

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	Vevey 2
TRACK 2	Operating Budgeting: Optimize and Advance Your Organization Through a More Flexible and Comprehensive Budgeting Process	Vevey 3
TRACK 3	Capital & Strategic Planning: Gain Control and Improve Flexibility in Capital Planning and Plan for the Future	Vevey 4

TUESDAY, OCTOBER 21, 2014

8 – 9 a.m.	Breakfast – Zurich Ballroom		
9 – 10:30 a.m.	Keynote Session: Bending the Cost Curve (1 CPE) – Zurich Ballroom DAN MICHELSON Chief Executive Officer Strata Decision Technology		
10:30 – 11 a.m.	Break		
11 – 11:50 a.m.	TRACK 1: DECISION SUPPORT & COST REDUCTION A Journey to Operating at Medicare Margins (1 CPE) MIKE SITOWITZ Controller Parrish Medical Center	TRACK 2: OPERATING BUDGETING 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	TRACK 3: CAPITAL & STRATEGIC PLANNING Product Demonstration: Using StrataJazz for Equipment Replacement Planning Strata Decision Technology <i>(this session repeats on 10/22 at 2pm)</i>
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>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>KATIE CUNNINGHAM 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>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

7:45 – 8:30 a.m.	Breakfast – Zurich Ballroom		
8:30 – 9:40 a.m.	Keynote Session: The Greatest Healthcare Story Ever Told – Zurich Ballroom GEORGE LOMBARDI, MD		
9:40 – 10:00 a.m.	Break		
10 – 10:50 a.m.	TRACK 1 – DECISION SUPPORT & COST REDUCTION 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>	TRACK 2 – OPERATING BUDGETING Group Therapy: Management Reporting User Group Workshop (1 CPE) Strata Decision Technology SCOTT REED Director of Finance Norton Healthcare	TRACK 3 – CAPITAL & STRATEGIC PLANNING 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) BEN SHAH Director of Finance Legacy Health	Group Therapy: Operating Budgeting User Group Workshop (1 CPE) Strata Decision Technology SCOTT REED Director of Finance Norton Healthcare	Shifting from a Bottom-Up to Top-Down Forecasting Process (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) MIKE RILEY Vice President, Performance Analytics Children's Healthcare of Atlanta	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>GREG DAMRON CFO Georgia Regents Health System</p> <p>LARRY DREILING Manager, Performance & Operational Improvement Georgia Regents Health System</p>	<p>Product Demonstration: Using StrataJazz for Equipment Replacement Planning (1 CPE)</p> <p>Strata Decision Technology</p> <p><i>(this session repeats on 10/21 at 11am)</i></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>Best Practices in Service Line Budgeting (1 CPE)</p> <p>COLLIN MCNULTY Manager of Financial Planning & Analysis Fairview Health Services</p> <p>KRIS TUSETH Director of Reimbursement and Revenue Accounting Fairview Health Services</p>	<p>Product Demonstration: Using StrataJazz to Improve Capital Planning</p> <p>Strata Decision Technology</p>

LEVEL 1	Implement: 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.	Vevey 2
LEVEL 2	Empower: Provides hands-on StrataJazz training. Led by Strata Decision consultants. Recommended for users who are using the system for their first year.	Vevey 3
LEVEL 3	Optimize: 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.	Vevey 4

THURSDAY, OCTOBER 23, 2014

8 – 8:45 a.m. Breakfast – Vevey 1			
8:45 – 10:15 a.m.	LEVEL 1: IMPLEMENT System Rollout <i>Discuss keys to a successful implementation rollout and how to avoid common pitfalls. Topics include setting expectations, organizational buy-in and post go-live communication.</i> TIM TAYLOR Director, Financial Analysis Systems Forest Park Medical Center CAITLIN ILES Project Manager Strata Decision Technology JOHN LIM Consultant - Implementation Strata Decision Technology	LEVEL 2: EMPOWER User and Security Management <i>Walk-through of using Data Studio 2.0 to manage data and assumptions centrally across plans. Will cover global assumption management and mass assumption shifts.</i> ROSE LISCOVITZ Consultant - Optimization Strata Decision Technology SHIKHA MEHRA Sr. Business Analyst Strata Decision Technology	LEVEL 3: OPTIMIZE Strategic Planning and Operating Budgeting Physician Planning <i>Demonstrate how organizations can use StrataJazz tools to budget at the global service line and department provider level.</i> SARAH SANTILLI Sr. Consultant - Implementation Strata Decision Technology DEBRA REITZ Sr. Consultant - Optimization Strata Decision Technology
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>Data and Dimensions</p> <p><i>Introduction to the fundamental concepts of how the StrataJazz database is structured. Provides insight on how to best configure dimensions and data in the system.</i></p> <p>ADITYA MALHOTRA Project Manager Strata Decision Technology</p> <p>JOSH GOODMAN Sr. Consultant - Implementation Strata Decision Technology</p>	<p>Data Management</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>DAVID YORKE Consultant - Optimization Strata Decision Technology</p> <p>DAVID MOLDAWER Sr. Consultant - Implementation Strata Decision Technology</p>	<p>Capital Planning Evaluation and Optimization</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			
12:45 – 2:15 p.m.	<p>Users, Security and Workflow</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>Users, Security and Workflow</p> <p><i>Training on how to add, remove and edit users and their system access. Provide tips to keeping security simple while still meeting key information and processes secured.</i></p> <p>EMAAD SHEHZAD Consultant - Optimization Strata Decision Technology</p> <p>JAMI EDDINGTON Sr. Consultant - Implementation Strata Decision Technology</p>	<p>Decision Support Ad-Hoc Reporter</p> <p><i>Provides an overview a self-service reporting and analytics approach for end users using the StrataJazz Ad Hoc Reporter tool.</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>