

Louisiana Chapter HFMA
Strategic Plan and Assessment
2007-2008

Prepared By:

The Strategic Planning Committee

Candi Richard, Chairperson
Michael Mouisset, Co-Chairperson

Committee Members

Roger Mattke
Stacy Calvaruso
Chris McGivaren
Lucius Butts
N. Carol Brown

Executive Summary

This year's leadership of the Louisiana Chapter will continue the long standing tradition of providing its members with top quality educational programs, opportunities to develop and display leadership skills, opportunities to relax, share ideas, and network with peer healthcare professionals. The aim will be to provide such at an undeniable dollar value with an unquestionable return on investment. Chapter performance will once again depend on the hard work of its volunteers, calling for more creativity and innovation. Our desired focus is for the National HFMA organization and the Louisiana Chapter to continue to be the leading professional resources helping HFMA members and others improve the business performance of their organizations operating in or serving the healthcare field.

The focus of all chapter activities and educational programs will be tailored to the needs and requests of our members, as close to the individual level as possible. Chapter leaders will continue to measure all services provided to members of the chapter through feedback at individual chapter meetings and through external surveys to chapter members requesting their opinions and comments on chapter activities and topics of greatest interest. The results of such surveys will be used to establish events / programs to encourage increased attendance, and thus, education hours per member. The intent for this year is to get more members involved by allowing input for speakers and/ or topics at planning sessions to be held at each institute to anticipate the needs of the upcoming seminar. We intend to closely monitor compliance with the new reporting requirements established by National, including the chapter balanced score card and the program planning tool.

I. Chapter Foundation

A. Vision of the Chapter's Future

The Louisiana Chapter of the HFMA will improve the business performance of the State's healthcare organizations by providing excellent educational and personal growth programs for the professional financial management of these organizations, through the use of local and national HFMA talent and resources.

B. The Chapter Mission

The Louisiana Chapter of the Healthcare Financial Management Association is dedicated to advancing the financial management of healthcare by assisting members and others improve the business performance of their organizations operating in or serving the healthcare field, by:

- a. Providing education, information, networking opportunities, and promoting certification and leadership development.
- b. Influencing healthcare financial management and accounting policy decisions, principles and practices through dissemination of information and encouragement of members in their advocacy efforts.
- c. Establishing and promoting the highest standards of professional and ethical conduct.

C. Values of the Chapter

- a. Service to the individual member is the highest priority
- b. Excellence is the standard of our operations
- c. Teamwork is essential to our Chapter activity
- d. Creativity and innovation must be fostered
- e. Individuals are important and should be treated with respect, dignity and fairness
- f. We must act in a financially responsible manner
- g. Leadership must be continuously developed

II. Chapter Assessment

A. External Assessment of Member and Customer Needs

- Members
 1. Current and timely educational programs and topics
 2. Provide appropriate opportunity for educational hours
 3. Networking opportunities for idea sharing
 4. Sense of belonging to the Chapter
 5. Opportunity to develop leadership skills
- Employers
 1. Professional and personal development of employees to improve organizations business performance
 2. Value for their educational dollars; positive ROI
 3. Educational resources for their employers
- Sponsors
 1. Recognition of Chapter participation
 2. Networking opportunities
 3. Return on Investment for sponsorship

B. Social, Political, Technological Environment

- Opportunities
 1. Provide education on market driven healthcare changes and new technologies for members and the general public
 2. Promote cooperative exchange of information between like and diverse healthcare organizations.
 3. Provide education on governmental payer changes
 4. Provide networking opportunities for members and sponsors
 5. Provide a forum for discussion of issues of concern to the healthcare industry
 6. Provide an opportunity for peer assistance in healthcare certification education

- Threats
 1. Reduction in membership and educational funds due to financial cutbacks of employers and facility consolidations along with the remaining impact on the New Orleans area after Hurricane Katrina
 2. Increasing competition from other organizations for educational dollars
 3. Member time restrictions
 4. Meeting educational needs of diverse membership
 5. Sponsor cutbacks limit financial resources

C. Internal Assessment of Chapter Strengths and Weaknesses

- Strengths
 1. Continued sound financial position
 2. Affordable programming with nationally recognized speakers
 3. Relationship with Louisiana Hospital Association
 4. Networking opportunities
 5. Participation of Fiscal Intermediaries
 6. Active participation of past presidents and officers
 7. Participation of sponsors and vendors

- Weaknesses
 1. Member involvement in chapter administration
 2. Low CFO attendance at quarterly meetings
 3. Geographic dispersion of members

III. Chapter Goals and Objectives

A. Goals for service to members

1. Develop programs to encourage member attendance
(Measure: increase in membership attendance)
 - a. Continue to offer programs of interest to various groups (concurrent tracks)
 - b. Continue effort to obtain best possible speakers for topics selected according to members survey responses
 - c. Select optimal meeting locations and times (dates)
 - d. Continue working with governmental payers and Louisiana Hospital Association in joint educational ventures
 - e. Promote meetings through various sources
 - f. Create opportunity for more member involvement by welcoming all to attend a planning meeting for topics/ speakers at each institute for the upcoming institute

2. Develop programs to increase attendance by SFE/CFO's at chapter meetings
(Measure: increase in attendance of SFE/CFO Members)
 - a. Conduct annual survey of SFE/CFO's for their input on programs
 - b. Continue special SFE/CFO educational tracks and Forums
 - c. Offer special registration incentive programs for SFE/CFO's

3. Promote value of HFMA to CEO's/Administrators
(Measure: increase CEO/Administration awareness of employee involvement with the LA Chapter HFMA)
 - a. Send Chapter newsletter to selected CEO's/Administrators
 - b. Send special letters to CEO's/Administrators of members selected for chapter and national awards
 - c. Send thank you letters to CEO's/Administrators of chapter leaders and national awards

4. Provide adequate return on investment for sponsors and vendors
(Measure: increase in gross revenue / income from sponsorships and vendors over previous year)
 - a. Provide name recognition in every chapter newsletters, in the chapter directory and at each quarterly meeting
 - b. Continue special recognition at Annual Institute
 - c. Survey sponsors and vendors for satisfaction of participation
 - d. Provide sponsors and vendors with speaking / presentation opportunities at quarterly chapter meetings

5. Incrementally increase the number of Certified members in the LA Chapter over the previous year
 - a. Promote certification at all Chapter meetings and in the chapter newsletter

- b. Continue to provide certification coaching courses at quarterly meetings and at special workshops if needed
- c. Provide members access to Chapter-purchased National training manuals

B. Goals for Quality of Service

1. Participate in Davis Chapter Management System and meet mandatory requirements
 - a. Participate in National's member satisfaction surveys
 - b. Track and analyze meeting attendance
 - c. Survey sponsors to determine if their expectations are met
2. Submit the LA Chapter HFMA Newsletter via email to members that notify National of their email while continuing to submit hardcopy newsletters to members and LA Chapter Corporate Sponsors that do not have email capabilities and/ or choose not to have electronic communications with the Chapter
3. Evaluate the benefits of converting the current website to National's web service provider and continue to expand content provided on the Chapter website to increase offerings to members
4. Ensure timely submission of all reporting deadlines
5. Monitor to ensure compliance with the newly instituted chapter balanced score card.
6. Complete the program planning tool and update throughout the year to compare actual performance to anticipated performance
7. Meet National's chapter goal for the Excellence in Education Award
8. Prepare Yerger application for 50th Anniversary Gala.
9. Review other chapter projects for possible Yerger applications, particularly the effectiveness of the new planning sessions for speakers and topics to anticipate the upcoming educational institute

C. Goals for Chapter Growth

1. Promote member participation as officers and on committees
 - a. Continue goal of at least 5 members on Type A Committees and at least 3 members on Type B Committees

- b. Provide recognition by tracking of founders points, name recognition, letters to supervisors and gifts to committee chairs
 - c. Provide special recognition at the Annual Institute
 - d. Highlight committee activity in chapter newsletter
 - e. Include committee updates at chapter business meetings
 - f. Increase photo content in the newsletter to draw member interest and excitement about participation in activities
2. Exceed National HFMA's Chapter Goal for Membership Increases and for SFE/CFO membership increases
- a. Continue member-get-a-member campaign and new member breakfast at the Annual Institute
 - b. Follow-up effort on non-renewing members
 - c. Consider a new member mentoring program
 - d. Continue National's and LA. Chapter SFE/CFO initiatives
 - e. Continue the scholarship/coupon program for potential new members to attend a meeting as a guest
 - f. Continue the CFO Forum panel discussion with LHA on critical financial healthcare issues at institutes to shape healthcare policy
3. Increase attendance at quarterly chapter meetings
- a. Promote meetings in Chapter newsletter and website
 - b. Offer concurrent sessions to interest various chapter members
 - c. Promote members as presenters
 - d. Send out timely meeting notices and follow up emails
 - e. Establish program from "most wanted" topics from National and institute surveys
 - f. Establish meeting calendar in advance and notify members by July via National and local website
 - g. Sponsor incoming Program Chairperson for ANI and set goal of obtaining at least two speakers from that meeting
 - h. Review the rotation of meeting locations to assure maximum attendance from members statewide (analysis of member location through National member data reporting)
4. Joint Meetings with other Organizations
- a. Joint meetings with the Louisiana Hospital Association
 - b. Joint meetings with other HFMA Chapters
 - c. Joint meetings with Louisiana CPA Organization
5. Joint meeting with Region 9 HFMA Chapters
- a. Region 9 HFMA meeting to be held in New Orleans, Louisiana, December 2007.