



Tuesdays at Ten: Navigating Opportunities & Challenges in IDD/BH

IDD & Behavioral Health

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Meet the Presenters



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Agenda

1. Forces Driving to Re-Think Your Business
2. Strategic Plan
3. Strategic Options for Providers
4. Key Considerations for Decision Making
5. Opportunities for Innovation & Growth
6. Implementation Plan
7. Questions



U.S. Presence

Top 10

U.S. Public
Accounting Firm*

\$2.2bn

Revenue
(FY2024)

76

Markets

29

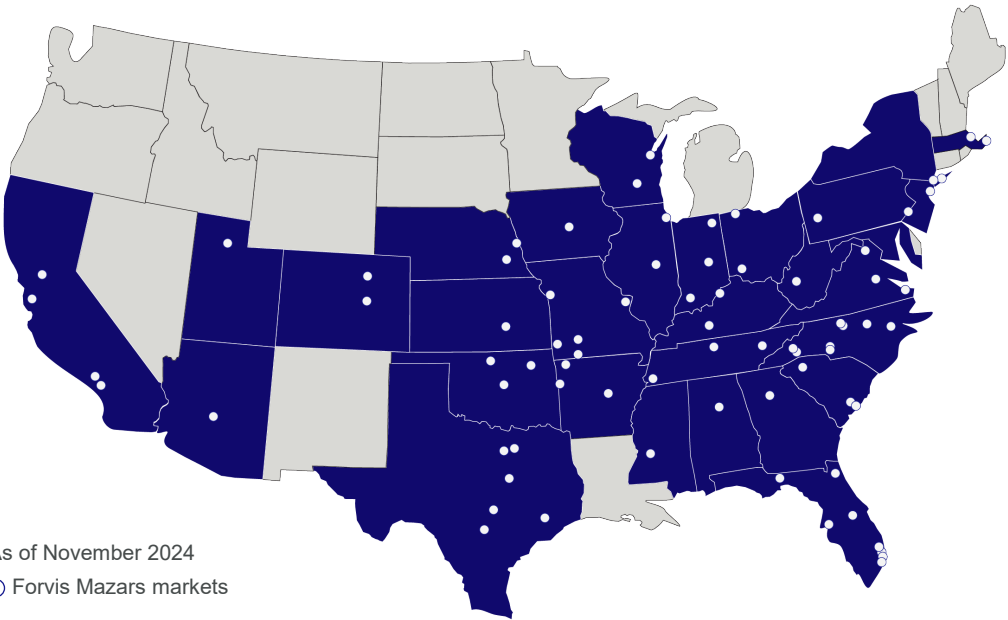
States

600+

Partners &
Principals

7,000+

Employees



Alabama
Birmingham

Arizona
Phoenix

Arkansas
Fort Smith
Little Rock
Rogers

California
Irvine
Los Angeles
Sacramento
San Jose

Colorado
Colorado Springs
Denver

Florida
Boca Raton
Fort Lauderdale
Jacksonville
Miami
Orlando
Tallahassee
Tampa Bay
West Palm Beach

Georgia
Atlanta

Illinois
Chicago
Decatur

Indiana
Evansville
Fort Wayne
Indianapolis

Iowa
Des Moines

Kansas
Wichita

Kentucky
Bowling Green
Louisville

Massachusetts
Boston Brewster
Boston-Chestnut Hill

Mississippi
Jackson

Missouri
Branson
Joplin
Kansas City
Springfield
St. Louis

Nebraska
Lincoln
Omaha

New Jersey
Iselin

New York
Long Island
New York City

North Carolina
Asheville
Charlotte SouthPark
Charlotte Uptown
Greensboro
Greenville
Hendersonville
Raleigh
Winston-Salem

Ohio
Cincinnati
Toledo

Oklahoma
Enid
Oklahoma City
Tulsa

Pennsylvania
Fort Washington
Pittsburgh

South Carolina
Charleston
Greenville
Summerville

Tennessee
Knoxville
Memphis
Nashville

Texas
Austin
Dallas
Fort Worth
Houston
San Antonio
Waco

Utah
Salt Lake City

Virginia
Norfolk
Richmond
Tysons

West Virginia
Charleston

Wisconsin
Appleton
Madison

* Source: Inside Public Accounting, based on most recent rankings
FY2024 combined revenues: FORVIS & Mazars USA
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Forvis Mazars' Healthcare Practice

Achieving Health

#1

Largest tax preparer for healthcare organizations*

#1

Largest cost report preparers for healthcare organizations*

#2

Second largest provider of Single Audits for nonprofit organizations*

#6

Sixth largest healthcare consulting firm*

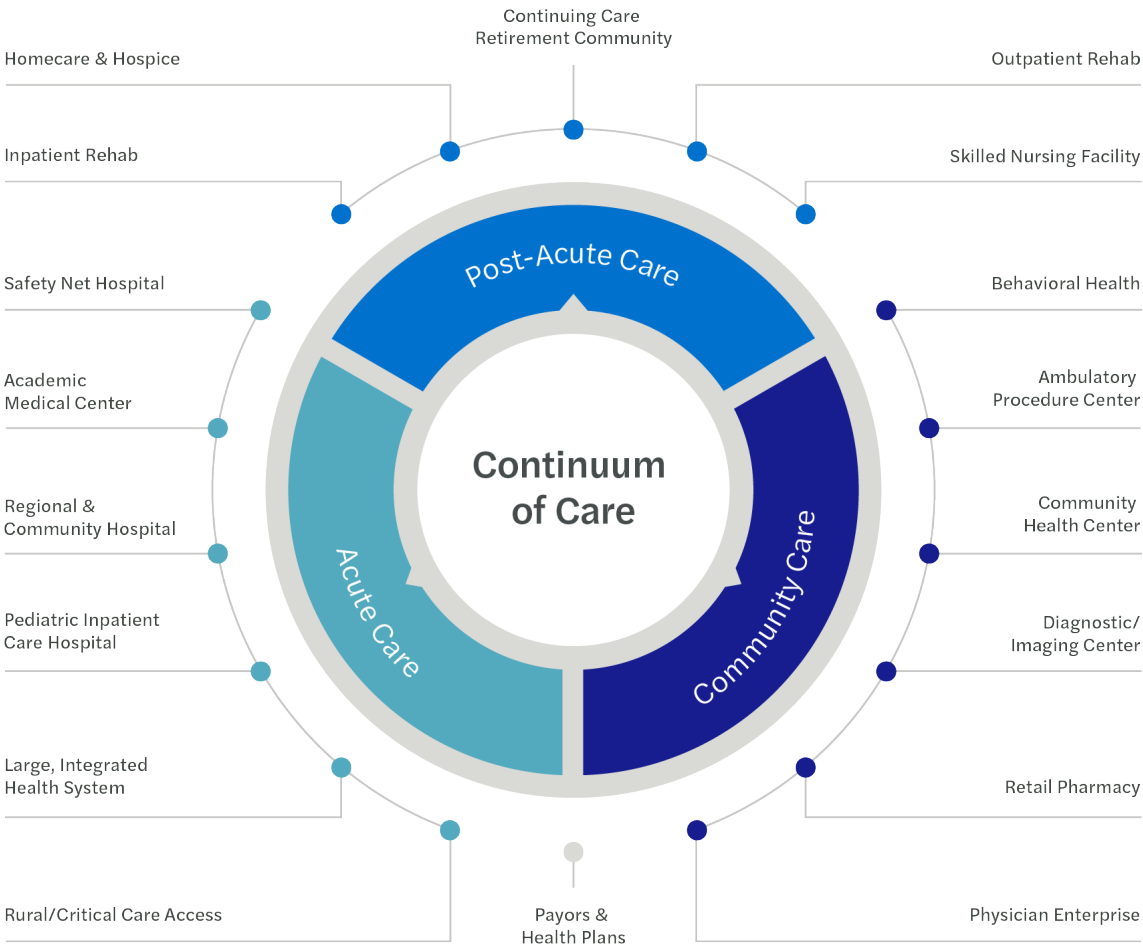
88

Net Promoter Score from healthcare clients*

5,950+

Healthcare organizations served across the U.S.

Forvis Mazars helps healthcare organizations across the entire **continuum of care** in pursuit of **Achieving Health** for their enterprises and those they serve. We provide holistic and tailored **assurance, tax, and consulting** services designed to help you develop and hone the **core capabilities** necessary to navigate the dynamic healthcare landscape and drive **value, quality, and results**.



Sources: UCX survey NPS score; Modern Healthcare's Largest Management Consulting Firms ranking; Health Financial Systems (HFS); and Cause IQ based on Form 990s for non-profit healthcare providers



Forces Driving to Re-Think Your Business

Regulatory shifts

Economic pressures

Service delivery evolution

Workforce challenges

Artificial intelligence

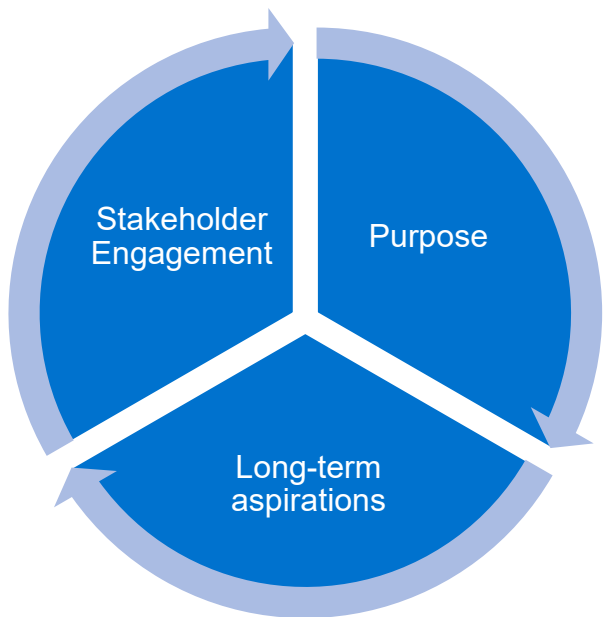


Strategic Plan

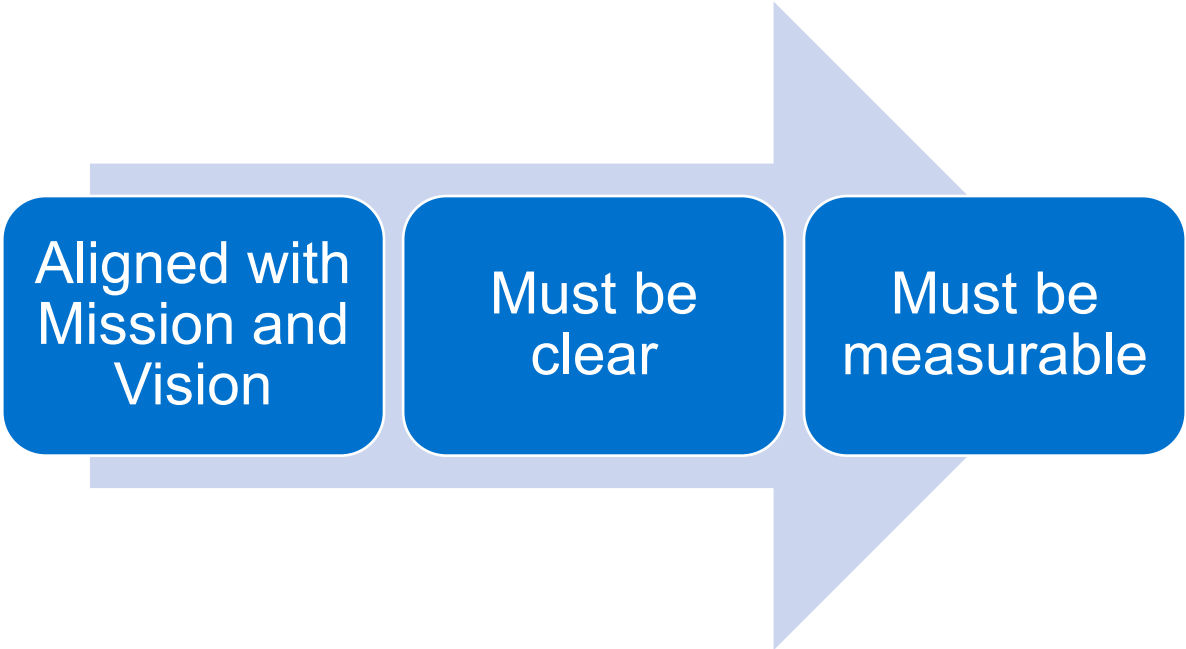


Strategic Plan

Mission & Vision



Goals, Priorities, & Strategies

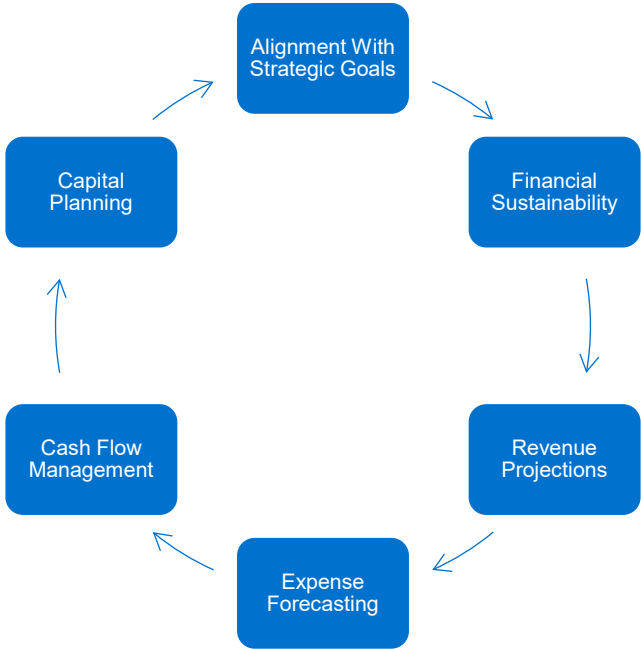


Strategic Plan

Environmental Analysis

Internal Assessment	External Assessment
<ul style="list-style-type: none">• Strengths• Weaknesses• Workforce	<ul style="list-style-type: none">• Political• Economic• Industry• Demographics• Technological• Legal

Financial Plan



Inorganic Growth – Strategic Options for Providers

Mergers

- Horizontal vs. Vertical
- Benefits and risks

Affiliations

- Management agreements
- Shared service models

Partnerships

- Joint ventures
- Community-based collaborations

Key Considerations for Decision Making



Key Considerations for Decision Making

Mission Alignment

Shared
Vision and
Values

Cultural
Compatibility

Strategic Fit

Stakeholder
Engagement

Governance
and
Leadership

Sustainability
and
Innovation

Key Considerations for Decision Making

Financial Due Diligence

Financial
transparency

Financial
statement/cost
report analysis

Review of
accounting
processes

Billing and
reimbursement
practices

Liabilities and
Risks

Key Considerations for Decision Making

Legal and Regulatory Compliance

Legal due diligence

Corporate
governance

Regulatory
approvals

Employment
and labor laws

Data privacy
and protection

Key Considerations for Decision Making

Operational Integration

Clear and
measurable
objectives

Leadership and
governance

Communication
strategy

Workforce
optimization

IT systems and
technology
integration

Revenue cycle
management

Clinical and
operational
processes

Regulatory and
compliance
tasks

Opportunities for Innovation & Growth

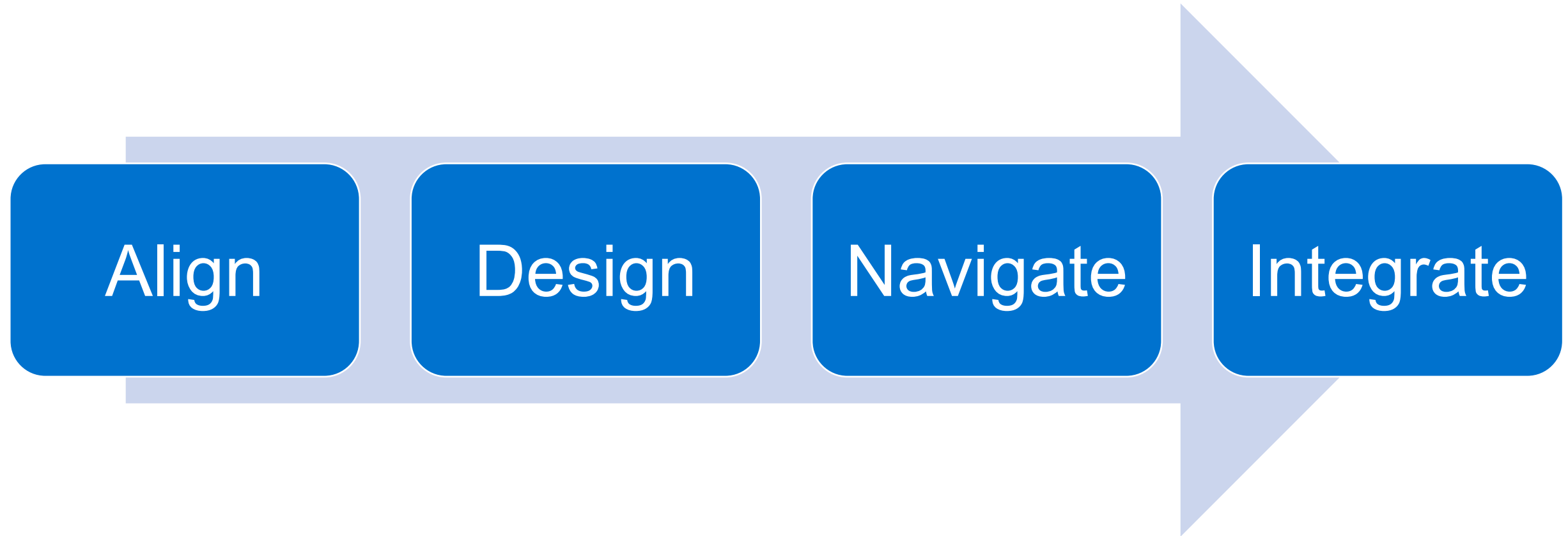
Improving
quality and
outcomes

Expanding
service
reach

Leverage
scale



Implementation Plan



Questions?





Thank you!

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