

SCOTTSDALE INSTITUTE

Annual

2002
CONFERENCE

**Marriott's Camelback Inn
Scottsdale, Arizona**

April 18-20, 2002

WHO SHOULD ATTEND?

This conference is designed to be an interactive experience for SCOTTSDALE INSTITUTE member executive teams as they implement significant culture change, driven by such issues as patient safety and the professional personnel shortage, as well as large-scale transformation of both clinical and business processes. Along with the CEO and CIO, we highly encourage attendance by the COO, CMO, CFO and other key members of the executive team as well as trustees.

CONFERENCE DESIGN & OBJECTIVES

Participants in this conference will:

- Learn from industry leaders about managing and leading culture change; hear case studies from those who are achieving this highly valued goal.
- Gain valuable insights from a CEO Round Table of industry leaders as they discuss their top issues and solutions.
- Share information about patient safety efforts; get insights from the Leapfrog Group and IOM, as well as from members who are leading successful implementations.
- Learn about transformation; the combination of culture change, technology and tool deployment and process redesign to achieve complete restructuring of clinical and financial functions. Hear from executives who are out in front of this important opportunity.
- Share your ideas, achievements and lessons learned with peers in special, executive focus sessions. These meetings will be held for CEOs, Clinician Executives, and CIOs.
- Have the opportunity to exchange ideas with all attendees; active participation and networking is an important part of our purpose.

INFORMATION

TO REGISTER FOR THE CONFERENCE

Please send a completed registration form via fax, phone, email or mail to: SCOTTSDALE INSTITUTE, 1660 South Highway 100, Suite 140, Minneapolis, MN 55416

Phone 952.545.5880, Fax 952.545.6116.

*Please call the hotel to reserve your room—
see hotel reservation information*

GOLF REGISTRATION

Please see registration form for details.

WELCOME RECEPTION AND DINNER

A welcome reception will be held on **Thursday evening, April 18**, from 7:00 p.m. to 9:00 p.m. Please check hotel meeting room schedule for reception area location.

Dinner will be held on **Friday evening, April 19**, with a reception starting at 7:00 p.m. and dinner starting at 7:45 p.m. Location will be announced.

Spouses and guests are welcome.

CONFERENCE SESSIONS

Special CEO, Clinician Executive and CIO sessions will be held on **Thursday, April 18**, with the General Session beginning on **Friday, April 19** and ending **Saturday, April 20**.

HOTEL RESERVATIONS

Hotel reservations must be made directly with the Marriott's Camelback Inn at **1.800.242.2635**.

A *limited* number of rooms are available at a reduced rate. Room reservations must be made through the Marriott's Camelback Inn **on or before Tuesday, March 19, 2002**, after which time they will be accepted on a space-available basis only. Individuals are responsible for room charges, surcharges and tax.

**Marriott's Camelback Inn
5402 East Lincoln Drive
Scottsdale, AZ 85253**

To reserve a room, please call 1.800.242.2635

You must identify that you are with the SCOTTSDALE INSTITUTE conference to receive the special reduced rate. Room rates are \$245 Single/Double (applicable April 18 and 19).

CANCELLATION OF HOTEL RESERVATION

To avoid penalty for cancellation, individuals must notify the Marriott's Camelback Inn within 10 days in advance of stay.

OTHER ACTIVITIES

Jeep Tours, Horseback Riding, Tennis, Spa Services and more can be arranged. Contact the Camelback Inn concierge for information at 1.800.242.2635.

CONFERENCE PROGRAM

“FROM STRATEGY TO REALITY—LEADING THE CULTURAL TRANSFORMATION”

Strategy is relatively easy; the question is how to implement a new vision? What are the cultural barriers to adoption of technology and other solutions proven in other industries? What are the factors that need to be considered in understanding and leading the changes that will be required of all healthcare professionals? The focus of this conference will be on practical examples of how you can lead culture change.

Thursday, April 18

1:00 p.m. – 5:00 p.m. Executive Focus Sessions

- ◆ **CEO Group: *Information Exchange***—Stan Nelson, Chairman, *Scottsdale Institute*, Minneapolis, MN / Scottsdale, AZ, *Facilitator*
- ◆ **Clinician Executive Group: *Improving Clinical Performance***—David Callender, MD, Executive Vice President and COO, *U.T.M.D. Anderson Cancer Center*, Houston, TX, *Facilitator*
- ◆ **CIO Group: *Benefits Realization***—Eric Yablonka, Chief Information Officer, *University of Chicago Hospitals and Health System*, Chicago, IL, *Facilitator*

7:00 p.m. Welcome Reception—Spouses Welcome

Friday, April 19

7:00 a.m. – 7:45 a.m. Continental Breakfast

7:45 a.m. – 8:00 a.m. Welcoming and Opening Remarks

- ◆ Stan Nelson, Chairman, *Scottsdale Institute*, Minneapolis, MN / Scottsdale, AZ

8:00 a.m. – 10:00 a.m. *Leading the Culture Change: We Know What to Do; Will Our Culture Let Us Do It?*

Keynote Address—Dave Burik, President, *Tiber Group*, Chicago, IL

Expert Panel Discussion: The panel members will comment on the keynote address and share their approach to **Strategic Planning and the Related Culture Change Management**. In the following discussion, conference attendees will share their experience and views concerning how to help professional staff and all employees and partners understand, buy into, and contribute to new visions, new businesses, and the constantly changing healthcare landscape.

- ◆ **Facilitator**—Dave Burik

Panel Members:

- ◆ Peter Chalke, President and CEO, *Central Maine Healthcare Corp.*, Lewiston, ME
- ◆ Gary Kaatz, President and CEO, *Rockford Health System*, Rockford, IL
- ◆ Peter Maddox, Senior Vice President, Business, Strategy and Corporate Development, *CHRISTUS Health*, Irving, TX
- ◆ Joe Toomey, President and CEO, *Resurrection Health Care*, Chicago, IL

10:00 a.m. – 10:15 a.m. Break

10:15 a.m. – 12:00 p.m. *Trends and Issues Facing CEOs*

Introduction to Topic—Don Wegmiller, President and CEO, *The Healthcare Group*, a division of *Clark/Bardes Consulting*, a National Executive Compensation and Benefits Consulting Firm

CEO Panel: Our “perennial” session, the **Annual CEO Panel** that describes top challenges, issues, insights and success stories. This is a lively session, and we anticipate the usual participation from all conference attendees!

- ◆ **Facilitator**—Don Wegmiller

Panel Members:

- ◆ David Campbell, **FACHE**, President and CEO, *Saint Vincent Catholic Medical Centers*, New York, NY
- ◆ Peter Fine, **FACHE**, President and CEO, *Banner Health System*, Phoenix, AZ
- ◆ James Leonard, MD, President and CEO, *Carle Foundation*, Urbana, IL
- ◆ Brock Nelson, Chief Executive Officer, *Children's Hospitals and Clinics*, Minneapolis, MN

12:00 p.m. – 1:00 p.m. Attendee Luncheon

12:00 p.m. – 2:00 p.m. Luncheon for Spouses and Guests of Members

1:00 p.m. – 3:00 p.m. *Clinical Transformation: Implementing and Optimizing Clinical Technologies*

Introduction to Topic—Marvin Pember, Executive Vice President and CFO, *Clarian Health*, Indianapolis, IN

Panel Discussion: Clinical Transformation—the people, process and culture change management that is required when implementing clinical tools and dealing with emerging technologies. This panel features executives with responsibility for achieving clinical results through investments in technology combined with culture and process change.

- ◆ **Facilitator**—Mitch Morris, MD, Vice President, *First Consulting Group*, Houston, TX

Panel Members:

- ◆ David Callender, MD, Executive Vice President and COO, *U.T.M.D. Anderson Cancer Center*, Houston, TX
- ◆ Robert Gunn, President and CEO, *PhysicianAccess.Com*, Los Gatos, CA
- ◆ Jeff Rose, MD, Physician Executive Director-Care Transformation Practice, *Cerner Corporation*, Kansas City, MO
- ◆ Ed Septimus, MD, Medical Director, Infectious Disease, Occupational Health and Pharmacy, *Memorial Hermann Healthcare System*, Houston, TX

3:00 p.m. – 3:15 p.m. Break

3:15 p.m. – 5:00 p.m. **Nursing Shortage: Focus on Technology, Using Technology to Help Address the Professional Shortage**

Introduction to Topic—Jim Bentley, Senior Vice President for Strategic Policy Planning, *AHA*, Washington, D.C.

Panel Discussion: The Nursing/Workforce Shortage, and how IT can be used to help address this as well as the culture change issues. This panel features executives who have ownership of this issue and its potential solutions in their organizations. Everyone needs new ideas, so be prepared to share your initiatives and successes, whether you are a panel member or not!

◆ **Facilitator—Jim Bentley**

Panel Members:

- ◆ **George Block, MD, CPE**, Medical Director, UR, *Sequoia Hospital* and Physician Advisor to *Sensitron*, San Mateo, CA
- ◆ **Jan Commens**, Executive Director, Quality and Patient Care, *Ascension Health*, St. Louis, MO
- ◆ **Linda Kresge**, Chief Nursing Executive, *Catholic Healthcare West*, Redwood City, CA
- ◆ **Ann Schrader**, Chief Operating Officer, *HealthEast*, St. Paul, MN

5:00 p.m. Open Time

7:00 p.m. Reception

7:45 p.m. Membership Dinner—Spouses Welcome

Saturday, April 20

7:30 a.m. – 8:00 a.m. Continental Breakfast

8:00 a.m. – 10:00 a.m. **Patient Safety Case Studies**

- ◆ **Engaging the Board and the Executive Team**
- ◆ **Implementation of Leapfrog / Joint Commission Requirements**
- ◆ **Leading the Process and Culture Change**

Introduction to Topic—Donna Payne, Senior Vice President, Pediatric Informatics, *Child Health Corporation of America*, Overland Park, KS

Panel Discussion: Building a Culture of Safety, Supported by Technology—Your perspectives on the massive culture change required in this area will be a highlight of the conference, and has been the subject of much discussion during our informatics conference calls. This panel of CEOs, CMOs, CIOs and other clinical leaders charged with overall Safety Initiatives, will speak to culture change challenges, successes and lessons learned. Last year's Safety Panel will be hard to beat, but we are sure the culture challenge will engage everyone.

- ◆ **Facilitator—David Classen, MD**, Vice President, *First Consulting Group*, Salt Lake City, UT; Associate Professor of Medicine, *University of Utah*; Member IOM Committee for the *National Healthcare Quality Report*

Panel Members:

- ◆ **Avery Cloud**, Vice President and CIO, *Integris Health*, Oklahoma City, OK
- ◆ **John Fields**, Vice President Operations/Support, *Central Maine Healthcare Corp.*, Lewiston, ME
- ◆ **Tejal Gandhi, MD, M.P.H.**, Director of Patient Safety, Division of General Medicine, *Brigham and Women's Hospital*, Boston, MA
- ◆ **Don Kooy**, Chief Information Officer, *McLaren Health Care Corporation*, Flint, MI
- ◆ **Gil Kuperman, MD, Ph.D.**, Associate Director, Clinical Systems Research and Development, *Partners HealthCare System*, Chestnut Hill, MA
- ◆ **James White, MD**, Managing Director of Medical Affairs and CMO, *Integris Health*, Oklahoma City, OK
- ◆ **Daniel Winship, MD**, Vice Chancellor for Health Affairs and CEO, *University of Missouri Health Care* and Founding Member of the *Patient Safety Institute*, Columbia, MO
- ◆ **Concluding Observations and Commentary—Gordon Sprenger**, Past President, *Allina Health System*, Minneapolis, MN

10:00 a.m. – 10:30 a.m. Break

10:30 a.m. – 12:00 p.m. **Culture Change and Process Redesign in Transforming the Revenue Cycle**

Introduction to Topic—Dale Stockamp, President and CEO, *Stockamp & Associates, Inc.*, Lake Oswego, OR

Panel Discussion: Management and Culture—the people, processes and tools. This panel of CEOs and CFOs will share how they have fundamentally changed all aspects of their Revenue Cycle to create sustainable benefits. Results as well as process and culture change issues will be addressed.

- ◆ **Facilitator—Bill Young, Jr.**, Advisor, *Central Maine Healthcare Corp.*, Lewiston, ME

Panel Members:

- ◆ **Bob Clarke**, President and CEO, *Memorial Health System*, Springfield, IL
- ◆ **Gary Fennessy**, Vice President Finance and Interim CFO, *Northwestern Memorial Hospital*, Chicago, IL
- ◆ **Rick Fullmer**, Executive Director, *University of Utah Hospitals and Clinics*, Salt Lake City, UT
- ◆ **David Haray**, Vice President, Patient Financial Services, *Stanford Hospital and Clinics & Lucile Packard Children's Hospital*, Stanford, CA
- ◆ **Guy Orne**, Executive Vice President, Finance and CFO, *Central Maine Healthcare Corp.*, Lewiston, ME

12:00 p.m. Closing Remarks

- ◆ **Stan Nelson**, Chairman, *Scottsdale Institute*, Minneapolis, MN / *Scottsdale*, AZ

1:00 p.m. Golf for Those Who are Pre-registered

CONFERENCE REGISTRATION FORM

SCOTTSDALE INSTITUTE ANNUAL CONFERENCE

APRIL 18-20, 2002

MARRIOTT'S CAMELBACK INN, SCOTTSDALE, ARIZONA

One registrant and spouse per form please. Photocopies accepted. Please Type or Print

Mr. M.D.

Ms./Mrs. D.O.

Ph.D. OTHER _____

NAME OF REGISTRANT _____
LAST FIRST MI

NAME TO APPEAR ON BADGE _____

TITLE _____

SPOUSE / OTHER _____
LAST FIRST MI

NAME TO APPEAR ON BADGE _____

ORGANIZATION _____

ADDRESS _____

CITY _____ STATE _____ ZIP _____

TELEPHONE _____ / _____ FAX _____ / _____

EMAIL _____ CONTACT IN CHARGE OF ARRANGEMENTS _____

I ___/WE ___ WILL BE ATTENDING THE WELCOME RECEPTION ON **THURSDAY, APRIL 18** AT 7:00 P.M. YES NO

MY SPOUSE/GUEST WILL BE ATTENDING THE SPECIAL LUNCHEON ON **FRIDAY, APRIL 19** FROM NOON TO 2:00 P.M. YES NO

I ___/WE ___ WILL BE ATTENDING THE COCKTAIL RECEPTION AND DINNER ON **FRIDAY, APRIL 19** STARTING AT 7:00 P.M. YES NO

Fee: This conference is open to SI members at no charge. Conference Attire: Business Casual

GOLF REGISTRATION – MARRIOTT'S CAMELBACK INN

Golf will begin at 1:00 p.m. on Saturday, April 20. A limited number of slots are available. Reservations must be made through the Scottsdale Institute by **Friday, April 12**. Individuals are responsible for fees, rentals and tax.

Please Note: If you fail to *cancel* by **Wednesday, April 17**, you will be charged for play.

CARDHOLDER NAME _____

VISA MASTERCARD AMERICAN EXPRESS CARD NUMBER _____ EXPIRATION DATE _____

SIGNATURE OF CARDHOLDER (REQUIRED) _____

Please indicate if **YOU** will golf Saturday, April 20, 2002: Yes No _____ Handicap

Need club rental? Yes: Left Hand Right Hand No

SPOUSE / OTHER golf Saturday, April 20, 2002 Yes No _____ Handicap

Need club rental? Yes: Left Hand Right Hand No

Please indicate your preferences for golf partners. We will do our best to accommodate your request but cannot guarantee pairings.

1. _____

2. _____

Golf Attire: collared shirt with slacks or hemmed mid-length shorts. 3. _____

Please return your conference & golf reservation requests via fax, phone, email or mail to:

Scottsdale Institute, 1660 South Highway 100, Suite 140, Minneapolis, MN 55416

Phone: 952.545.5880 Fax: 952.545.6116 Email: scottsdale@fcg.com