



Toolkit

**Bringing The Future Into Focus: The
2025 *OPEN MINDS* Seminar On Strategic
Planning Best Practices For A
Turbulent Market**



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Bringing The Future Into Focus: Strategic Planning Best Practices For A Turbulent Market: Seminar Toolkit



Monica E. Oss, Chief Executive Officer, *OPEN MINDS*

Thank you for downloading The *OPEN MINDS* Seminar Toolkit, a supplemental guide to Bringing The Future Into Focus: The 2025 *OPEN MINDS* Seminar On Strategic Planning Best Practices For A Turbulent Market, a signature part of The 2025 *OPEN MINDS* Executive Leadership Retreat.

Strategic plans are an essential aspect of continued success. The right plan helps organizations anticipate change, address critical needs, and improve access and outcomes. This toolkit is a supplemental guide to the Bringing The Future Into Focus Seminar featured on September 16, 2025, at The 2025 *OPEN MINDS* Executive Leadership Retreat, and contains a variety of resources to guide you through building, implementing, and evaluating a strategic plan.

Then on September 16, 2025, join industry expert Joseph P. Naughton-Travers, EdM, Senior Associate at *OPEN MINDS* for the live seminar in Gettysburg. This engaging session will explore the three-phase approach to strategy development.

I hope you will take advantage of all the toolkit and seminar has to offer. Feel free to reach out to jnt@openminds.com with any questions on how your organization can develop an effective strategic plan.

Table Of Contents

▪ Organizational Scale As A Strategic Issue: The <i>OPEN MINDS</i> Framework For Growth	Page 4
▪ To Grow & How	Page 5
▪ Reinvention—How To Choose Wisely	Page 6
▪ Plan Your Strategy, Implement Your Plan	Page 7
▪ Aligning Strategy & Services For More Revenue	Page 8
▪ Optimizing Strategy & Operations With Metrics	Page 9
▪ Making Your Strategic Plan A Reality: Building An Effective Strategy Implementation Plan	Page 10
▪ How To Use Scenario-Based Strategic Planning: Preparing For More Than One Possible Future	Page 11
▪ Growth Through Merger As A Revenue Multiplier: The Easterseals PORT Health Case Study	Page 12
▪ Service Line Strategy For Growth: The Catholic Charities Of Santa Clara County Case Study	Page 13

Organizational Scale As A Strategic Issue: The *OPEN MINDS* Framework For Growth

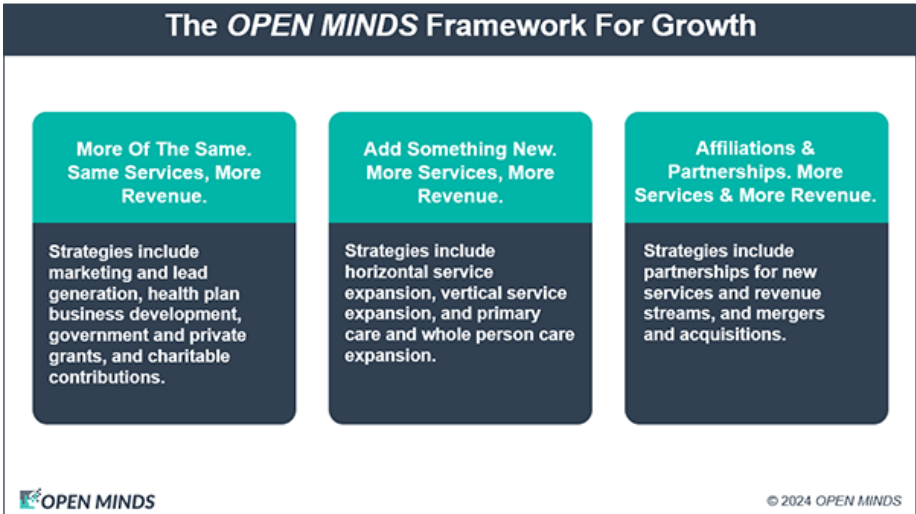
By Joe Naughton-Travers, Ed.M., Senior Associate

Despite high demand for health and human services—particularly for consumers with chronic behavioral, cognitive, and health conditions—provider organizations are not in a great strategic and financial position. From hospitals to primary care clinics to community-based organizations, the picture is rocky, largely due to workforce turbulence, more competition (including both retail players and health plans that are buying and developing their own provider capacity), and an influx of private equity money that has created hundreds of new provider organizations.

Every provider organization needs a growth strategy to increase scale (the optimistic side) and to make up for the loss of market share to these new competitors...

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To Grow & How

By Monica E. Oss, Chief Executive Officer

From a strategy perspective, I'm a fan of growth. In a turbulent market with multiple simultaneous disruptors, organizations need growth for revenue maintenance—for risk limitation through diversification. And I'm not alone. Almost half of chief executive officers (CEOs) said they do not believe their organization would survive more than a decade if they remained on their current path, largely due to new competitors and industry disruption (see [Thriving In An Age Of Continuous Reinvention](#)). The right kind of growth is the solution to that problem.

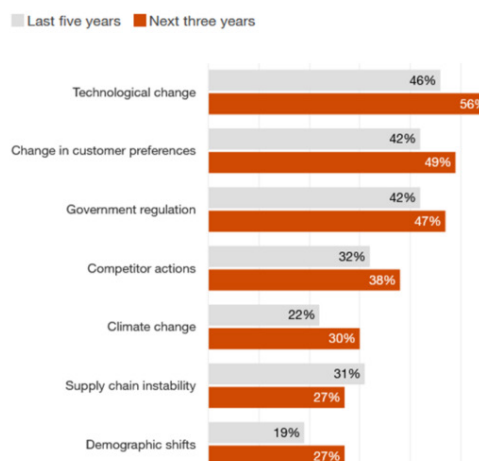
But the specifics matter in creating a solid

growth strategy. Sustainable profitable growth requires executive teams to balance market opportunities (demand) and the capabilities and capacity needed to exploit those opportunities (supply)...

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The Market Factors Driving Changes To Organizational Competitive Advantage



Source: <https://www.pwc.com/gx/en/issues/c-suite-insights/ceo-survey.html>

Reinvention—How To Choose Wisely

By Monica E. Oss, Chief Executive Officer

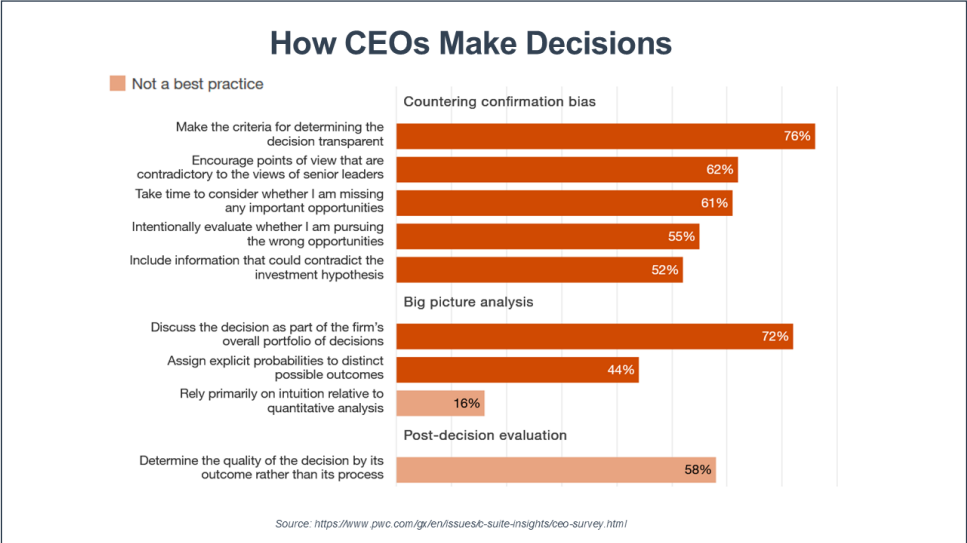
The health and human service market is changing. My colleagues Jon Evans and Paul Duck recently spoke about the change drivers and the implications (see [Successfully Managing Through Chaos: Perspectives For Health Human Service Executives. Part 1: Health Care Policy & Market Trends In 2025](#))—and the uncertainty in the field today. The problem is that the current change is chaotic—and in many ways defies traditional executive decision-making practices.

So, how are C-suite executives choosing to reinvent their organizations in the face of this

change? And how are they making those decisions? That was the focus of an analysis of a recent chief executive officer (CEO) survey, [Reinvention On The Edge Of Tomorrow...](#)

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Plan Your Strategy, Implement Your Plan

By Monica E. Oss, Chief Executive Officer

Scott Fitzgerald said, “An unread book is just a block of paper.” I would argue that an unimplemented strategic plan is equally useless.

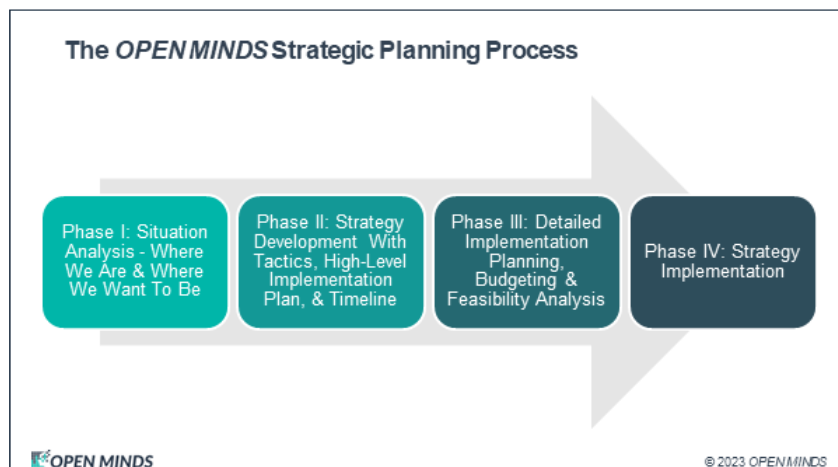
I’m a big believer in strategic plans—for many reasons. The planning process is an opportunity to coalesce an executive team around a common set of goals and path forward, as well as prepare them for unexpected events. The more a market changes or the more competition there is in the market, the more an organization needs a strategic plan. And if an organization is challenged by this market turbulence—in capital, in timing, in talent—having a plan is essential.

But there is much dissatisfaction with strategic

planning. Many executives consider it a waste of time. But I would argue that disaffection is due to two problems. The first is the view of a strategic plan as a static document. Rather, strategy is a dynamic construct that needs to be constantly assessed in terms of its success and continuously adjusted...

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Aligning Strategy & Services For More Revenue

By Monica E. Oss, Chief Executive Officer

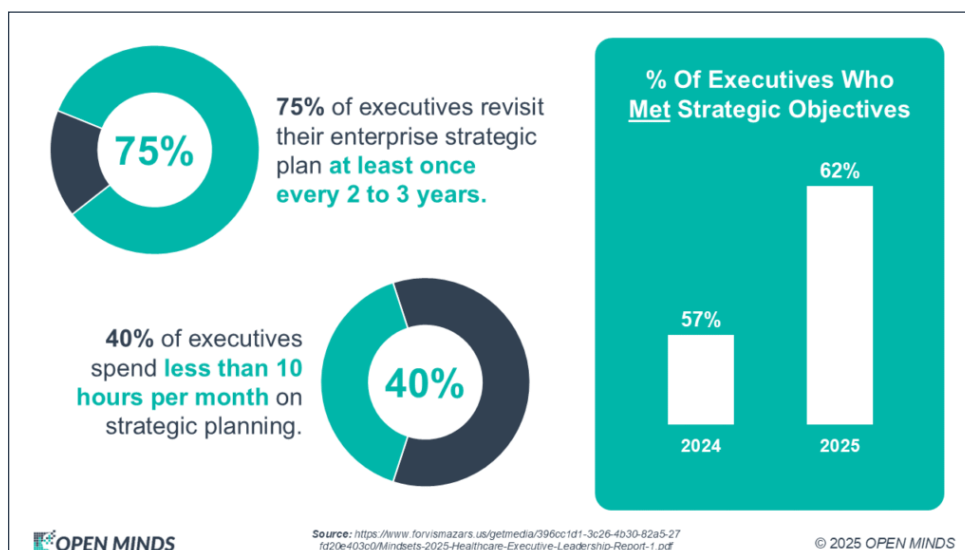
As my news feeds come across my desk every day, a common theme has emerged for 2025: health care provider organization executive concerns are high and market complexity is accelerating. All of us living through the past half of 2025 can likely relate to both of those statements. According to the [Mindsets 2025 Healthcare Executive Leadership Report](#), industry leaders cite regulatory and reimbursement restructuring (34%), workforce instability (32%), economic uncertainty (13%), and revenue cycle and payor mix challenges (6% each) as their primary sources of pressure.

Yet despite these challenges, nearly all

executives (98%) anticipate revenue growth in the coming year. Sixty-seven percent project growth exceeding 5%, and a growing share (62%, up from 57% last year) favor organic expansion over mergers and acquisitions...

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Optimizing Strategy & Operations With Metrics

By Joe Naughton-Travers, Ed.M., Senior Associate

I was just on a call with a colleague who is the administrator for a Southern mental health clinic. She said the psychiatrists in her market refused to return to the office to see consumers in person. Their response to the request to return to the office—“we’re not coming...we have lots of other opportunities to continue to work virtually—for higher wages...” This vignette illustrates the challenges in managing a clinical workforce these days. (For more, see The Clinical Talent Gap and A Formula For Retention).

The easy answer to this workforce situation would be to just pay more—raising the base

compensation rates for clinical team members. But that isn’t always possible. Provider organization executive teams are caught in a margin squeeze. Reimbursement rates have not kept pace with inflation—particularly the inflation in wage rates in recent years...

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Making Your Strategic Plan A Reality: Building An Effective Strategy Implementation Plan

By Joe Naughton-Travers, Ed.M., Senior Associate

“Strategy without tactics is the slowest route to victory. Tactics without strategy is the noise before the defeat.” Sun Tzu, Art of War

Sun Tzu’s Art of War is certainly one of the most famous studies of strategy ever written, and the concept of having a tactical plan for achieving victory—or in health and human services, an organization’s strategy and strategic objectives—applies in today’s business world. Strategy is the plan for achieving victory, while tactics are the specific actions taken on the battlefield to execute that plan. A sound strategy will guide the selection of appropriate tactics,

while effective tactics will help to achieve the strategic objectives. The tactics go together with the strategy. Tactics are where the rubber meets the road...

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Five Steps For Building An Effective Strategy Implementation Plan

1. Translate your strategic objectives into high-level initiatives and steps.
2. Prioritize your initiatives and do the budget dance.
3. Finalize your implementation plan and design your project management operations.
4. Engage your staff and select metrics to drive performance.
5. Keep the focus and adjust your sails.

How To Use Scenario-Based Strategic Planning: Preparing For More Than One Possible Future

By Joe Naughton-Travers, Ed.M., Senior Associate

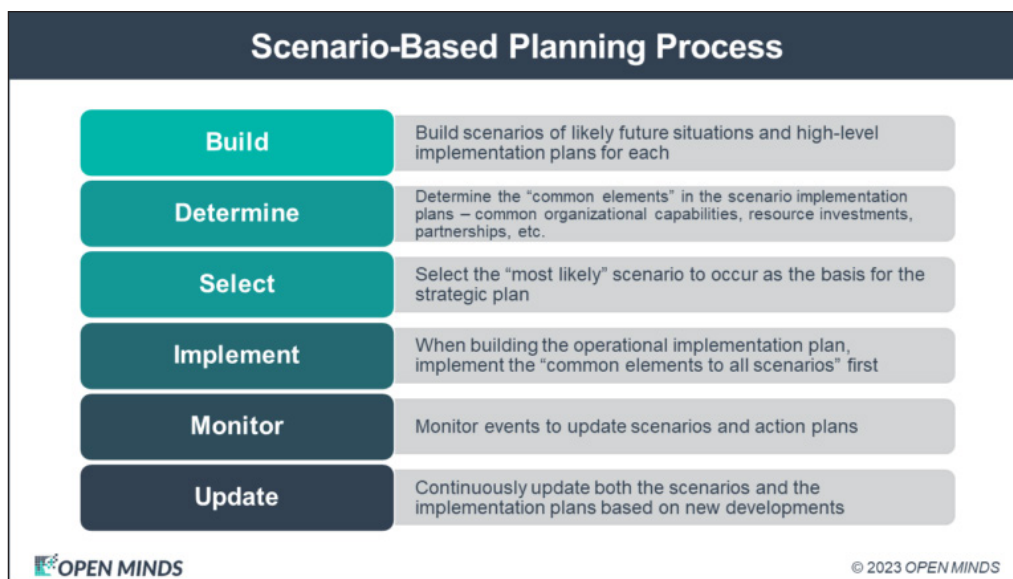
How do you prepare for the future when you don't know exactly what it will look like? This is a question nearly every provider organization executive asks now that workforce challenges, evolving treatment technologies, increased competition and consolidation, and new customer expectations regarding service delivery and financing are endemic to the health and human services market.

"Waiting for the dust to settle" when it comes to strategy isn't a wise management choice.

Instead, scenario-based planning is a tool for planning for multiple futures...

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Growth Through Merger As A Revenue Multiplier: The Easterseals PORT Health Case Study

By Joe Naughton-Travers, Ed.M., Senior Associate

When it comes to mergers and acquisitions (M&A), it's easier to talk about "the perfect deal" than to make that deal work. We recently sat down with Luanne Welch, President and Chief Executive Officer (CEO) for Easterseals PORT Health (ESPH), to discuss her recent work bringing together Easterseals UCP North Carolina & Virginia (ESUCP) and PORT Health Services (PORT Health).

In 2023, PORT Health, a \$28 million non-profit providing services for substance use disorder, mental health, and pharmacy services, became

an affiliate of ESUCP, a \$94 million non-profit providing developmental disability, mental health, and foster care children and family services...

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WHY
PORT Health?
Together Create
Comprehensive
Service
Continuum

2021 Services	Easterseals UCP	PORT Health	Competitor 1	Competitor 2	Competitor 3
ACT	X		X	X	X
ASD Services (ABA)	X				
Care Management	Start up				
Crisis Residential	X		X	X	X
Crisis Residential - Children (IDD)	X				
Day Treatment		X		X	X
Detox Center		X			X
DWI Services				X	
Early Childhood Education	X				
Early Childhood Intervention	X			X	X
Foster Care	X				
Individual (HCB) Support	X		X		X
Intensive In-Home Services	X		X	X	X
IPS	X				
Methadone Maintenance		X			
Medication Assisted Treatment		X			
Medication Management	X	X	X	X	X
Mobile Crisis Management	X		X	X	X
Outpatient Therapy MH	X	X	X	X	X
Outpatient Therapy SUD		X	X	X	X
Pharmacy In-House	X				
Primary Care		X	X		
Psychosocial Rehabilitation			X	X	X
Recreation (IDD)	X				
Residential IDD	X		X		
Residential MH	X		X		
Residential Perinatal		X			
Residential SUD	X		X	X	X
SACOT		X			
SAIOP	X				
School-Based Therapy	X	X		X	X
Specialized Opioid Treatment		X			
Supported Employment	X		X	X	X
Transition Services (Employment)	X				
Walk-In Crisis		X	X	X	X

Service Line Strategy For Growth: The Catholic Charities Of Santa Clara County Case Study

By Kimberly Bond, MS, LMFT, Executive Vice President

In times of market disruption, the importance of disciplined growth cannot be overstated. For executive leaders, success hinges on the ability to continuously evaluate and reprioritize both strategic goals and the organization's service line portfolio. Doing this well enables targeted investment in high-value service opportunities while safeguarding organizational sustainability.

However, service line portfolio management is often among the most challenging responsibilities for a chief executive officer (CEO). Entrenched systems and cultural inertia can hinder necessary shifts. Overcoming this

requires a culture of strategic thinking and a clear-eyed assessment of how services align with consumer needs, operational strengths, and revenue potential...

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