# Program Elements Checklist

*Revised January 2019*

The Program Elements Checklist was developed to provide you a roadmap for developing chapter education programs. The Checklist, which is contained on the first two pages, identifies the tasks that need to be performed in planning, implementing and evaluating education programs.

A narrative explanation of each of the checklist items follows the checklist. The narratives are offered to provide further guidance and direction in performing each of the program planning, implementation and evaluation tasks.

If you have questions regarding the program development process or if HFMA may be of assistance to you in program development please contact: Chapter Relations at chapter@hfma.org.

# Program elements checklist

## Design & Develop the Learning Program

- ☐ Assess target audiences' needs; select content/theme/topics
- ☐ Clear learning objectives defined for each session
- ☐ Pre-requisites or pre-work listed
- ☐ Program outline developed
- ☐ Check that session is relevant to overall program goal
- ☐ Speakers review, speaker contract signed, and speaker credentials checked

## Scheduling/Logistics

- ☐ Length of program/sessions provided in agenda; length of day reasonable
- ☐ Adequate time for lunch breaks
- ☐ Networking opportunities provided
- ☐ Select appropriate date; not too near a holiday
- ☐ Set a reasonable program cost
- ☐ Chapter obtained NASBA CPE-Provider status to provide CPE (optional)

## Marketing/Communications

- ☐ Give enough advance notice of program (6-12 weeks) Save the Date etc.
- ☐ Conference/session/presentation title discloses content covered
- ☐ Note prerequisites or preparatory work
- ☐ Session overview provided if multiple sessions during program
- ☐ Cvent for registration process, include registration cost, early bird discount, deadline and refund policy
- ☐ Add Logistical info provided for travel/housing in Cvent
- ☐ Attire noted
- ☐ If CPE is awarded, provide NASBA statement and define amount of CPE (relevant only for NASBA sponsors)
- ☐ Indicate if program is eligible toward maintenance requirement of HFMA certification
- ☐ Be sure chapter web site and National educational calendar are up-to-date

Implement the Program Plan

- ☐ Speaker agreements executed
- ☐ Registration process set up in Cvent
- ☐ Arrangements with meeting site reviewed and confirmed
- ☐ Review speaker presentation and handouts
- ☐ Order food and beverages

Deliver Program

- ☐ Preconference meeting with meeting site staff
- ☐ Onsite registration and information desk available throughout program
- ☐ Check that speakers have everything they need and that their AV works.
- ☐ Monitor participants' experience

Evaluate Program

- ☐ Evaluation of each presenter and learning session in Cvent
- ☐ Program debriefing: lessons learned?
- ☐ Process and procedures improvement
- ☐ Keep planning documents as a guide to the next program, and for Program Chair successors.

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*Assess Participants Needs*

**Target audience defined**

Effective program planning and development begins with knowing the attendees and their learning needs as thoroughly as possible. Knowing the attendees and their needs is essential to properly focusing the program and in designing truly worthwhile programs.

Considerations regarding the attendees:

Attendee Mix:

- Providers? Type and size of facility (e.g. general med surg, 250 bed)
- Non-providers? Organization's business and size (e.g. division of leading national consulting firm specializing in A/R management)
- Daily job responsibilities?
- Experience level?
- Based on their responsibilities and experience, what topics are they most likely to be interested in? What are the key needs related to each topic?

Summary- describe the intended audience in specific job-related terms: who is the meeting intended for? What do they really need to make a difference in the performance of their jobs? How do you know? What will (can) you provide?

*Design and Develop the Learning Program*

**Learner objectives defined for each session**

After developing a clear understanding of the intended audience and their needs and selecting topics based on those needs the next step is to develop objectives for each session. The best objectives address the audience's perceived and felt needs with regards to improved job performance. Hence the importance of understanding the participants' needs.

Objectives are statements attesting to what the program participants will know and be able to do as a direct result of participating in the program. The objectives specify the promised learning, skill development, personal or organizational performance improvements that are attained by program participation.

Clear objectives are the glue that joins the learners, the presenter and presentation activities together in a productive learning experience.

When writing learning objectives (sometimes referred to as outcomes) specify clearly and concretely what participants will be able to do differently as a result of attending the program. Remember to cast what participants will do differently as positive job performance improvements. If appropriate, specify the resources that they will use to improve job performance and the degree to which performance will be improved.

Learning objective templates:

- Participants will be able to (do what?)
- Participants will be able to (do what?) to/by (what degree?)
- Participants will be able to (do what?) to (what degree?) using (what resources?)

Each of the above templates leads to successively more precision in the outcomes of the program. The more precise the objectives the easier it is to focus the program on providing beneficial results.

Examples:

- Participants will be able to reduce total days A/R.
- Participants will be able to reduce total days A/R by 10 percent in the next quarter.
- Participants will be able to reduce total days A/R by 10 percent in the next quarter using the "Sure-Fire" A/R Management Techniques.

## Objectives written with measurable desired outcomes

Strong objectives state program results or outcomes that are easily understandable, obtainable and measurable (i.e., a demonstrable gain of knowledge or skill). The ability to measure results allows program participants to know they have successfully learned the material presented. Measurable outcomes are key to the participants' satisfaction with the program. Satisfied participants are clear on what the success measures are and see the success measures as relevant and attainable.

Weak objectives provide outcome statements that are too general, non-specific, not measurable and/or non-compelling i.e., not relevant to the participants' real needs.

Returning to the sample objectives above:

- Participants will be able to reduce total days A/R.

  Comment: Not a bad start but rather general. Two things are missing. First, the extent to which this outcome can be achieved is not stated and so the significance of the result is unclear. Is the outcome 1 day? 30 days? Some vague number in between? Second, how the outcome is to be achieved needs to be included so that the participants not only know how to achieve the outcome but also believes it is possible for them.

- Participants will be able to produce a plan to reduce total days A/R by 10 percent in the next quarter

Comment: Better. There is more definition of the range or degree of improvement in the outcome. This makes it more compelling. There is still not a specification as to how this outcome can be achieved.

- Participants will be able to produce a plan to reduce total days A/R by 10 percent in the next quarter using the proven "Sure-Fire" A/R Management Techniques.

Comment: All of the elements of a strong objective are present providing for outcomes that are compelling, believable and obtainable. Objectives such as these become the foundation for communicating with faculty about the intention of the program (program content design) and with participants about the value of the program (marketing)

**Don't start publishing the program's learning objectives until you have finalized the sessions with the speakers. Speakers need to have a clear understanding of and commitment to the program's objectives.**

## Pre-requisites or pre-work listed

Prerequisites for participation:

- Job responsibilities- type and level?
- Years and/or type of professional experience?
- Skills?
- Education level? Type of education?
- Affiliations? e.g., HFMA membership

Pre-work:

- Readings? – Hardcopy provided? Web based?
- Exercises? Presubmit? Bring along?
- Case studies: participants to bring data?
- Establish personal learning goals for the course.

## Program outline developed

Attention must be given to the overall flow of the participants' experience in light of the defined objectives. The objectives will determine what content is to be presented and provide suggestion as to how to handle the material. The task at this level is outlining the overall program in terms of the scope of content (what will and will not be covered) and the sequence (the logic behind the overall program presentation).

- Can the objectives be addressed in one session? How long is the session? Are several sessions needed? How long is each of the sessions to be?
- Why is the program structured as it is?
- Does the subject matter flow logically from start to finish?

**Conference/session/presentation title discloses content covered and**

**Session relevant to overall program goal**

Program titles and descriptions are very important in terms of getting people to choose to participate and in setting appropriate expectations among participants. Good titles complement good objectives by presenting a clear and concrete statement of the program's focus. The more the focus is tied to identified job improvement needs the more likely to spark the interest that leads to the choice to attend the program.

The program descriptions describe the results, the benefits that participants will receive by participating in the program and how these results will be achieved in the program.

The program titles and descriptions are the heart of the marketing message.

- Are the program and session titles clearly related to the objectives?
- What expectations are being set by the program titles and descriptions set?

Do the program descriptions use action words to describe what the participants will be doing and to invite interaction in the program?

**Timing the agenda; keep the length reasonable**

A fundamental aspect in planning the flow of the program is to be sensitive to how participants will be spending their time. This demands balancing interrelated factors including the amount of presentation time needed to achieve the promised results, the time participants need to travel to the program, time for breaks and refreshment, and time for participants to informally network with one another to process what they have just learned (a key learning component!).

Busy adults have little patience with learning experiences that do not immediately get to work at providing the promised benefits. There are several general rules of thumb with regards to time allotment for programs:

- Program session should generally last no longer than 90 minutes. Attention may begin to wane past 90 minutes. Allow participants a chance to break and return to the program.
- It is recommended to have breaks throughout the day of between 20 and 30 minutes. These breaks allow people the opportunity to refresh, network with colleagues, discuss with the presenter or check with the office.

- As a rule of thumb, each day of your program should not last longer than the standard business day.

The program can be quickly evaluated with these simple principles:

- Are the starting and ending times convenient and sensitive to participants travel?
- Is time allowed for registration? Is there a staffed registration area?

## Adequate time for lunch breaks

It is recommended to allow at least 60 minutes for lunch. This may be shortened if options such as a luncheon buffet or a boxed lunch are being provided. Luncheons can be worthwhile networking time for participants. Considerations include:

- How much time is allotted to lunch?
- Type of lunch: plated sit-down? Buffet? Box?
- If it is buffet or box lunch, is adequate seating provided?
- Cost of lunch per person? Guarantees?

## Networking opportunities provided

A key benefit for participants of learning programs is the opportunity to develop a network of experienced peers to draw upon. Peer-to-peer interaction is among the most powerful tools for learning critical to job performance. It is recommended that networking be planned into the program.

Networking does not need to be limited luncheons, breaks or receptions. Powerful networking experiences can be planned into the learning sessions through formats such as roundtables, problem-solving exercises, workshops, interactive Q&A sessions, etc.

- What sessions in your program would be enhanced by peer-to-peer interaction?
- What networking opportunities are planned?
- If networking is planned within the learning sessions, how does the networking support achieving the learning objectives?
- Does the networking activity require special room set-up?

## Session overview provided if multiple sessions during program

Sessions descriptions for programs containing multiple learning sessions provide the participants with the opportunity to customize and personalize the program by selecting sessions related to their personal needs and interests. This ability to customize can lead to an increase in satisfaction scores.

- Are programs descriptions provided for each learning session?

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- Are the descriptions clearly related to the learning objectives?
- Are sequential sessions clearly labeled?

## Speaker Selection & Speaker Credentials

The selection of speakers/faculty for the learning session is determined by several important criteria including the chosen session format. The primary criterion for selecting speakers is the ability of the speaker to meet the defined session outcomes. This frequently requires working closely with a speaker to develop a learning session that includes well-planned and focused interactive exercises.

- Does the presenter have the required depth of subject knowledge and breadth of professional skills to help the participants obtain the promised outcomes?
- How will the presenter achieve the selected outcomes? What will be the participants experience in the learning session with the presenter?
- What type of learning session is the presenter expected to lead? A best practices workshop? Case study review and scenario creation? Open-ended "ask the experts" session? Small group problem solving exercises? Does the presenter have the skills needed to present such a session?
- Do vendor speakers understand and respect HFMA's noncommercial guidelines for session content?

## Set Appropriate dates; i.e., not too near holiday

The proximity of holidays can decrease program registration. Programs placed too near to holidays can be perceived as too much time away from the office and/or impinging on peoples' desires to be with friends and relatives. Be sensitive also to vacation times such as summer and the days when children return to school. These too are times when other concerns may compete with planned programs.

- Does the program avoid federal, state and local holidays?
- Are religious holidays avoided as well (check Christian, Jewish, and Muslim calendars)?
- Is the program scheduled at a time to minimize competing concerns such as vacation seasons and children returning to school?

## Registration process clearly defined, including costs, deadline, and refund policy

Registration processes should be easy to understand and easy for interested participants to follow. Registration will generally capture:

- The participants name, job title, employer and employer's city and state
- Participant's contact information: business or home address, email, phone and/or fax

- Program selection: title, date and time
- Registration fee: amount due
  - Include the terms for any special discounts offered
- Payment information: Specification of whom to make checks payable to Specification of type of credit cards accepted (VISA, MasterCard, American Express, Discover), card number, expiration date, cardholder name and signature.
- How are participants to provide the needed information? By mail? Over-the-phone? E-mail? Where is the registration information and fees to be returned?
- Is registration available onsite at the program? Have plans been made to staff an onsite registration?
  - Consider asking participants to reserve a space even if they want to register on site.

Refund policies should be clearly specified.

- Are full refunds available? Under what circumstances?
- What are the policies for cancellations? Substitutions?

## Program cost reasonable

Take into consideration the various costs (especially variable costs) when establishing prices for the program. It is also beneficial to be aware of the prices of similar types of programs (e.g. full one-day professional seminars) available to the potential program participants. This can help in establishing a strong competitive, value driven price.

The various program cost considerations include:

- Travel (and possibly meals and lodging) for individuals staffing the program
- Equipment rentals
- Printing of handouts and other program materials
- Freight
- Postage
- Telephone
- Supplies such as name badges and signage
- Bank fees/credit card processing fees
- Room rental
- Speaker honorarium and travel expenses
- Meal functions

- Marketing expenses such as brochure printing and mailing; list acquisitions, broadcast faxing

**<u>Logistical info provided for travel/housing; dress attire</u>**

Information regarding the location of the program should be included in all marketing and registration materials. The information to be included:

- Name of hotel/conference center, organization or facility hosting the program
- Address and phone number of meeting site
- Information on making overnight accommodations (if applicable) including rates and any availability restrictions or deadlines
- Attire

**<u>Enough advance notice of program allowed for attendee scheduling</u>**

Plan to provide a full description of the program to potential program participants at least 12 weeks out from the date of the program. This allows plenty of time for the participants to make arrangements to attend the program. Additionally, it provides the ability to monitor registrations and leaves enough time for additional marketing, reminders and follow-up in the event that registration is slow.

Monitoring registration also allows for the opportunities to monitor room block pick-up and food and food and beverage guarantees and to make adjustments. The number of participants expected determines the room set-up for the learning sessions and directly affects the presentation methods. It is recommended that program planners develop target minimum and maximum number of attendees for sessions. This will assist in specifying room sets, determining if the space is adequate for the planned learning activites and whether or not a session needs to be closed to further registrations (in which case, a waiting list may be developed).

**<u>If CPE is awarded, NASBA statement is listed and amount of CPE defined (relevant only for NASBA sponsors)</u>**

NASBA has requirements for NASBA registered CPE providers regarding information that must be made available to participants as well as evaluation and records retention processes that must be followed. It is recommended that requirements be included as action items for program providers

**<u>Statement indicating if program is eligible toward maintenance requirement of certification</u>**

All education programs are eligible for meeting the HFMA certification maintenance requirements. A statement indicating this can be included in the marketing and program materials as another value to highlight

*Implement the Program Planning*

**Speaker agreements executed**

The ability to achieve the selected program outcomes is the primary criteria by which to select a presenter. The program outcomes and the methods to achieve the outcomes should be discussed with the potential speaker. In the context of that discussion, the speaker can develop focus, structure an appropriate session format and select the appropriate content.

Once these have been agreed upon, each party's obligations with regards to the program can be discussed. A speaker's kit may be provided to the presenter. The kit can include items such as a welcome letter, samples of program marketing pieces to illustrate marketing approaches, A-V request forms, reimbursement guidelines, hotel information (if appropriate) and a speaker agreement.

The speaker agreement should specify the following:

- The engagement, i.e., the name of the program (or session), date, time and location of the program for which the presenter's services are required.
- Description of the session, including the type of presentation, audience interaction.
- The obligations of the presenter, e.g., provide a session description for the marketing materials by a given date; develop and provide handout materials by a given date; return AV requirements by a given date; present the program on a given date according to agreed upon conditions (format, length), etc.
- The obligations of the chapter, e.g., arrange for adequate meeting space; provide requested AV; provide handout reproductions, etc.
- Compensation and/or reimbursement, e.g., honorarium, hotel, airfare, ground transportation, meals, and any program development costs incurred.
- Originality of the presentation, i.e., an affirmation that the presentation is the work of the presenter and that appropriate permissions have been obtained by the speaker to use any materials that are copyrighted by others.
- Ownership of copyright, e.g., the speaker retains copyrights in the presentation but will provide the chapter a non-exclusive license to reproduce and use the materials.
- Permission to audiotape or videotape if applicable, agreed-upon uses, and ownership of the recording.
- The independence of the contracting parties, i.e., that the engagement does not constitute employment.
- Conditions under which either party may terminate the agreement

- Indemnification of the chapter by the speaker against any legal claims made as a result of the speaker's presentation

**Registrations processed**

Accurate and timely registration processing allows for the monitoring of key aspects of the program's success:

- Actual revenue to budgeted revenue
- Numbers for use in learning program room sets, printing of handout materials, food & beverage guarantees and for room block pick-up (if appropriate). The registration numbers provide the key driver for projecting program costs.

Accurate registration processing includes providing confirmation to the attendees the program and sessions that they have registered for and that payment has been received. The registration information can be used to create name badges and provide attendee lists to participants. This is automated and managed in Cvent.

**Registration Desk Preparation**

Planning for the registration area includes:

- Who will staff the area, and for which hours? When and how will they get necessary orientation and training?
- Will there be cash transactions, and how will they be handled
- What information will be available at the registration desk?
- How will on-site registrations and name tags be handled?

**Arrangements with meeting site reviewed and confirmed**

**Preconference meeting with meeting site staff**

Prior to arrival onsite the contracted arrangements should be reviewed. It is important to note the dates by which guarantees must be provided and what information is needed. If these dates are not met, the chapter will likely be liable for additional costs. It is recommended that a meeting with the meeting site staff be held prior to the meeting to review the arrangements and make needed amendments.

Every meeting site has different emergency protocols and emergency contact information. Be sure to go over this information during the meeting with the on-site staff and distribute emergency contact information to your meeting volunteers.

***Deliver the Program***

**<u>Onsite registration and information desk available throughout program</u>**

Hospitality is fundamental to a successful program. Participants should be able to find information regarding the program and the schedule quickly and easily.

**<u>Speaker readiness and support</u>**

Hospitality includes ensuring the presenters have everything they need. Presenters should be greeted, thanked for their participation and have any questions addressed immediately. It is important to confirm with the presenter the presentation topic, schedule, room location and equipment needs. Note that presenters frequently need assistance with AV set-up.

**<u>Monitor participants' experience</u>**

Be present to the participants throughout the program. Sit in the presentations as much as possible. Share in the breaks and meals. Invite ongoing feedback from participants. Frequently, issues can be addressed quickly and simply before they grow into dissatisfactions with the entire program.

***<u>Evaluate the Program</u>***

Evaluation is fundamental to the development of successful education programming. The critical element to assess is whether the learning objectives were met. Was the promised value actually provided?

Key considerations include:

- How, when, and where will evaluation forms be distributed?
- Should a reminder about the evaluations be included in the housekeeping comments before and after the program?
- How will complete evaluations be gathered and delivered to the program committee?

**<u>Evaluation of each presenter and learning session learning session</u>**

Each presenter should be evaluated regarding presentation style (clarity, interaction, use of AV) and content (relevance to learning objectives, appropriate level of depth, practical applications). Responses to the evaluations should also be shared with presenters. This helps reinforce the role of the planning committee. It is also useful to ask an open-ended question about what the participant liked best about the program and about what could be done differently next time to improve the experience.

## Program debriefing: lessons learned?

Be sure to schedule time with the entire planning committee to review all of the evaluations as well as to share personal experiences of the program designing, development and implementation. The focus should be on identifying what went well and can be maintained and what can be improved in the future.

## Process and procedures improvement

Process and procedure improvements are best documented and archived for future use in planning. Don't forget the important step of documenting recommendations for improvements. Good ideas are often lost without the documentation.

Documentation of your program plan is also important for future reference and to provide a guide for your program chair successor.