

## 2009

**September 11<sup>th</sup>**5:30PM-6:00PM  
6:00PM-6:45PM6:45PM-8:00PM  
8:00 PM**RETREAT held at the Foundation House**

Reception

Welcome & Course Introduction - *Philip L. Bailin, M.D., M.B.A.*  
& *James K. Stoller, M.D., M.S.*History of the Cleveland Clinic - *John Clough, M.D.*  
Dinner**September 12<sup>th</sup>**7:30AM-8:00AM  
8:00AM-10:00AM  
10:15AM-11:00AM  
11:00AM-11:30AM  
12:30PM-2:30PM**RETREAT held at the Foundation House**

Continental breakfast

Arctic Survival - *William Braun, M.B.A. and James K. Stoller, M.D., M.S.*Business Plan Methodology & Overview – *Philip L. Bailin, M.D., M.B.A.*Implementing Change at the Clinic - *James K. Stoller, M.D., M.S.*

Business plan topic selections &amp; group assignments

**October 9<sup>th</sup>**7:30AM-8:00AM  
8:00AM-4:45PM**Session #1 held at the Foundation House**

Continental breakfast

Anthony Helton, M.B.A. &amp; The Finance Team

**November 13<sup>th</sup>**7:30AM-8:00AM  
8:30AM-10:30AM  
10:30AM-12:00PM  
1:00PM-4:00PM  
4:00PM-4:15PM  
4:15PM-4:30PM  
4:30PM-5:00PM**Session #2 held at the Foundation House**

Continental breakfast

Emotional Intelligence (Part I) - *Deborah O'Neil, Ph.D.*Cleveland Clinic: Present State & Future Opportunities – *Joseph Hahn, M.D.*Emotional Intelligence (Part II) - *Deborah O'Neil, Ph.D.*

Group reflections

Business plan refresher

Business plan group breakout session

**December 11<sup>th</sup>**7:30AM-8:00AM  
8:00AM-4:00PM  
4:00PM-4:15PM  
4:15PM-4:30PM  
4:30PM-5:00PM**Session #3 held at the Foundation House**

Continental breakfast

Health Care Marketing I - *Eric Berkowitz, Ph.D.*

Group reflections

Business plan refresher

Business plan group breakout session

## 2010

**January 15<sup>th</sup>**7:30AM-8:00AM  
8:00AM-4:00PM  
4:00PM-4:15PM  
4:15PM-4:30PM  
4:30PM-5:30PM**Session #4 held at the Foundation House**

Continental breakfast

Health Care Marketing II - *Eric Berkowitz, Ph.D.*

Group reflections

Business plan refresher

Interim Business Plan presentation by each team

**February 12<sup>th</sup>**7:30AM-8:00AM  
8:00AM-4:00PM4:00PM-4:15PM  
4:15PM-4:30PM  
4:30PM-5:00PM**Session #5 held at the Foundation House**Continental breakfast  
Leadership Strategies in the Changing Health System Environment - *Robert Marx, Ph.D.*  
Group reflections  
Business plan refresher  
Business plan group breakout session**March 12<sup>th</sup>**7:30AM-8:00AM  
8:00AM-12:00PM  
1:00PM-2:15PM2:15PM-4:00PM  
4:00PM-4:15PM  
4:15PM-4:30PM  
4:30PM-5:00PM**Session #6 held at the Foundation House**Continental breakfast  
Conflict Resolution - *Colleen Dolgan, R.N., M.A.*  
Innovation at CCF – *Christopher Coburn*  
Conflict of Interest – *Guy Chisolm, Ph.D.*  
Process Improvement – Methods and Health Care Applications - *Darryl Greene, M.S.*  
Strategic Planning Process - *Darryl Greene, M.S.*  
Group reflections  
Business plan refresher  
Business plan group breakout session**April 16<sup>th</sup>**7:30AM-8:00AM  
8:00AM-10:00AM  
10:30AM-11:30AM11:30AM-12:30PM  
1:30PM-3:30PM  
3:30PM-3:45PM  
3:45PM-4:00PM  
4:00PM-4:30PM**Session #7 held at the Foundation House**Continental breakfast  
Legal Issues in Healthcare – *Michael Meehan, J.D.*  
The Patient Experience – A Competitive Differentiator – *Sarah Sinclair, R.N., M.B.A. and James Merlino, M.D.*  
View of Medical Operations – *A. Marc Harrison, M.D., M.B.A.*  
Appreciative Inquiry – *Ronald Fry, Ph.D., M.S.*  
Group reflections  
Business plan refresher  
Business plan group breakout session**May 7<sup>th</sup>**7:30AM-8:00AM  
8:00AM-10:00AM  
10:30AM-11:30AM1:00PM-2:00PM  
2:00PM-3:30PM  
3:30PM-3:45PM  
3:45PM-4:00PM  
4:00PM-4:30PM**Session #8 held at the Foundation House**Continental breakfast  
Be a Great Place to Work and Grow - *Joseph Patrnochak, M.S.*  
The Role of Information Technology at the Clinic - *Daphne Bascom, M.D., Ph.D.*  
Leading Diversity in Health Care – *Le Joyce Naylor, M.A.*  
Marketing at Cleveland Clinic - *Paul Matsen, M.B.A.*  
Group reflections  
Business plan refresher  
Business plan group breakout session**May 21<sup>st</sup>**7:30AM-8:00AM  
8:00AM-12:00PM  
1:00PM-2:00PM**Session #9 held at the Foundation House**Continental breakfast  
Business plan presentations  
Certificates & Awards