

Louisiana Chapter HFMA
Strategic Plan and Assessment
2009-2010

Prepared By:

The Strategic Planning Committee

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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 share ideas and network with peer healthcare professionals. The objective will be to provide such opportunities at a dollar value that will yield an unquestionable return on investment. Chapter performance will depend on the hard work of its volunteers requiring creativity and innovation. The 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 informal surveys to chapter members through the use of the various chapter committees requesting 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 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. The chapter leadership will closely monitor compliance with the 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 professional growth programs for the 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 to improve the business performance of their organizations operating in or serving the healthcare industry, 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 operations
- c. Teamwork is essential to the Chapter's success
- d. Creativity and innovation must be fostered
- e. Individuals are important and should be treated with respect, dignity and fairness
- f. The Chapter 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 and opportunity for involvement
 5. Opportunity to develop leadership skills

- Employers
 1. Professional and personal development of employees to improve organization's business performance
 2. Provide value for 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; new MAC and RAC
 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 constraints of employers
 2. Increasing competition from other organizations for educational dollars
 3. Member time restrictions
 4. Meeting educational needs of diverse membership
 5. Sponsor financial constraints due to economy

C. Internal Assessment of Chapter Strengths and Weaknesses

- Strengths
 1. Sound financial position
 2. Affordable programming with nationally recognized speakers
 3. Relationship with Louisiana Hospital Association
 4. Networking opportunities
 5. Prior participation of Fiscal Intermediaries
 6. Active participation of past presidents and officers
 7. Participation of sponsors and vendors
- Weaknesses
 1. Provider member involvement in chapter administration
 2. Economic constraints due to recession
 3. Unknown status of MAC at beginning of chapter year
 4. Low CFO attendance at meetings
 5. 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: finance, PFS, Compliance)
 - b. Continue effort to obtain best possible speakers for topics
 - c. Select optimal meeting locations to reach majority of members
 - d. Continue working with governmental payers and Louisiana Hospital Association in joint educational ventures
 - e. Promote meetings through various sources; direct mail brochures, email; chapter website
 - f. Create opportunity for more member involvement by welcoming all to attend board meetings 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 through advance programming committee
 - b. Provide topics to attract SFE/CFO at institutes
 - c. Offer special registration incentive programs for SFE/CFO's
 - 3. 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. Special recognition at Annual Institute
 - c. Survey sponsors and vendors for satisfaction of participation
 - d. Provide sponsors and vendors with speaking / presentation opportunities at chapter institutes
 - 4. 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 summer and annual institutes 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 and place copy on Chapter website
3. Ensure timely submission of all reporting deadlines to meet Davis Chapter Management System requirements
4. Monitor to ensure compliance with the chapter balanced score card
5. Complete the program planning tool and update throughout the year to compare actual performance to anticipated performance
6. Meet National's chapter goal for the Excellence in Education Award – minimum performance of Silver Award
7. Review chapter projects for possible Yerger applications

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
 - a. Continue member-get-a-member campaign and new member breakfast at the Annual Institute
 - b. Follow-up effort on non-renewing members
 - c. Continue offering one free registration for a Chapter institute for all new members
 - d. Continue the scholarship program for potential new members to attend a meeting as a guest

3. Increase attendance at chapter institutes
 - a. Promote meetings in Chapter newsletter and website
 - b. Offer concurrent sessions to interest various chapter members
 - c. Send out timely meeting notices and follow up emails
 - d. Establish program from “most wanted” topics from National and institute surveys
 - e. Establish meeting calendar in advance and notify members by July via National program planning tool participation and chapter website
 - f. 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. Co-Sponsored meetings with the Louisiana Hospital Association
 - b. Co-Sponsored meetings with other organizations with healthcare financial management content
 - c. Promote and sponsor educational events in conjunction with new MAC

5. Joint meeting with Region 9 HFMA Chapters
 - a. Region 9 HFMA meeting to be held in New Orleans, Louisiana, November 2009.

6. Improve Chapter financial performance over prior year
 - a. Actively pursue increase in Chapter sponsors
 - b. Reduce expenses associated with chapter institutes through negotiations with host facilities
 - c. Solicit sponsors for institute socials to decrease cost to the Chapter
 - d. Review and revise as necessary chapter policies on travel and speaker expense reimbursement