</b></p> <p>Provides solution specific training on advanced functionality within StrataJazz and what it looks like in practice. Led by a client and Strata Decision. Recommended for users who have been using the system for two years or more.</p>	Vevey 4

**THURSDAY, OCTOBER 23, 2014**

8 – 8:45 a.m.	<b>Breakfast – Vevey 1</b>		
8:45 – 10:15 a.m.	<p><b>LEVEL 1: IMPLEMENT</b></p> <p><b>System Rollout: Keys to a Successful Implementation</b></p> <p><i>Discuss keys to a successful implementation rollout and how to avoid common pitfalls. Topics include setting expectations, the implementation life cycle, approaches to rolling out StrataJazz, organizational buy-in and change management.</i></p> <p><b>TIM TAYLOR</b>                  Director, Financial Analysis Systems                  Forest Park Medical Center</p> <p><b>CAITLIN ILES</b>                  Project Manager                  Strata Decision Technology</p> <p><b>CHRIS BARTH</b>                  Sr. Consultant - Implementation                  Strata Decision Technology</p>	<p><b>LEVEL 2: EMPOWER</b></p> <p><b>How to be a PRO at Managing Assumptions</b></p> <p><i>Learn the basics of the Data Studio 2.0 tool to manage data and assumptions centrally across models. Walkthrough of an example scenario where assumptions are pushed out to show the impact on Strategic Planning and Operating Budgeting models.</i></p> <p><b>ROSE LISCOVITZ</b>                  Consultant - Optimization                  Strata Decision Technology</p> <p><b>SHIKHA MEHRA</b>                  Sr. Business Analyst                  Strata Decision Technology</p>	<p><b>LEVEL 3: OPTIMIZE</b></p> <p><b>Physicians and Financial Planning – Making it a Reality</b></p> <p><i>Demonstrate how organizations can use StrataJazz tools to incorporate into their Physician Financial Planning cycle, in both the budgeting and long range planning processes.</i></p> <p><b>KATIE THOMAS</b>                  Director Financial Planning                  WellStar Health System</p> <p><b>MAIBEL BAILEY</b>                  Director Financial Operations                  Wellstar Medical Group</p> <p><b>SARAH SANTILLI</b>                  Sr. Consultant - Implementation                  Strata Decision Technology</p> <p><b>DEBRA REITZ</b>                  Sr. Consultant - Optimization                  Strata Decision Technology</p>
10:15 – 10:30 a.m.	<b>Break</b>		

**THURSDAY, OCTOBER 23, 2014**

10:30 - 12:00 p.m.	LEVEL 1: IMPLEMENT	LEVEL 2: EMPOWER	LEVEL 3: OPTIMIZE
	<p><b>Taking Your Data to the Next Dimension</b></p> <p><i>Introduce fundamental concepts of how the StrataJazz database is structured. Provide insight on how to best configure dimensions and data by reviewing client success stories and answer common data integration questions.</i></p> <p><b>KENNETH HATCHER</b> Accounting &amp; Budgeting West Virginia United Health System</p> <p><b>DIVYA KONDAVEETI</b> Data Integration Consultant Strata Decision Technology</p> <p><b>JOSH GOODMAN</b> Sr. Consultant - Implementation Strata Decision Technology</p>	<p><b>Data Management: Changing the Game</b></p> <p><i>Provides an overview of data management in StrataJazz including loading data, checking exceptions, updating dimensions and data flow through the system.</i></p> <p><b>HALLIE KLEIN</b> Consultant - Implementation Strata Decision Technology</p> <p><b>DAVID MOLDAWER</b> Sr. Consultant - Implementation Strata Decision Technology</p>	<p><b>Optimize Your Capital Portfolio</b></p> <p><i>Demonstrate how organizations have utilized the StrataJazz Evaluation and Optimization tools to put more structure and analytics behind the capital decision-making process.</i></p> <p><b>DEVIN BACHELDER</b> Decision Support &amp; Budget Supervisor Northwestern Medical Center</p> <p><b>LINDSEY CASTLEMAN-ZIA</b> Sr. Consultant - Implementation Strata Decision Technology</p> <p><b>AMIN HEMANI</b> Sr. Consultant - Optimization Strata Decision Technology</p>
<p>12:00 – 12:45 p.m. <b>Lunch</b></p>			
<p>12:45 – 2:15 p.m.</p>	<p><b>Users, Security and Workflow: The Basics</b></p> <p><i>Overview of how security is designed, the relationship to process workflow, and tips on how to apply this functionality at your organization.</i></p> <p><b>JASON PISANI</b> Sr. Project Analyst New Hanover Regional Medical Center</p> <p><b>WOODY BOYD</b> Finance Data Systems Manager Mission Health</p> <p><b>HUNG NGUYEN</b> Manager, Optimization Consulting Strata Decision Technology</p>	<p><b>Managing Users, Security and Workflow</b></p> <p><i>Learn how to manage users and their system access, as well as common workflow scenarios such as calculating routing and manually moving projects from step to step.</i></p> <p><b>EMAAD SHEHZAD</b> Consultant - Optimization Strata Decision Technology</p> <p><b>JAMI EDDINGTON</b> Sr. Consultant - Implementation Strata Decision Technology</p>	<p><b>Next Level Reporting within Decision Support</b></p> <p><i>Discuss the power of reporting using the StrataJazz Ad Hoc Reporter by showcasing advanced report techniques, improving data visualization, and empowering users.</i></p> <p><b>MARGIE WHITTIER</b> Manager, Decision Support Fairview Health Services</p> <p><b>LEON CORBEILLE</b> Manager, Implementation Consulting Strata Decision Technology</p> <p><b>JACLYN SPITZ</b> Consultant - Optimization Strata Decision Technology</p>