

SUMMIT AGENDA:

BENDING THE COST CURVE

Swissotel, Chicago, IL

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

TUESDAY, OCTOBER 21, 2014

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

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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>Implementing StrataJazz Decision Support: A Model for Successful Implementation (1 CPE)</p> <p>LAURA DOUCETTE Director of Reimbursement and Decision Support Boston Children’s Hospital</p> <p>SUZANNE MCDERMOTT Sr. Director of Operations and Decision Support Physicians’ Organization Boston Children’s Hospital</p>	<p>A Strategic Approach to a Budgeting Timeline (1 CPE)</p> <p>ALICIA MAZON Lead - Accounting & Budgeting West Virginia United Health System</p>	<p>Product Demonstration: Using StrataJazz for Scenario Based Planning</p> <p>Strata Decision Technology</p>
<p>1:50 – 2 p.m. Break</p>			
<p>2 – 2:50 p.m.</p>	<p>Using Data Analytics to Drive Organizational Success (1 CPE)</p> <p>ROBIN AWALT Director of Cost Accounting / Financial Analysis Conway Medical Center</p> <p>BRIAN FESKE Decision Support Analyst Conway Medical Center</p>	<p>Best Practices in Physician Budgeting (1 CPE)</p> <p>NICOLE ASHE Vice President and CFO Wellstar Medical Group</p> <p>MARIBEL BAILEY Director Financial Operations Wellstar Medical Group</p> <p>KATIE THOMAS Director of Financial Planning Wellstar Health System</p>	<p>Group Therapy: Capital Planning User Group Workshop (1 CPE)</p> <p>Strata Decision Technology</p> <p>RICHARD BURRSTON Corporate Capital Budget Director Intermountain Healthcare</p>
<p>2:50 – 3 p.m. Break</p>			
<p>3 – 3:50 p.m.</p>	<p>Product Demonstration: Using StrataJazz to Improve Cost Accounting</p> <p>Strata Decision Technology</p>	<p>Establishing a System Wide Operating Budgeting Process (1 CPE)</p> <p>JAYMES CHENEY Sr. Budget / Reimbursement Analyst Adventist Health</p> <p>CHRIS JONES Sr. Financial Analyst Adventist Health</p>	<p>Group Therapy: Strategic Planning User Group Workshop (1 CPE)</p> <p>Strata Decision Technology</p> <p>MEAGHAN LUTTS Director, Business Intelligence & Financial Analytics The Children’s Hospital of Philadelphia</p>
<p>6 – 9 p.m. Dinner Reception – Navy Pier</p>			

WEDNESDAY, OCTOBER 22, 2014

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

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

LEVEL 1	<p>Implement:</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
LEVEL 2	<p>Empower:</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
LEVEL 3	<p>Optimize:</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.	Breakfast – Vevey 1		
8:45 – 10:15 a.m.	<p>LEVEL 1: IMPLEMENT</p> <p>System Rollout: Keys to a Successful Implementation</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>TIM TAYLOR Director, Financial Analysis Systems Forest Park Medical Center</p> <p>CAITLIN ILES Project Manager Strata Decision Technology</p> <p>CHRIS BARTH Sr. Consultant - Implementation Strata Decision Technology</p>	<p>LEVEL 2: EMPOWER</p> <p>How to be a PRO at Managing Assumptions</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>ROSE LISCOVITZ Consultant - Optimization Strata Decision Technology</p> <p>SHIKHA MEHRA Sr. Business Analyst Strata Decision Technology</p>	<p>LEVEL 3: OPTIMIZE</p> <p>Physicians and Financial Planning – Making it a Reality</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>KATIE THOMAS Director Financial Planning WellStar Health System</p> <p>MAIBEL BAILEY Director Financial Operations Wellstar Medical Group</p> <p>SARAH SANTILLI Sr. Consultant - Implementation Strata Decision Technology</p> <p>DEBRA REITZ Sr. Consultant - Optimization Strata Decision Technology</p>
10:15 – 10:30 a.m.	Break		

THURSDAY, OCTOBER 23, 2014

10:30 - 12:00 p.m.	LEVEL 1: IMPLEMENT	LEVEL 2: EMPOWER	LEVEL 3: OPTIMIZE
	<p>Taking Your Data to the Next Dimension</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>KENNETH HATCHER Accounting & Budgeting West Virginia United Health System</p> <p>DIVYA KONDAVEETI Data Integration Consultant Strata Decision Technology</p> <p>JOSH GOODMAN Sr. Consultant - Implementation Strata Decision Technology</p>	<p>Data Management: Changing the Game</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>HALLIE KLEIN Consultant - Implementation Strata Decision Technology</p> <p>DAVID MOLDAWER Sr. Consultant - Implementation Strata Decision Technology</p>	<p>Optimize Your Capital Portfolio</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>DEVIN BACHELDER Decision Support & Budget Supervisor Northwestern Medical Center</p> <p>LINDSEY CASTLEMAN-ZIA Sr. Consultant - Implementation Strata Decision Technology</p> <p>AMIN HEMANI Sr. Consultant - Optimization Strata Decision Technology</p>
Lunch			
12:00 - 12:45 p.m.	Lunch		
12:45 - 2:15 p.m.	<p>Users, Security and Workflow: The Basics</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>JASON PISANI Sr. Project Analyst New Hanover Regional Medical Center</p> <p>WOODY BOYD Finance Data Systems Manager Mission Health</p> <p>HUNG NGUYEN Manager, Optimization Consulting Strata Decision Technology</p>	<p>Managing Users, Security and Workflow</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>EMAAD SHEHZAD Consultant - Optimization Strata Decision Technology</p> <p>JAMI EDDINGTON Sr. Consultant - Implementation Strata Decision Technology</p>	<p>Next Level Reporting within Decision Support</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>MARGIE WHITTIER Manager, Decision Support Fairview Health Services</p> <p>LEON CORBEILLE Manager, Implementation Consulting Strata Decision Technology</p> <p>JACLYN SPITZ Consultant - Optimization Strata Decision Technology</p>