Cleverley + Associates is happy to share its hospital industry expertise in a speaking capacity through our “Expertise in Action” series. Our staff collectively boasts vast experience on the following topics:

- Improving Medicare profitability
- Developing justifiable and profitable pricing
- Leveraging performance metrics to enhance profitability
- Analyzing market-specific indicators of the hospital industry
- Answering top questions for healthcare financial management
- Recovering missed reimbursement via improved coding and billing

In addition, our extensive hospital databases allow us to custom-create presentations to address relevant issues in your market.

Whatever your executive educational needs, we have a suitable platform, from 1-hour web educational sessions to board presentations to full-day seminars.

Not only will we travel on-site to deliver our educational component, but each of our presentations incorporates hospital-specific data.

Top-notch education delivered by industry experts that leverage the power of your hospital’s data - this is how we consistently deliver bottom line: absolute value.
# Our Programs

## CORE SESSIONS (ON-SITE OR WEBINAR)

<table>
<thead>
<tr>
<th>Title</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>The Myths of Strategic Pricing</td>
<td>5</td>
</tr>
<tr>
<td>Billing and Coding: A Focus on Missed Reimbursement &amp; Data Quality</td>
<td>5</td>
</tr>
<tr>
<td>Ten Critical Questions for Healthcare Finance Executives</td>
<td>5</td>
</tr>
<tr>
<td>Performance Parity: When Aligning with the Median Isn’t Good Enough</td>
<td>6</td>
</tr>
<tr>
<td>Ten Ways to Improve Medicare Profitability</td>
<td>6</td>
</tr>
<tr>
<td>State of the Hospital Industry: A Market-Specific Analysis</td>
<td>6</td>
</tr>
</tbody>
</table>

## FULL-DAY SEMINAR

<table>
<thead>
<tr>
<th>Title</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Building Financial Strength Executive Seminar</td>
<td>7-8</td>
</tr>
</tbody>
</table>

## KEY STAFF BIOS

<table>
<thead>
<tr>
<th>Name</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>William O. Cleverley, PhD</td>
<td>9</td>
</tr>
<tr>
<td>James O. Cleverley, MHA</td>
<td>9</td>
</tr>
<tr>
<td>Susan E. White, PhD</td>
<td>10</td>
</tr>
<tr>
<td>Lauree E. Handlon, RHIA, CCS, CPC-H</td>
<td>10</td>
</tr>
<tr>
<td>Kim L. O’Neil, RHIA</td>
<td>11</td>
</tr>
<tr>
<td>Ann M. Zuchowski, RHIA</td>
<td>11</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Name</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>About Cleverley + Associates</td>
<td>12</td>
</tr>
<tr>
<td>Educational Session Scheduling Form</td>
<td>13</td>
</tr>
</tbody>
</table>

For additional information, please email info@ca-education.com.
At Cleverley + Associates, we believe that the key to the mutually beneficial sharing of knowledge and ideas lies in three basic steps:

1. **Collaboration**

2. **Growth**

3. **Results**
bottom line: absolute value
THE MYTHS OF STRATEGIC PRICING

DESCRIPTION
While the issue of strategic pricing continues to gain momentum across the country, the topic has generated a number of ideas that can be misleading and need to be addressed. This session will confront those “myths”.

EDUCATIONAL OBJECTIVES
1. To define the scope and practice of strategic pricing
2. To present common myths surrounding strategic pricing
3. To describe the essentials for effective pricing initiatives

SPEAKERS
Mr. William O. Cleverley, PhD
Mr. James O. Cleverley, MHA

BILLING/CODING: A FOCUS ON MISSED REIMBURSEMENT & DATA QUALITY

DESCRIPTION
Examining patterns in the coding and billing of patient claims data can yield valuable information that assess the accuracy of payment as well as data quality. Most facilities utilize either an internal or external claim ‘scrubber’ to ensure their claims are as accurate as possible, but many opportunities may be missed by not comparing patterns to industry standards. Audience data are incorporated into the presentation.

EDUCATIONAL OBJECTIVES
1. To demonstrate the value in examining patterns in coding and billing data
2. To provide benchmarks for data quality
3. To explore root causes of coding and billing errors

SPEAKERS
Ms. Lauree Handlon, RHIA, CCS, CPC-H
Ms. Kim O’Neil, RHIA
Ms. Ann Zuchowski, RHIA

TEN CRITICAL QUESTIONS FOR HEALTHCARE FINANCE EXECUTIVES

DESCRIPTION
This session will identify ten critical financial questions that are often raised by healthcare boards. The questions address areas of financial performance, profitability and cash targets, and facility-level operational issues of overall cost and price defensibility. The presentation will address each question using actual case-hospital data. Audience data are integrated into the presentation as well.

EDUCATIONAL OBJECTIVES
1. To highlight ten critical questions frequently asked by US hospital governing boards
2. To determine relevant financial metrics to help answer the questions
3. To illustrate how the use of comparative benchmarking can impact current & future organizational performance

SPEAKERS
Mr. William O. Cleverley, PhD
Mr. James O. Cleverley, MHA

For additional information, please email info@ca-education.com.
Core Sessions

Performaace Parity: When Aligning with the Median Isn’t Good Enough

Description
Thoughtful healthcare leaders are increasingly reaching beyond median performance. There are three key dimensions to realizing enhanced organizational results. This session will explore those dimensions using targeted US median values with strategies to propel the hospital past current performance levels.

Educational Objectives
1. To understand how to strengthen overall financial performance
2. To explain strategies for revenue enhancement
3. To highlight cost containment relationships and actions

Speakers
Mr. William O. Cleverley, PhD
Mr. James O. Cleverley, MHA

Ten Ways to Improve Medicare Profitability

Description
Medicare is the largest payer for most US acute-care hospitals; however, contract negotiation is not an option to enhance profitability. This session will identify ten actionable ways to improve the margin on treating patients within this critical payer group without sacrificing quality or ethical standards.

Educational Objectives
1. To highlight US averages for Medicare profitability for inpatient and outpatient care
2. To understand the key drivers for improved Medicare profitability
3. To identify ten actionable strategies for enhancing Medicare profitability

Speakers
Mr. William O. Cleverley, PhD
Mr. James O. Cleverley, MHA

State of the Hospital Industry: A Market-Specific Analysis

Description
The presentation describes the historical financial and operational performance of a given region. Cleverley & Associates will work with your education team to define the hospitals in the market or region in which the presentation will take place. The state of your region’s hospital industry will be explored, including an assessment of potential opportunities and challenges.

Educational Objectives
1. To understand key market factors affecting financial and operational performance
2. To identify actionable strategies for cost containment, revenue enhancement, and financial performance improvement

Speakers
Mr. William O. Cleverley, PhD
Mr. James O. Cleverley, MHA

For additional information, please email info@ca-education.com.
Full-day Seminar

BUILDING FINANCIAL STRENGTH EXECUTIVE SEMINAR

DESCRIPTION
Sustainable growth is the cornerstone for viability in any organization. Hospitals, however, face continued challenges to achieve this in light of increased capital demands, heightened price pressure, and escalating labor and ancillary costs. With so much at stake, the importance of sound financial planning cannot be understated.

Through this unique hands-on seminar, you’ll design a financial plan based on targets that yield long-term success. More importantly, you’ll learn tools to help you achieve those targets.

The seminar’s format includes three core areas:

1 Survey
First we’ll discuss how trends in the US healthcare industry and those in your market will impact your future.

2 Design + Build
Next, you’ll develop a plan that addresses your core growth strategies - and still respects your organization’s ability to implement financially.

3 Manage + Expand
Finally, based on the financial targets set forth in your plan, evaluate opportunities to reach required profitability targets.

DELIVERABLES

Market Pricing Summary
This report looks at hospital charges for pre-selected departments, which are defined using the HCPCS codes listed on the report. The charges are divided by the relative weight of the procedures and listed next to three peers that you select.

Financial Summary Report
A data report highlighting key financial indicators for your organization.

Hospital Dashboard Report
This report offers healthcare executives a means of monitoring key hospital performance drivers by answering two questions: 1) What is the overall financial position of my hospital? 2) What are the individual strengths and weaknesses of the hospital?

Attendees are encouraged to bring their hospital’s most current set of audited financial statements as well as a laptop for interactive portions of the seminar. The laptop and audited data will be used for a hands-on activity in the financial planning session.

SPEAKERS
Mr. William O. Cleverley, PhD
Mr. James O. Cleverley, MHA
Ms. Susan E. White, PhD

For additional information, please email info@ca-education.com.
As a Chief Financial Officer, I receive many invitations to attend conferences. With limited time, finding a valuable experience that meets my needs with sound information, financial tools, and new skills is extremely rare. This seminar is the best conference I have had the privilege to attend that provides useful information and tools. It has not only improved my knowledge, but has helped me improve my hospital’s financial operations.”

Jeff White, CFO; Beaufort Memorial Hospital, Beaufort, SC

The forum was definitely the best seminar I have ever attended. The reports received were invaluable and resulted in a return many times the cost of the seminar. However, perhaps the most impressive value-added part was the one-on-one time spent with Bill and the Cleverley staff. They showed intense interest in my hospital’s financial data and were very helpful in interpreting the reports. It was a first-class seminar with a first-class outcome.”

David Hanen, CFO; Fremont Area Medical Center, Fremont, NE

For additional information, please email info@ca-education.com.
Key Staff

William O. Cleverley, PhD
President

Dr. Cleverley has been the President of Cleverley + Associates since its formation in January 2000. In addition to his professional responsibilities, Dr. Cleverley is also Professor Emeritus at The Ohio State University where he has taught courses in healthcare finance since 1973.

Dr. Cleverley is the author of over 40 books dealing with the application and use of financial management principles and data in healthcare organizations. In addition, he has authored over 150 articles on healthcare financial issues in a wide variety of both academic and professional journals.

James O. Cleverley, MHA
Principal

Mr. Cleverley has been a Principal at Cleverley + Associates since September 2003. Prior to joining the firm, he directed a statewide health services program for a medical association. Mr. Cleverley has written several articles dealing with healthcare financial analysis and application and recently won the Helen Yerger/L. Vann Seawell Best Article Award for his article, “Scorecards and Dashboards: Using Financial Metrics to Improve Performance”.

For additional information, please email info@ca-education.com.
Key Staff

Susan E. White, PhD
VP, Research & Development

Dr. White has been the Vice President of Research & Development for Cleverley + Associates since January of 2000. Dr. White also served as an adjunct faculty member at The Ohio State University where she has taught data analysis courses.

Dr. White has written numerous books and articles regarding the benchmarking of healthcare facilities and the appropriate use of claims data. She has published articles in the areas of outcomes assessment and risk adjustment using healthcare financial and clinical data.

Lauree E. Handlon, RHIA, CCS, CPC-H
Data Quality & Reimbursement Consultant

Lauree E. Handlon, RHIA, CCS, CPC-H, has been a Data Quality & Reimbursement Consultant for Cleverley + Associates since July 2002. Prior to joining the firm, Ms. Handlon was the OCE/NCCI Auditor at The Ohio State University Medical Center. Her primary focus was to investigate and resolve the Outpatient Code Editor errors related to coding and medical necessity issues. She worked closely with APC regulations, guidelines, and updates provided by CMS and the local Fiscal Intermediary. She was the primary source connection between Patient Accounts and Medical Information Management to insure accuracy of outpatient claims.
Key Staff

Kim L. O’Neil, RHIA
Data Quality & Reimbursement Consultant

Ms. Kim O’Neil, RHIA has been a Data Quality & Reimbursement Consultant for Cleverley + Associates since October 2005. Prior to joining the firm, Ms. O’Neil was a Charge Description Master Analyst at The Ohio State University Medical Center. She joined OSUMC in 2001 as the Outpatient Coding/File Services Manager in Medical Information Management. She spent the majority of her time managing the outpatient coding and file services area for the Arthur G. James Cancer Hospital. Ms. O’Neil also monitored unbilled accounts, provided education to the James outpatient coding staff and investigated outpatient claims that were holding for NCCI and OCE edits.

Ms. O’Neil received her degree in Health Information Management and Systems at The Ohio State University in 2001. She was certified as a Registered Health Information Administrator in the fall of 2001. She is also a member of the American Health Information Management Association.

Ann M. Zuchowski, RHIA
Data Quality & Reimbursement Consultant

Ms. Ann Zuchowski, RHIA has been a Data Quality & Reimbursement Consultant for Cleverley + Associates since September 2007. Prior to joining the firm, Ms. Zuchowski was an Assistant Director of Health Information Management at The Ohio State University Medical Center East. She joined OSUMC in 1999 as a Senior Coding Specialist and moved into the Inpatient Coding Manager position in 2000. In this position, Ms. Zuchowski spent the majority of her time managing the inpatient coding for the Medical Center. She also reviewed focused, paired, and transfer DRGs for coding accuracy to ensure proper billing as well as investigated and resolved outpatient claims that were holding for NCCI and OCE edits.

Ms. Zuchowski received her degree in Health Information Management in 1995. She was certified as a Registered Health Information Administrator in the fall of 1995. She is also a member of the American Health Information Management Association.

For additional information, please email info@ca-education.com.
About Cleverley + Associates

Cleverley + Associates exists to enhance the financial position of hospitals so that they can better serve their communities. We accomplish our mission by working with healthcare leaders to provide them with industry and hospital-specific intelligence and by educating them on the changing face of the healthcare industry. Our firm is committed to education as validated by our experience in the area.

It is our belief that significant opportunities for financial improvement remain available to the vast majority of hospitals through insightful review and education, and interpretation of data. Our primary goal is to provide solutions and recommendations to clients that will enhance their financial performance through better pricing decisions, improved coding, capital restructuring, cost and productivity enhancements, and/or investment management changes.

We believe that many hospitals can double their current level of profitability through a thorough, critical review of operations. Our staff of professionals is well qualified to assist in these reviews and help identify areas for substantial improvements in hospital financial performance.

Our Web Site
www.cleverleyassociates.com

Free Hospital Data
www.hospitaldx.com

Web Educational Sessions
cleverleyevents.webex.com

Cleverley + Associates’ Calendar
www.cleverleyassociates.com/calendar.asp

For additional information, please email info@ca-education.com.
# How to Schedule an Educational Session

To schedule any of the Expertise in Action sessions outlined in this brochure, simply fill out the form below and mail or fax it to Cleverley + Associates. For pricing, availability, or general questions, please email us at info@ca-education.com or call us at 888.779.5663.

## 1 CONTACT INFORMATION

<table>
<thead>
<tr>
<th>First Name / Last Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Title / Organization</td>
</tr>
<tr>
<td>Address</td>
</tr>
<tr>
<td>City / ST / Zip</td>
</tr>
<tr>
<td>Phone / Email</td>
</tr>
</tbody>
</table>

## 2 EVENT DETAILS

Please provide us with some brief details regarding your educational session, so that we can ensure your needs are met.

<table>
<thead>
<tr>
<th>Tentative Date(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Audience Size</td>
</tr>
<tr>
<td>Audience Titles</td>
</tr>
<tr>
<td>Event Location</td>
</tr>
<tr>
<td>Budget</td>
</tr>
<tr>
<td>Topics in which you are interested</td>
</tr>
<tr>
<td>Additional Comments/Questions</td>
</tr>
</tbody>
</table>

For additional information, please email info@ca-education.com.
Please note: fees for educational sessions will vary based on duration and format. Please contact Cleverley + Associates for additional details.

info@ca-education.com
888.779.5663