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2025 Success Award Winning Submissions

ENGAGEMENT CATEGORY

Chapter Name: Arizona

Submission Type: Chapter

Award Title: Train the Trainer Program to Enhance Engagement and Increase HFMA Certifications

Submission Summary: The Arizona HFMA Chapter is submitting our success award for our engagement initiative to establish a train the trainer program for certification bootcamps. As demonstrated by our application, we have surpassed our stated goal and increased our total certifications by 28%.

Needs Identification:

Arizona HFMA identified an opportunity to enhance member engagement by empowering our hospitals and healthcare systems to host their own certification bootcamps, leading to increased participation and certification rates. We solicited feedback from the Arizona Chapter hospitals and healthcare systems which resulted in the creation of a train the trainer committee. This committee was represented by six of the state's largest hospitals and healthcare systems and included both enterprise organizations and professional membership organizations. These members represented over 94% of the chapter membership which has over 3,000 members. The feedback was unanimous, if the hospitals and healthcare systems hosted their own bootcamps, engagement and certifications would increase. Each hospital and healthcare system would be able to determine the best time of year and the best way to divide the bootcamp content. Ultimately, this should result in new HFMA members and more certifications which improves engagement.

At the beginning of our chapter year, we had 554 certifications within our chapter membership. Our goal was to increase this by 25% so we would need a total of 693 certifications by the end of February 2025.

This goal aids in improved engagement with HFMA and ensures all hospitals and healthcare systems witness the value of HFMA membership.

Goals and Objectives:

The train the trainer committee determined that the best way to achieve additional engagement in this initiative was to set up a meeting with the Arizona hospitals and healthcare systems. At this meeting, we would distribute materials that would aid in certification bootcamp facilitation.

Our goal was to create a sustainable certification initiative that 1would empower hospitals and healthcare systems to independently facilitate bootcamps. To achieve this, we collaborated with HFMA's Certification Operations Manager to develop a comprehensive resource package.

We were provided with the following documents:

- HFMA Coaching Slides
- HFMA Key Concepts Guide
- HFMA Coaching Course Resources
- HFMA Coaching Course Facilitator Guide

In addition to these documents, we developed a frequently asked questions document and a train the trainer getting started document. These were developed based on the feedback we received after a bootcamp that was conducted at one of our hospital sites.

Our train the trainer initiative would be challenging because we had to gather all of the documents, develop new documents, and ensure the hospitals and healthcare systems would attend the meeting. We also needed everyone to buy into the task of preparing for and then scheduling the training for their staff. If we were successful then the value to their organizations would be achieved as their staff would be HFMA certified members.

The milestones were broken into quarters:

Q1 (June – August): Build committee, initiate strategic plan, schedule the hospitals and healthcare systems meeting, multi-region (Region 8 and 10) virtual CRCR bootcamp.

Q2 (September – November): Virtual CRCR Bootcamp (Region 10 and 11), annual certification challenge period.

Q3 (December – February): Western Region Symposium Bootcamp (CRCR), annual certification challenge period, hospitals and healthcare systems evaluation survey.

Q4 (March – May): Report successes by March 1, 2025.

Methodology:

In August 2024, we met with 16 people that was comprised of eight hospitals and healthcare systems in Arizona. This participation represents over 94% of the chapter membership which has over 3,000 members. The attendees were provided with the HFMA Coaching Slides, HFMA Key Concepts Guide, HFMA Coaching Course Resources, HFMA Coaching Course Facilitator guide, Frequently Asked Questions document, and a Train the Trainer Getting Started document. Please see attachment 1.0. Our average 'new certifications' in the first seven months of the review period was 15.1 and our average 'new certifications' in the second seven months of the review period was 22.00. We increased our new certifications on average by 6.9 after the program was initiated. Please see attachment 2.0 Tab 1.

To continue our focus on earning certifications, we also rolled out two new HFMA certification awards that were presented to recipients at our fall conference. The first one is the Saguaro Award for those who obtained their fellowship (FHFMA) or executive (EHRC). We had three recipients for this award. The second one is the Phoenix Award for individuals who have earned three or more HFMA certifications. We had five recipients for this award. Please see attachment 3.0.

In addition to our fiscal year 2025 train the trainer program, we continued engagement efforts that started in fiscal year 2024. These activities include our certification challenge for the organization that had the largest improvement in the year. The winner of the certification challenge will receive a trophy and will be honored at our award ceremony. We also continued to validate our member rosters for accuracy. And finally, we continued highlighting members who earned certifications in our Sonoran Scoop Newsletter. Please see attachment 4.0.

In July 2024, we hosted a virtual CRCR bootcamp with the Iowa region. This bootcamp was offered to all members of regions 8 and 10 and resulted in a recorded version of the bootcamp that was published on the HFMA Association YouTube channel. This gave our providers visibility into recorded bootcamp material so they could use it as a guide when hosting their own bootcamps.

In February 2025, we sent out an evaluation survey in order to gain feedback from our hospitals and healthcare systems on the effectiveness of the train the trainer program. We had four people that represented three hospitals and healthcare systems complete the survey. Many respondents commented that the material prepared for the attendees was great. Please see attachment 5.0.

Evaluation and Results:

Based on the Arizona Chapter efforts in FY2025, we increased our certifications by 28% and therefore exceeded our stated goal. At the beginning of the fiscal year, our certifications were at 554 and as of the date of the award submission we have 720, this equates to a phenomenal increase of 158 certifications this year. Our program's success was evident in both overall certification growth and specific certification categories. Most notably, our Certified Specialist Physician Practice Management (CSPPM) that increased by 80% and our Certified Specialist Business Intelligence (CSBI) that increased by 45%, demonstrating broad engagement across HFMA's offerings. Please see attachment 2.0 Tab 2. By meeting our stated goal, we have improved engagement with HFMA and have aided our hospitals and healthcare systems in witnessing the value of HFMA membership.

The Arizona Chapter is proud to have exceeded our engagement goals, directly increasing certifications and fostering deeper HFMA involvement across the state. We appreciate your consideration and remain committed to expanding the value of HFMA membership.

Chapter Name: First Illinois

Submission Type: Chapter

Award Title: Bringing Diversity, Equity and Inclusion Awareness and Engagement to First Illinois HFMA

Submission Summary: Continue to establish a diversity, equity and inclusion committee, where we are seeking to prioritize education, literacy, conversations and action on topics related to DEI. We believe that all members should have equitable access to the Association's resources and create a welcoming environment.

Needs Identification:

The First Illinois HFMA chapter established a diversity, equity and inclusion (DEI) committee. Our new committee formed from a group of passionate volunteers who created an official charter to address our mission, goals, responsibilities, membership and commitment.

As the professional association for healthcare finance leaders in our area, we seek to prioritize education, literacy, conversations and action on topics related to DEI. We believe that all members, regardless of background and identity, should have equitable access to the Association's resources. We will achieve this by creating a welcoming and inclusive environment for all members.

Goals and Objectives:

Our new DEI chapter created a charter with the goals of:

- Promoting diversity, equity and inclusion among FI HFMA membership through a variety of activities.
- Creating spaces that foster respectful, inclusive and equitable communication and events.
- Suggesting tools and resources to promote continuous learning and engagement around DEI topics.

Additionally, we hoped our events would allow us to reach more diverse audiences and introduce additional organizations to our First Illinois HFMA chapter.

Methodology:

Committee members brainstormed and queried our colleagues about what types of events might be interesting to chapter members to ensure a variety of topics, settings, and speakers were engaged for member events. The themes we selected were connected to healthcare in diverse ways.

Our committee hosted one book club this past year:

-We are also transiting the 2025 book club to a podcast discussion, "Unbound Perspectives", which we hope will provide further engagement from our members for those who do not have the time commitment for a full book. This will be held on 4/23/25, with the first podcast discussing the current landscape of DEI and how organizations are pursuing DEI initiatives in today's environment.

Our committee hosted one volunteer event in the community this past year:

-On Saturday, 9/28/24, our committee volunteered at The Boulevard. The Boulevard founders witnessed thousands of people with medical injuries entering shelters across Chicago with nowhere else to go. The Boulevard was founded in 1994 as a medical respite care facility in Illinois serving men and women experiencing homelessness with a full range of resources for holistic human healing. Together, our team completed a landscaping event, readying the property for the fall. We also helped set up their new store where residents can purchase goods.

Our committee hosted one educational event in collaboration with other organizations:

-On 1/25/24, our committee co-sponsored an in-person evening event with National Association of Latino Healthcare Executives (NALHE) and Sinai Chicago. NALHE is a national organization led by Latina/Latino executive leaders of U.S. hospitals and healthcare organizations and experts in the fields of health care policy and practice. Christina Martinez, NALHE President, helped kick off our event, with an introduction and overview of the NALHE organization. Ashley Teeters then gave an overview of First Illinois HFMA. Dimas Ortega then introduced our keynote speaker, Dr. Ngozi Ezike, with a Q & A moderated by Dimas Ortega and Christna Martinez. Dr. Ezike is the immediate past Director of the Illinois Department of Public Health (IDPH), where she valiantly navigated the state through the most difficult waves of the COVID-19 pandemic. Dr. Ezike is an advocate for the Hispanic Population and the first black woman to lead Sinai Chicago in the system's 103-year history. Our discussion focused on how we find, support and grow our minority leadership within our organizations.

Our committee hosts an annual Women-in-Leadership Retreat.

-The WIL retreat was created from an idea that perhaps our women members were hoping to connect more than just on a golf course at our annual golfing event. Our women leaders wanted a way to connect on deeper topics and use the day as a way to reflect, network and learn. Since the inception of this annual retreat, it has grown every year.

-Our chapter has had a strong Women-in-Leadership (WIL) sub-committee that now rolls under our larger DEI committee. The WIL team has been hosting an annual retreat and the 10th annual event on 6/13/24 was a sold-out event with a waiting list.

-Our event on 6/13/24 had sessions that focused on topics around neurodiversity, the glass ceiling, the glass cliff and the intersection of sports and leadership for girls. We have an Amazon best-selling author who will be autographing a copy of her book for all attendees, our HFMA National President, a neurospicy inclusion coach, two c-suite leaders and a PhD from a local university as our speakers

-As part of the 2023 event, we invited NewMoms (https://newmoms.org/) to join us onsite. The organization provides services that support mothers and their children in key areas of life: family support, job training, and housing with programs designed to surround families with everything they need in order to transform their lives. Our WIL retreat was their largest single day of donations ever received.

-Because the event continued to sell out at 75-attendee max at our prior venue, we booked the 10th annual (diamond) event on 6/13/24 at a larger venue at the beautiful Cantigny Gardens where we hope to double our registration for the event at 150 attendees. We have secured our location and finalized all speakers for this event, which will include. We have vendors reaching out to us requesting to be sponsors because it is such a successful event.

-For our 2024 event, we held raffle baskets ticket sales. All proceeds of the raffle basket tickets were split evenly between Girls in the Game and the HFMA First Illinois Scholarship fund. For 29 years Girls in the Game has worked across Chicago and beyond to help over 60,000 girls grow into strong and healthy leaders, giving young women the tools and confidence they need to achieve any goal they set for themselves. Through sports, health and leadership programs, Girls in the Game instills the confidence, motivation and belief that no goal they set for themselves is too high. https://www.girlsinthegame.org/. A total of $3,340 was raised, with Girls in the Game and the scholarship fund each receiving $1,670.

Spring 2025 LGBTQIA+ Event Planning Underway Now

-In November, our committee members were polled on some topics specific to LGBTQIA+. From that discussion, we realized then that we had a real opportunity to bring some awareness and education to our HFMA membership.

-Our committee is in the process of organizing a spring event where we will have Center on Halsted (https://www.centeronhalsted.org/cohoverview.html_ host an educational event for our members. Center on Halsted is the Midwest's most comprehensive community center dedicated to advancing community and securing the health and well-being of the Lesbian, Gay, Bisexual, Transgender and Queer (LGBTQ) people of Chicagoland. We plan on hosting this event in May 2025.

Evaluation and Results:

One of our goals was to promote diversity, equity and inclusion among our First Illinois HFMA membership through our committee activities.

-We hosted eight events since July 2023 (3 book clubs, 2 volunteer events, 2 collaborations with other organizations and 1 annual WIL retreat) with an additional event in the planning phases now (spring LGBTQIA and podcast discussion). All events consistently promoted DEI topics for not only our membership within First Illinois HFMA, but for members of our broader healthcare community.

-We also continuously review our educational events to ensure our members are satisfied. We have found the annual Women in Leadership event to be a very positive event due to survey feedback and evidenced through sponsorship.

oThe 2024 Women in Leadership event was fully sponsored by a business partner, donating $15,000 to cover the event. The same business partner has committed $20,000 for June 2025. The sponsorship helped to generate positive net income in 2024, with net income of $9,511.55.

oDue to the financial success this event continues to have, the chapter restricted $10,000 to be used for future DEI purposes. To date no funds have been used but the chapter and DEI committee continue to brainstorm uses. One possibility is to sponsor registration fees for safety net hospitals members to promote the inclusivity of events, whose attendance can be limited due to tight budgets at these organizations.

oWe continue to see positive scores from our Women in Leadership event, with overall ratings coming in a 4.73, 4.91 and 4.91 for 2024, 2023, and 2022, respectively.

Another one of our goals was to create spaces that foster respectful, inclusive and equitable communication and events.

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-While we believe all of our events achieved this goal, we would like to call out our book club conversations. The books clubs allow membership an opportunity to talk in a safe space around topics that were difficult. The topics were impactful to healthcare, but more importantly relevant topics affecting our communities. One of our book clubs allowed participants to discuss why marginalized groups were more impacted by COVID-19 and what systemic issues led up to those events. Another of our book clubs explored migration and immigration, and what the impact has been for our Hispanic communities. Our most recent book club gave us an opportunity to discuss how the idea of race has been engrained into the very fabric of our country. We are not often able to have some of these tough discussions at other First Illinois HFMA events, so being able to be vulnerable and open with each other discussing these topics was a very positive experience.

We had a goal of suggesting tools and resources to promote continuous learning and engagement around DEI topics.

-There is a lot happening in healthcare specific to LGBTQIA+. Very relevant current examples include gender affirming procedures and gender X as an option on driver's licenses. We did not feel like our First Illinois HFMA had offered an educational forum for our members focused on LGBTQIA+ topics. We are now solidifying details for our Sprint event in collaboration with Center on Halsted to bring education to our membership.

-It is rare that women leaders have an opportunity to discuss topics that are specific to them at work. It is also rare to have a day of reflection, education and networking just for women leaders. Our annual Women-in-Leadership (WIL) retreat allows our membership to engage and learn together, in a safe space for having conversations meaningful to women. Our event has resonated with so many, as evidenced by the fact that our event is now selling out.

-We plan to continue providing education on this important topic despite the changes in the political climate surrounding DEI initiatives.

Additionally, we hoped our events would allow us to reach audiences that are more diverse and introduce additional organizations to our First Illinois HFMA chapter.

-Our upcoming spring event coming up focused on LGBTQIA+ will allow us an opportunity to partner with Center on Halsted. They are a lesbian, gay, bisexual, and transgender community center in Chicago and dedicated to advancing community and securing the health and well-being of the Lesbian, Gay, Bisexual, Transgender and Queer (LGBTQ) people of Chicagoland. The event will be First Illinois HFMA DEI committee's first collaboration with an LGBTQIA+ organization.

Chapter Name: Iowa & Nebraska

Submission Type: Multi-Chapter

Award Title: Survive. Thrive. Lead: Region 8 Women's Leadership Conference

Submission Summary: The IA and NE chapters individually have long-standing histories of supporting women in healthcare finance through innovative, engaging women's conferences. They proved the power of women in numbers when they co-hosted a conference that led to greater engagement with providers and business partners.

Needs Identification:

Both the Iowa and Nebraska chapters have held successful women's conferences for several years; however, at LTC in 2023, Jaiden Ellenwood (current Iowa President) and Taylor Holtmeier (current Iowa director) were busy brainstorming ways to make the women's conference bigger and better. The big idea? A multi-chapter Region 8 women's conference. Region 8 chapters have traditionally only held one event together annually (The Mid-America Summer Institute), so Jaiden and Taylor ambitiously spent LTC trying to convince all seven Region 8 chapters to join Iowa in collaborating on an event. In the end, Iowa and Nebraska collaborated on the first Region 8 multi-chapter women's conference (plus a friend from the Sunflower chapter!)

Particularly post-Covid, Iowa and Nebraska have faced some of the same struggles plaguing in-person meetings, including decreased overall attendance, decreased provider attendance, and difficulty maintaining and/or increasing chapter sponsorship revenue. While both chapters' women's conferences have been very popular in the past, like regular meetings, they too have seen dwindling registration and sponsorship. Iowa and Nebraska leadership realized that by combining forces, there would be more opportunities to appeal to members in order to increase attendance, and to business partners to increase sponsorship.

Goals and Objectives:

Members of the Women's Conference committee from both Iowa and Nebraska identified the following goals we hoped to achieve:

Goal #1: Increase Overall Attendance

Increase collaboration between neighboring Iowa and Nebraska chapters by co-hosting a conference and planning the event together, with the goal being more attendees than each chapter has previously had at their respective women's conferences. Our goal was to increase overall attendance by 15% and have at least 100 attendees at the event (see Attachment #1 for attendance data).

Goal #2: Increase Provider Attendance

Increase provider engagement through pricing strategies to entice more providers to attend. Our goal was to attain provider attendance of at least 50% (Iowa - previous average 39% of total attendance at regular meetings and 68% at women's conferences, Nebraska - previous average 51% of total attendance at regular meetings and 61% at women's conferences) (see Attachment #1 for attendance data and pricing strategy).

Goal #3: Increase Business Partner Engagement and Sponsorship Revenue

Increase engagement with sponsors through sponsorship opportunities offered. Our goal was to raise at least $10K in sponsorship revenue and increase sponsorship revenue by 10% from each individual chapters' sponsorship revenue at last women's conference (see Attachment #2 for sponsorship data).

Goal #4: Engagement with Charitable Organizations

Increase engagement with charitable organizations in the region by supporting a conference charity sponsor. Our goal was to raise at least $1,000 for our charity partner.

Goal #5: Highly Satisfied Conference Attendees

Attain an average satisfaction score of 4 or higher (on a scale of 1 being least satisfied and 5 being most satisfied) in all survey responses from post-conference survey (see Attachment #5 for survey results and Attachment #6 Page 1 for testimonials).

Methodology:

The Women's Conference committee utilized several overall strategies to achieve our objectives identified above, including the following:

1. Jaiden Ellenwood and Taylor Holtmeier acted as the co-chairs for the event and put together a planning committee made up of Iowa and Nebraska volunteer leaders in order to expand collaboration between the two chapters. Integration between Iowa and Nebraska was established through:

a.Cohesive communications being advertised to Iowa and Nebraska HFMA members via LinkedIn through coordination between both chapters' communication committees (See Attachment #3 for LinkedIn social media impact and Attachment #4 for sample communications shared on LinkedIn).

b. Having both a Nebraska and Iowa sponsorship contact (Jaiden Ellenwood – Iowa, Sheila Augustine – Nebraska)

2. Conference pricing strategy – see Attachment #1 for pricing information.

a.Cheaper rates for providers versus business partners.

b.Early bird pricing.

c.Business partners purchasing tables for providers (at business partner rates).

3. Multiple levels of sponsorship available to allow for more or less interaction with planning committee – see Attachment #2 for sponsorship offerings.

a. Networking event sponsors – working with them to pick games and catering menu for event.

b. Event sponsor – working with sponsor to sync marketing efforts and select charity partner.

4. Supporting charity partner for the conference – Girls Inc.

a. Selected charity partner that is a client of our Event Sponsor (Eide Bailly)

b.Promote Girls Inc. and their mission on the conference event website – see Attachment #6 Page 3-7 for Charity tab of event website.

c.Raise funds for Girls Inc. during games played at the conference and by providing QR codes.

d.Employee from Girls Inc. will speak at event to explain their mission.

Additionally, the Women's Conference committee used a variety of tools utilized by HFMA, as well as various technology, to evaluate our progress on the goals identified above.

Goal #1 and #2: Overall Attendance and Provider Attendance

With a goal to increase overall attendance from each of Iowa and Nebraska's last women's conferences by 15% and to have a provider attendance rate of at least 50%, the committee utilized Cvent registration lists, detailing breakout of registrants by provider vs. business partner for combined event and compared to registration lists for each chapter from most recent women's conferences, as well as regular chapter meetings.

Goal #3: Sponsorship Revenue

In order to track and evaluate total sponsorship for this women's conference and past Iowa and Nebraska conferences, the committee utilized QuickBooks revenue reports.

Goal #4: Charitable Contributions

The committee set up a specific PayPal account to track credit card donations in real time the day of the event.

Goal #5: Satisfaction Scores

The committee used Survey Monkey to setup a post-event survey that was sent to all attendees.

Evaluation and Results:

Goal #1: Overall Attendance

Our Women's Conference committee is proud to say that we far surpassed our goal of 100 attendees and 15% growth in attendance. As shown on Attachment #1, there were a total of 143 registrants at the combined women's conference. This is an increase in registrants from Iowa's most recent women's conference of 75 individuals and 110% growth and an increase in registrants from Nebraska's most recent women's conference of 91 individuals and 175% growth. Even more exciting, is that the event registration went live on March 19, 2024, and was sold out by July 17, 2024, 4 months before the conference! We even reached out to the event center to increase capacity to allow for more registrants. One of our committees' concerns while planning the event was deciding on a location that would be easily accessible for both Iowa and Nebraska attendees, and Omaha proved to be the perfect choice as we had great representation from both states.

Goal #2: Provider Attendance

One of the underlying motivators in holding the Women's Conference was to increase provider attendance at HFMA meetings, which has been slowly dwindling post-Covid, as shown on the "Past Meeting History" tab of Attachment #1. For Iowa specifically, provider participation decreased 10% from the 2023 Winter meeting to the 2024 Spring meeting, with an average provider ratio of 39%, compared to 43% pre-Covid. For Nebraska, provider participation actually increased 22% from the 2023 Spring Meeting to the 2024 Winter meeting. However, overall, their average provider ratio post-Covid was 51%, compared to 55% pre-Covid. The committee's goal was to have at least 50% provider attendance at the Women's Conference, which was surpassed at 57%. While this is less than both Iowa and Nebraska's provider ratio at their most recent women's conferences, this percentage still exceeds both Iowa and Nebraska's quarterly meeting provider ratios post-Covid.

One of the main drivers of provider attendance was Knowtion Health sponsoring two eight-person tables for Bryan Health and UnityPoint Health and one four-person table for Nebraska Medicine. This was not initially offered as a sponsorship option and was suggested by Knowtion Health. The Iowa Chapter has now incorporated this into their sponsorship campaign. The committee also believes the pricing structure of the event led to high provider attendance (see "2024 Meeting" tab of Attachment #1). At Iowa's most recent women's conference the rate was $100 for individuals, $300 for tables of four, and $560 for tables of eight and at Nebraska's was $99 per attendee. The lowest possible cost per person option for providers was $45 at a table of eight, $50 at a table of four, or $60 for a single registrant.

Goal #3: Sponsorship Revenue

Sponsorship revenue of $10,000 and 10% higher than the individual chapters is another goal that our committee far exceeded! Per Attachment #2 Page 1, total sponsorship revenue for the event was $19,500. This was a $12,750 or 189% increase from Iowa's 2023 conference and a $14,300 or 275% increase from their 2022 conference. The Nebraska chapter has not traditionally focused on sponsorship for their women's conference, which raised $1,000 in 2022. The structure of the sponsorship campaign allowed for a lot of interaction between the committee and the sponsors. Per the sponsorship benefits outlined on Attachment #2 Pages 2-3, the conference Diamond sponsor, Eide Bailly, worked directly with the committee to host a social media contest, facilitate conference games, introduce the keynote speaker, and pick the conference charity. Additionally, the committee had several meetings with the three Sapphire sponsors, R1, Blue Cross Blue Shield of Nebraska, and Baird Holm, to pick the networking event location, create a bingo game together, and decide on the menu for the event. This was a great way for sponsors from both chapters to get to know each other and HFMA members they don't usually interact with!

Goal #4: Charitable Contributions

The Iowa Chapter's Women's Conference has a long-standing history of supporting a different charity each year and we wanted to bring that tradition to our joint conference. Eide Bailly, the conference Diamond Sponsor, selected Girls Inc. to be the charitable sponsor of the event. As shown in Attachment #6 Pages 3-7, the Women's Conference website included a tab for Girls Inc. which explained their mission, vision, and values, as well as numerous options for giving to the organization. For the conference specifically, our committee set up a PayPal account to track contributions to Girls Inc. in real time and gave progress updates throughout the day. Additionally, two Girls Inc. staff and three participants in their program joined us at lunch for a presentation about their organization. We are thrilled to share that we surpassed our donation goal of $1,000 for Girls Inc. by raising $2,315! One of our speakers, Holly Hoffman, even donated the proceeds from the sale of her books at the conference, which contributed $305 to Girls Inc. See Attachment #6 Page 2 for photos of the attendees and a thank you email from Girls Inc.

Goal #5: Satisfaction Scores

Our committee was very proud of the event we had planned and was excited for all the attendees to see what we had put together and were sure they would all have a great time! However, in order to provide the best content and experience possible for future conferences, we determined it was important to survey attendees after the event. Our goal was to receive a minimum score of 4 in all polling questions and per Attachment #5, we achieved this with an average score of 4.77 and our lowest average score was 4.58 with our highest average score at 4.90. We were also pleased to see that 48 attendees responded to the survey, which was 34% of total attendees. See testimonials from several attendees on Attachment #6 Page 1.

The Region 8 Women's Leadership Conference not only met but exceeded our expectations in increasing Engagement with chapters in Region 8, providers, and business partners. We are extremely proud of the event we put together and the goals we achieved! Our hope for future women's conferences is that the other chapters in Region 8 will see the success we experienced with this event and will join us in Surviving. Thriving. and Leading as collaborators at future women's conferences!

Region Name: Region 6

Submission Type: Region

Award Title: NOW. NEAR. NEXT: Navigating the Evolving Landscape of Healthcare – Region 6 Conference

Submission Summary: Region 6 came together for the second-ever joint in-person event. The purpose was to provide quality education and extended networking in a central location. along with an experience to attract CFO's and revenue management executives. The result was a two-day conference in Central Ohio.

Needs Identification:

Region 6 committed to bringing all the Chapters together on a bi-annual basis to meet multiple needs:

Continue to work together as a region, not just five individual chapters.

Reduce duplication of conferences, thus reducing the cost and volunteer efforts necessary to plan multiple conferences.

Continue to get members re-engaged with in-person events. With so many people still working from home or only obtaining continuing education through webinars, it was important to provide face-to-face opportunities.

Unless management has been involved in HFMA, they do not understand the opportunities available for staff development. Another downside identified was employees required to take paid time off to attend any HFMA event. We wanted to remind providers of the value of HFMA and to encourage employee involvement.

Many executives stated that HFMA was for their employees, not them. HFMA did not offer education at a high enough level to provide value to their group. We needed to engage financial executives, so there needed to be education of interest to them.

Some of the chapters held quarterly CFO roundtables pre-COVID. Over time, these fizzled out. There was an unmet opportunity to bring the CFOs together at a regional level for open structured and unstructured dialogue and networking.

Needed to provide value to business partners to encourage their continued support so HFMA can provide the excellent programming that members expect.

Goals and Objectives:

The primary goal was to engage people, providers, and business partners, and provide excellent education and much needed networking time.

The objective of the Region was to bring the five Chapters together to work towards a unified goal, which was the second in-person collaborative event.

We wanted to get 50% providers to attend this event.

Another objective was to attract executive attendance.

Executive outreach was important because if they see the value, they will send staff to future local Chapter events. This event would help trigger increased local participation going forward.

Business Partner engagement was identified as key to the success of the event and the on-going support of the chapters. They needed to be able to talk to the providers, especially the executives that we hoped the conference would draw.

Methodology:

Built on the previous attempt to organize a unique CFO tract, we started with direct outreach to CFOs before planning the event to gauge their interest. Matt Cox, a local CFO and member of the HFMA Board, volunteered to chair the planning committee. The event included a private dinner the night before the conference and almost four hours of education during the conference. It was an invitation-only event with a separate Cvent registration. The roundtable was held in a different wing of the conference center and a private lunch was served. Business partners were not given access to the attendees during this time. The idea was to allow open, honest, and free-flowing conversations among their peers. CFOs who attended the round table were given free access to the rest of the conference and encouraged to meet with business partners during other times.

A separate tract was created for the revenue management executives. The plan was to mirror the CFO Experience; however, the planning sub-committee had a different vision. Instead of a private dinner, the RMEs were provided an invitation-only cocktail hour, along with almost three hours of education, which was open to anyone who wanted to attend, not just executives.

The Programming Committee worked hard to ensure a variety of topics, such as gun violence is a healthcare issue, combating bad payer behavior (from all sides), AI: intelligent/ambient hospital rooms. One of the sessions was a live podcast. Of course, we had the typical subjects, also.

We wanted to keep people together and engaged in the networking activities. We went off-site for the welcome reception the evening before the conference. During the conference, there was a cocktail hour with a photo booth. A sit-down dinner with an interactive murder mystery activity was planned. The murder mystery company circulated around the area during the cocktail hour to entertain people and prepare everyone for the dinner entertainment.

Pre-conference events were planned for the day before. Golf was one of the activities and a spa day was arranged for the non-golfers.

To boost the provider attendance, the registration cost for providers was $200, while business partner registration was $600. Group discounts were offered to any company who purchased 5 or more tickets at the same time. Enterprise members were offered a 30% discount for providers or 10% for business partners. Provider CFOs and RMEs were given a 25% discount, and 2 free registrations per organization were given with CFO and RME registrations.

Social media, such as Facebook and Twitter were used for advertising the conference, as well as the HFMA Community.

We worked to increase value to sponsors:

Offered sponsors the opportunity to hold table discussions on topics of their choice at lunch on Thursday. Table signs were posted so people could sit in on discussions of interest. Some tables were set up for open seating, so people did not have to participate.

Named the conference rooms after the sponsors.

Allowed sponsor to name the internet login.

Sponsors introduced speakers in the general sessions and breakouts.

Allowed sponsor advertising on hotel keycards.

Set up sponsor booths in the conference lobby and in the exhibit hall. Meals were held in either location to maximize exposure. Cocktail hour was held in the exhibit hall.

Evaluation and Results:

Attendance ratio was 38.7% provider compared to 34.3% in 2022 Business partner ratio was 65.7% in 2022 and 61.3% in 2024). This was much more balanced compared to the previous conference and other recent regional events. In 2022, we limited the number of business partner registrations. At this conference we chose to leave registrations open to everyone.

The CFO Roundtable event allowed CFOs to have private, open dialogue amongst peers. Also, because we provided free access to the main conference, many stayed for general sessions and networking. They all gave very positive feedback and asked that we continue this type of event in the future. CFO attendance increased from 11 in 2022 to 33 in 2024.

The RME Experience did not materialize as originally envisioned. Where the CFOs want privacy to hold open and honest dialogue with their colleagues, the RME (revenue management executives) did not feel that was necessary for their group. Revenue management encompasses a vast variety of focuses and responsibilities, making it difficult to narrow the meaningful conversations down to the appropriate participants.

Attendance was budgeted at 400 registrations. Actual registrations totaled 364 or 91% of goal. We felt this was great as many companies in this market are not willing to pay for travel or conferences. In addition, attendees are often required to use paid time off to participate. Over 100 registrations came in within the final week before the conference. Attendance increased by 92 people or 34% from the 2022 conference.

The Planning Committee had mixed feelings about holding the welcome reception off-site. Despite concerns it was decided to hold it at Fado's, which was within walking distance of the hotel (almost right next door). The welcome reception was very well received. We rented the entire facility (inside and outside) for three hours. Inside was standing room only. The weather was gorgeous, so the outdoor seating was full also. Many people stayed after the reception closed and the facility was opened to the public.

The CFO had about twelve people attend their dinner with most joining the welcome reception on the way back to the hotel. They enjoyed their time together. Only six people attended the RME reception, so this probably will not be repeated the next conference.

Pre-conference events included golf at a local golf course. Every slot was filled, and a few interested people were turned away. For the non-golfers, a spa day was planned at an area salon. People booked their own appointments, for any treatment they wanted: hair, nails, facials, and massages. There was a private area to hang out and network while waiting for their appointment. Lunch was pre-ordered, and mimosas served. Some people hung out all day enjoying the relaxed environment and great conversations.

Sponsorship revenue was budgeted at $165,770. Actual totaled $178,200, which was 7% over goal. Many sponsors stated that great connections and a few deals were made because of the number of executives in attendance. Many expressed satisfaction and stated that they had not seen that many executives in attendance at other regional conferences.

Each Chapter made a profit from the conference to go towards local programming and operational costs. Net Profit was budgeted at $8,464. Actual was $65,762, which was 677% of goal. Half of the profit was split evenly amongst the Chapters and the other half was allocated according to the attendance breakdown of Chapter members. We developed this methodology to reward Chapters for their participation in planning the event as well as encouraging their membership to attend.

We learned the hard way that sit-down dinners are not a good idea at a conference like this. Despite our efforts to keep everyone together and engaged for networking, a few of the vendors took their clients out to eat rather than stay for dinner. There was also a hurricane which hit Florida and went up the East Coast. Some people scrambled to get back home during the first day of the conference. We paid for over 75 meals that went to waste. Because we chose the sit-down style dinner, each person pre-selected their entrée; so there was no wiggle-room with the food count. With a buffet-style dinner, you can low-ball the count some, so there is less waste.

The feedback from the conference was very good. Here are a few comments about the CFO Experience:

Really enjoyed the discussion, it was excellent!

I would have loved to attend a longer CFO track.

Region Name: Regions 8 & 10

Submission Type: Multi-Region

Award Title: Pioneering Leader in Multi-Region Virtual CRCR Bootcamp Collaboration

Submission Summary: Regions 8 & 10 significantly boosted member engagement and CRCR certifications via a collaborative virtual bootcamp. This initiative led to a 13% increase in CRCR certifications within the regions and provided accessible, updated educational materials via a recorded bootcamp on the HFMA YouTube Page

Needs Identification:

As HFMA is the only organization with the in-depth certifications that cover so many financial aspects of healthcare, the Iowa and Arizona Certification chairs recognized a need for a CRCR Bootcamp for its members. The two Certification chairs had the opportunity to meet and network in person at last years' Leadership Training Conference, where this idea was brought to life. Prior to this initiative, only 1,602 members in Regions 8 and 10 held CRCR certifications. The two Certification chairs (Arizona and Iowa) wanted to see an offering to their members that would seek to increase certifications by at least 10%. In assessing the needs of these chapters, it was decided to expand this initiative across their respective regions to have a greater outreach to more of the HFMA community. This led to HFMA Regions 8 and 10 partnering to create a CRCR Bootcamp using the most updated materials provided by the Association (see attachment #4). Region 8 includes North Dakota, South Dakota, Nebraska, Kansas, Minnesota, Iowa, and Missouri. Region 10 includes Montana, Idaho, Wyoming, Utah, Colorado, Arizona, and New Mexico. This bootcamp was coordinated and created by these regions to reach beyond just the states and regions included. The CRCR bootcamp was virtual, allowing members from all chapters and non-members to attend and benefit from the bootcamp to get closer to obtaining their CRCR certification.

Goals and Objectives:

The goal was to provide a CRCR bootcamp, utilizing the most current educational curriculum, across multiple regions, to engage members across regions 8 and 10 seeking to obtain their CRCR certification (see attachment #4). Beyond these regions, the goal was to target an even broader audience by offering the bootcamp through virtual means and free of cost to all members. By offering the bootcamp virtually and free of charge, we aimed to remove financial and geographical barriers to certification, directly promoting engagement and contributing to the goal of increased CRCR certifications. This would include non-certified members, members seeking to obtain their EHRC given that CRCR is a prerequisite, and for members that were previously certified and allowed their certification to lapse.

To accomplish these goals, our team established the following key objectives:

-Focus on making sure that ALL members of these regions, regardless of enterprise status, individual or business partner status are welcome.

-Bring visibility to the value in certification as being free with membership and then also the bootcamp being offered free of charge.

-Reach a wider audience by breaking the sessions into two half days to offer more flexibility, along with providing a recorded option available shortly after live sessions. (It was later discovered that this version of the CRCR Bootcamp has been published on the HFMA YouTube page, making this valuable source of education available to all members in the HFMA community and not just the members of Regions 8 and 10.)

-Allow for community partnership and members being able to network and communicate with each other.

-Encourage members to obtain their CRCR certification as a first step to the EHRC certification.

-Set the example for other states and regions to collaborate on multi-region initiatives to engage more members in HFMA.

Methodology:

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●Updated bootcamp materials were obtained from the Association to ensure the bootcamp included the updated, relevant information (see attachment #4).

●We then worked collaboratively to recruit several HFMA members/chapter representatives who were willing to volunteer their time and effort to teach various sections of the bootcamp. Of the five members who helped put on this bootcamp, there was representation from 4 separate states (Iowa, Arizona, Idaho and Florida) and 3 separate regions (Regions 5, 8 and 10). In addition to the 8 hours it took to teach this bootcamp, there was approximately 2 hours of preparation time for each speaker within the group, not including the several hours it took each speaker to prepare and become familiar with the section they were presenting. This also included review and modification of the material to ensure completeness and accuracy. The Iowa and Arizona certification chairs spent additional time (approximately 4-5 hours each) planning for the details of this bootcamp, along with working with their respective chapter Communication chairs to publish and promote this event on social media channels and newsletters. A total of 19 (minimum) promotions for this event were sent to the HFMA Community, which includes email communications and LinkedIn posts/reposts (see attachment #5). The volunteer speakers not only provided expert instruction but also fostered a sense of community and peer support, encouraging greater participation.

●Identify a HFMA representative who could monitor the live Q&A section and provide accurate and timely clarification to questions. This representative was needed for each section of the bootcamp and attended for the entire duration.

●Bootcamp was completed virtually on July 17th and July 18th.

●Bootcamp was recorded and shared with attendees and posted on the HFMA YouTube page.

Evaluation and Results:

This multi-region, CRCR Bootcamp was completed on July 17th and 18th of 2024 and was incredibly successful. There were a total of 486 registrations for the virtual bootcamp, which does not include the members that watched the bootcamp on the HFMA YouTube page. The results that came from the bootcamp on the CRCR certifications were remarkable and demonstrate the engagement made possible by this initiative.

Of the 486 registrations, 80 members have already taken the CRCR final exam and passed! This is a 16.46% success rate (see attachment #1). Of the 80 members who passed, 29 were from Region 8 and 51 were from Region 10.

The overall increase in CRCR certifications for the regions and states involved in this initiative are reflected in attachment #6.

We also saw an impactful increase in CRCR Certification from two specific region 10 states- Montana and Wyoming. The results following the bootcamp as outlined below (see attachment #6):

The results were not just achieved by Regions 8 and 10. Upon review of the HFMA registrations for this bootcamp, it was discovered how significant the outreach was as illustrated by the following data. Of the 59 distinct HFMA chapters defined by HFMA, there was attendance from 31 of the chapters, which equates to 53% of HFMA chapter representation (see attachment #1 “Summary State and Region Attend tab”)! Of the 11 regions defined by HFMA, 8 regions had presence at the bootcamp which is 73% representation (see attachment #1 “Summary State and Region Attend tab”)! The 53% chapter attendance and 73% regional attendance demonstrates the widespread interest in CRCR certification and the effectiveness of the multi-region collaboration in reaching members across diverse chapters. We credit this outreach to the outstanding social media and email promotion for this bootcamp from the Arizona and Iowa Communication committees (see attachment #5) (described above under “Methodology”).

An unexpected benefit of the success of this virtual, multi-region collaborative bootcamp, was how easy this would be to replicate across other chapters or regions, and at various intervals throughout the year.

This initiative resulted in prepared bootcamp slides and a recorded version of the bootcamp. This recorded version can serve as a "how to" guide to other chapters/regions who would like to host their own bootcamps and drive engagement within their chapters and regions. Additionally, the recorded version can be provided to chapter and region members with the option for study groups, online meet-ups to discuss questions, etc. The possibilities truly are endless.

It goes without saying that our goals and objectives were not just met, but far exceeded! This bootcamp was originally intended to reach only Iowa and Arizona, then modified to include Regions 8 and 10, but the outreach and visibility of this bootcamp reached far more of the HFMA community. Its value will be ongoing as evidenced by the publication of the materials on the HFMA YouTube page. It was an honor to have been a part of this very important and value of HFMA membership.

INNOVATION CATEGORY

Chapter Name: Arkansas

Submission Type: Chapter

Award Title: Welcome to the PIG Trail to OneHFMA!

Submission Summary: Arkansas HFMA created the "PIG Trail to OneHFMA" to reach providers in the rural areas of our state.

Needs Identification:

Of the 112 hospitals in the state of Arkansas, 28 hospitals are designated as Critical Access Hospitals. All hospitals are facing rising costs and workforce challenges. These challenges are exacerbated in rural communities due to smaller pools of educated workers; not just clinical workers, like nurses and doctors, but also support staff, like revenue cycle or business office staff. Oftentimes, hospitals are forced to hire staff with no experience in a healthcare setting and don't have the resources to provide them with training necessary to be successful in their roles. HFMA has the resources and ability to help these hospitals provide the necessary training for these inexperienced hires.

Of the 28 CAH facilities in Arkansas, only five have at least one HFMA member. Seven CAH facilities in the state are part of a larger health system and/or are HFMA enterprise members that have not been actively engaged with Arkansas HFMA. At LTC 2024, Arkansas chapter leaders discussed feedback received from hospital leaders throughout the state who have not been actively engaged with HFMA. We found that cost is overwhelmingly a barrier to membership. But what we also found is that these hospital leaders don't fully appreciate all the benefits of HFMA membership. We believed that if we could get hospital leaders and their staff to attend a meeting and hear about HFMA membership as well as receive a quality education program close to home, we could prove the value of membership in HFMA.

Goals and Objectives:

Our goal was simple: Expose more CAH and rural healthcare workers to the value of HFMA and benefits of membership. In order to meet this goal, we wanted to host a meeting focused on CAH-relevant topics in the four corners of the state. We wanted the event to be free and open to non-HFMA members. Since the idea for this program was born at LTC in late April 2024 and further developed at our mini-LTC event in early May, we had to plan fast if we wanted to get the event to occur in this chapter year. We wanted a catchy name for the program, too!

Methodology:

The Arkansas chapter developed a new education program specific to the needs of CAHs and rural healthcare providers, to meet these workers where they are, by hosting four sessions in each corner of the state. This program was named the

"PIG (Providers, Information, Gathering) Trail to OneHFMA." (Pig Trail is a well-known scenic byway in our state.) In addition to providing quality education, we also wanted to provide information on the benefits of becoming an HFMA member as well as how to get involved in the local chapter. These are the steps we followed to make this program a success:

Plan it.

a.Assign a committee – We needed to plan fast so we relied on the chair and co-chair of the CAH committee that were already established and any board member that was willing to participate, which was all of them. Members of the committee included:

Melodie Colwell – Consultant at Stroudwater Associates, a consulting firm focused on providing services to rural healthcare organizations across the country

Bill Craig – CFO at Howard Memorial Hospital, a CHARTIS Top 100 CAH facility

Andrew Davis – VP Business Development at MSCB, Inc.

Kayla Hill – Director of Health Information and Privacy Officer at Ashley County Medical Center, a CAH facility

Kristi King –Revenue Cycle Director at Ozark Health, a CAH facility

April Miller – Regional Sales Executive at Professional Credit Management, Inc.

Misty Prater – Provider Strategy and Value Manager at Arkansas BCBS

Josh Reaper – Senior Manager, Forvis Mazaars

Brian Smith – CFO, Southern Administrative Services

Phillip Thomas – Strategic Relationship Manager at Impact Healthcare Solutions

b.Identify meeting locations – The vision we had for this program was to bring education to the rural healthcare workers that may not have the knowledge of HFMA or opportunity to attend our regular meetings.

First, we obtained a list of Critical Access Hospitals within the state. We divided these hospitals into sections – Northeast, Northwest, Southeast, and Southwest – and then identified a hospital facility that may be able to host our event. Committee members were assigned a location to contact. With the exception of the Northwest region, all the venues for the meeting were rural hospitals in the selected region. Due to the proximity of hospitals in Northwest Arkansas, this regional event was held in a metro area in a facility with sufficient meeting space.

Meetings were held at these locations:

Northeast: Arkansas Methodist Medical Center, Paragould, AR

Northwest: Washington Regional Medical Center, Fayetteville, AR

Southeast: Baptist Health Medical Center – Drew County (formerly, Drew Memorial Health System), Monticello, AR

Southwest: Howard Memorial Hospital, Nashville, AR

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c.Develop the Program and Secure the Speakers – This program was focused on CAH and rural healthcare in Arkansas. Our committee brainstormed topics relevant to CAH/rural healthcare and narrowed the list to those topics we felt would be the most meaningful to the largest pool of workers.

Once topics were chosen, we identified potential speakers within our chapter that could present on each topic chosen. Committee members contacted potential speakers and explained the vision for our program. We knew that asking a speaker to commit to giving the same presentation four times at four different locations on four different days would be asking a lot. Not to mention that we were asking them to do it for free! We were grateful that each speaker contacted not only understood the vision but was also willing and excited to participate in our program.

The Program included:

Arkansas BCBS Critical Access Hospitals: A vital sign of care - Presented by Creshelle R. Nash, Arkansas BCBS Medical Director

Cost Report Best Practices - Presented by Melodie Colwell, Stroudwater Associates

Ozark Health Medical Center MAP Award - Presented by Kristi King, Revenue Cycle Director and Robin Corley, CFO

General Intro to HFMA - Presented by Melodie Colwell, Arkansas HFMA President

Chargemaster Opportunities - Presented by Vonda Walters, President, Revenue Integrity Management Resources

Strategies for Communications to the Board - Co-Presented by Josh Reaper, Forvis Mazaars and local CFOs at each event

Medicare Advantage Issues Round Table - Presented by Ozark Health Revenue Cycle Team

d.Estimate the cost – The next step was to estimate the cost of hosting four meetings across the state. Thankfully, each venue agreed to host the meeting at no cost to us. That meant the only cost would be the cost of food. We provided a box lunch for each attendee and offered prepackaged breakfast and afternoon snacks at each location. Host sites graciously offered coffee and water.

Because our goal was to expose more non-members to HFMA, we also wanted to choose one attendee from each location to win the opportunity to attend our Spring meeting at no cost. We agreed to cover all reasonable expenses (2 nights hotel, registration, mileage, and meals not provided at the meeting) for the winner at each location.

Our total estimated cost for all four meetings was between $3,500 and $3,700.

Make it free.

This program was not included in the budget for 2024-2025, so we needed to find a way to cover the costs of this program. The highest sponsorship level for our chapter is Diamond. We currently have 10 diamond sponsors. Our idea was to offer our Diamond Sponsors the first opportunity to sponsor this new program. Since attendance at the meeting was limited to providers, we believed that offering our Diamond Sponsors with an additional opportunity to network with providers would be added benefit to the sponsor. No other sponsors would be given this exclusive opportunity and time for networking.

We contacted each Diamond Sponsor and asked for a sponsorship of $500. This would be in addition to their annual sponsorship, but the opportunity to meet in a small setting with providers made the additional investment worth it to many of our Diamond Sponsors. Of the 10 sponsors contacted, seven agreed to sponsor the program, providing $3,500 to fund the program. Each of those sponsors was invited to attend each event. The board agreed to absorb any costs over and above the $3,500 raised through sponsorship. Actual expenses are currently $2,818, however this will increase once our prize winners have attended the Spring meeting in April and reasonable expenses have been paid.

Our chapter president drafted an email to send to each Diamond Sponsor, outlining the benefits and the request. The email “AR HFMA Special Event – Diamond Sponsor opportunity” has been included as an attachment to this submission.

Name it.

We didn’t want this to be just another regular meeting! We wanted a catchy name for the event that really captured the essence of our goal for the program. After much discussion and many good ideas, our committee settled on “PIG Trail to OneHFMA”. The Arkansas Pig trail is a scenic byway that winds through the Ozark mountains and was the inspiration for our title because it’s specific to our state and well-known throughout Arkansas. In our title, PIG stands for:

P – Provider – Other than event sponsors and speakers, this program was exclusive to providers

I – Information – We wanted to provide information important to CAH facilities as well as information about HFMA

G - Gathering – This event was about providers gathering together and networking to learn from speakers and from each other

We wanted to include OneHFMA in the title to indicate that participants would take this trail to learning more about HFMA.

Promote it.

Since we were targeting non-HFMA members and others who were not actively engaged with ARHFMA, we would have to promote the program differently than other events. We started with a generic email to our members that are employed at CAH/rural organizations as well as key contacts at CAH facilities with no HFMA membership inviting them to the program. Committee members then followed up by sending personal emails to individual contacts at the targeted CAH facilities. Some committee members also made phone calls or face-to-face visits inviting employees to attend. All contacts were encouraged to share the invite with others in their organization or anyone else that might benefit from the program.

Survey results indicated that these emails were more effective than social media in reaching our target audience.

A save-the date graphic was created and posted to social media and a brochure was created and sent with email invitations. Both of these graphics have been attached for reference.

Evaluation and Results:

Registration Distribution

We had a total of 80 unique registrants combined for all four events. 60 of the total registratants were providers. Of the 60 unique provider registrants, 45 were not HFMA members. With our goal being outreach to those that have not been involved in HFMA, this event was a success.

Membership Inquiries

Each event included a lunch presentation about the HFMA membership, including benefits such as HFMA certifications and online communities, and highlighted the benefits of networking within our chapter as well as nationally. The presentation generated meaningful discussions, especially surrounding enterprise membership and certifications available to HFMA members.

As a result of these events:

•Three facilities have expressed interest in enterprise membership (Arkansas Methodist Medical Center, St. Bernards, and Dallas County); one has completed enrollment as a new enterprise member (Sevier County Hospital)

Survey Results

We used Cvent to survey all registrants for the program. We sent out approximately 80 surveys and received 22 responses, which is a 28% response rate. The overall event rating was 4.82 out of 5. Topics overall were rated 4.82, speakers overall were rated 4.91, and networking overall was rated 4.77.

Some comments received were:

"This was a great event and was a great networking opportunity. I enjoyed the smaller group that really allowed the group to have open conversations about trending issues. It was great to hear other facilities are facing the same issues and they offered some resources to assist our facility in streamlining account notations."

"I loved the idea of regional meetings. It means less travel for members especially in times when travel is restricted by employers."

"The meeting was very informative and I had some important take aways from the speakers."

"I felt the conversation was very inclusive and had enough time to hold open discussions, etc."

Continued Outreach

We will continue to reach out to non-members that attended one of the events and provide information on how to join, how to demonstrate value of membership to their own organization, who to contact for questions, and answer any questions they may have about membership, meetings, or resources within HFMA. Those contacts will be added to a "friend list" and will receive email notifications of upcoming events.

Moving Forward

The board and committee voted that going forward, we will host 2 CAH/Rural meetings in the northern and southern regions of Arkansas. The time commitment required for four meetings was more than we feel is sustainable in future years. The current CAH chair and co-chair will select additional committee members to plan the program for these meetings. We will include this event in the budget for 2025-2026 and may consider a nominal charge to cover the cost of food, although this is not yet confirmed.

Chapter Name: Central Ohio

Submission Type: Chapter

Award Title: Submission for the Central OH HFMA Chapter Success Award: Goal - Innovation

Submission Summary: Our chapter launched a video campaign to enhance volunteer engagement, resulting in a 36.73% increase in committee volunteers. With nearly 2,500 impressions and a 5.97% engagement rate, the initiative drove awareness and action. 95% of volunteers feel supported, and 27% aspire to leadership roles.

Needs Identification:

To address the ongoing challenge of effectively communicating Chapter Committee volunteer opportunities, our chapter identified a significant gap in member engagement and awareness. Despite the critical role committees play in driving chapter initiatives and professional development, many members, particularly early careerists and students, were unaware of available opportunities or the benefits of participation. Traditional outreach methods, such as emails and event announcements, were proving insufficient in capturing attention and driving action. Data from member feedback surveys and participation metrics confirmed this disconnect, revealing low levels of volunteer recruitment and engagement. With digital engagement becoming an increasingly dominant force in member communication, it was clear that a new, more dynamic approach was needed to effectively reach and inspire potential volunteers.

Goals and Objectives:

The primary goal of this initiative was to increase awareness and participation in chapter committees by leveraging innovative communication methods. Objectives included:

•Creating and publishing seven committee-specific videos by the end of the association year.

•Achieving measurable digital engagement, including impressions, clicks, and engagement rates, with a target of at least a 5% engagement rate (aligned with industry benchmarks).

•Adding new volunteers to chapter committees as a direct result of increased awareness and outreach.

These objectives were both significant and challenging, targeting key audiences such as student leaders, early careerists, and existing members, with the aim of enhancing volunteer involvement and chapter sustainability.

Methodology:

To achieve these goals, the following steps were taken:

1.Video Production: Developed a series of seven professionally branded, committee-specific videos highlighting each committee's purpose, activities, and member benefits. Committee chairs and active volunteers were featured to personalize and add authenticity.

•Challenge: Securing volunteers who are willing and comfortable to record videos.

•Solution: We provided coaching, pre-scripted talking points, and multiple recording attempts to ease nerves and encourage participation.

2.Targeted Distribution: Videos were shared on LinkedIn, the chapter website, and during chapter events. LinkedIn posts were tailored with targeted messaging to engage specific audiences, such as students and early careerists.

•Challenge: Encouraging busy volunteers to make time for recording.

•Solution: We scheduled flexible recording sessions and leveraged virtual options to accommodate different schedules.

3.Resource Allocation: Volunteers contributed over 50 hours to scriptwriting, filming, and editing, with additional support from the communications committee for social media posting and analytics tracking.

•Challenge: Finding someone to edit the videos professionally.

•Solution: We collaborated with a volunteer with video editing experience and utilized basic editing tools to ensure a polished final product without additional cost.

4.Measurement: To ensure the success of this initiative, we established a robust tracking system to measure engagement and continuously refine our approach. Key performance indicators (KPIs) such as impressions, clicks, and engagement rates were monitored weekly using LinkedIn analytics. In addition, committee sign-ups were tracked to assess the direct impact on volunteer recruitment. Rather than relying on a static strategy, we used these insights to adjust our approach as needed. Early engagement data helped us identify which types of content resonated most with members, allowing us to refine messaging, optimize posting times, and enhance targeting strategies. This iterative process ensured that we maximized the campaign's effectiveness, leading to sustained engagement and increased volunteer participation over time.

Evaluation and Results:

This initiative has driven measurable improvements in volunteer engagement and committee participation:

•Volunteer Growth: Since the start of the association year, 18 new volunteers have joined chapter committees, representing a 36.73% increase from the original base of 49, bringing the total to 67.

•Digital Engagement: Seven committee videos have generated nearly 2,500 impressions, 75 clicks, and an average engagement rate of 5.97%, exceeding industry benchmarks for social media interaction.

•Volunteer Satisfaction & Retention:

oVolunteers report a 4.74/5 average satisfaction rating with their overall experience.

o95% of respondents say our leadership team provides adequate support for volunteers to be successful.

o84% plan to continue volunteering next year, with 27% expressing interest in moving into a leadership role on a committee.

•Broader Impact: These results demonstrate that the initiative is not only attracting volunteers but also fostering long-term engagement and leadership development within the chapter.

Supporting Documentation

•Video Links: Links to committee-specific videos below & via Appendix C - Video Links.

oCommunications Committee - Communications - COHFMA on Vimeo

oEarly Careerist Committee - Early Careerist - COHFMA on Vimeo

oGives Back Committee - Gives Back - COHFMA on Vimeo

oMembership Committee - Membership - COHFMA on Vimeo

oProgramming Committee - https://vimeo.com/1061619360?share=copy

oNetworking Committee - Networking - COHFMA on Vimeo

oSponsorship Committee - Sponsorship - COHFMA on Vimeo

oStudent Leadership Committee - Student Leadership - COHFMA on Vimeo

•Engagement Analytics: Detailed LinkedIn metrics report.

oSee Attached Appendix A - hfma-central-ohio_content_engagement metrics

•Volunteer Sign-Up Data: Records showing the 15 new committee volunteers.

oSee Attached Appendix B - COHFMA Micro Volunteer List – Final

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Chapter Name: Northern New England & Massachusetts-Rhode Island

Submission Type: Multi-Chapter

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Award Title: UNH Student Involvement and Career Development

Submission Summary: Active student involvement adds depth to our chapters by providing educational opportunities to our young careerists and better insight into the next generation of healthcare professionals for our existing members.

Needs Identification:

The need to promote and encourage early and active involvement in Healthcare Financial Management Association and early career and professional development is a critical path for our future as a Chapter, Region and the Healthcare Industry.

Goals and Objectives:

Identified in our 2024-2025 Chapter Success Plan was to "Increase out Student Involvement."

Innovation Success Plan Description:

We are in our third year of University of New Hampshire (UNH) student involvement at our annual meetings and will be holding a second-year conference focused on collaboration with ACHE (American College of Healthcare Executives)/NNE HFMA held annual at UNH in Durham, NH. We are focused on enhancing these relationships and expanding the student involvement to other students by way of reaching out and engaging with professors of healthcare finance related programs. We plan to utilize the student memberships made available to us by HFMA national.

This year we will also focus our attention on the data surrounding this initiative as we are in particular in our third year of engagement with UNH and determining if this longer-term relationship has had impact on recent or upcoming graduates as it relates to our industry and the importance of associations like HFMA play in education/networking which may generate valuable connections and any leads with HFMA members or enterprise members.

Innovation Success Plan Objectives:

1.Utilize HFMA National's new Student Scholarship Memberships.

2.Continue to build our relationship with UNH to further engage with Students and Professors.

3.Explore relationships with other Universities in the NNE (ME, NH, VT) region.

4.Explore the opportunity to provide free memberships to University Professors to increase our student engagement.

Methodology:

A.# of attendees to recurring NNE HFMA meetings

B.Student memberships taken advantage of during 2024 -2025

C.Survey of UNH past and current students involved with HFMA

Evaluation and Results:

One of our NNE HFMA Board Members, Mark Bonica is an Associate Professor with the University of New Hampshire in Durham, NH. He oversees the Health Management & Policy program and has been an advocate for student involvement with our local Chapter. The following is evidence of his involvement bridging the gap between his students' academics and post-graduate professional development. The NNE Board has worked collaboratively with him and the students in what is evolving into a model we can replicate with other higher education programs.

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Number of Attendees at recurring NNE HFMA Meetings:

At the two previous Northern New England Annual Meetings, held in North Conway, NH there were UNH students in attendance. At each of the two meetings there was a dedicated Round Table Meet the Students session included on the meeting Agendas. This included an opportunity for the students in attendance at the meetings to debrief with another student and other HFMA attendees to discuss prior agenda sessions, why they chose healthcare and ask questions of those at the session.

Number of students attending NNE Annual Meeting and round table exercise:

•March 2024 – North Conway, NH - 8 students (Attachment A)

•March 2023 – North Conway, NH – 9 students (Attachment A)

Student feedback from the March 2024 NNE Annual Meeting was published in the NNE HFMA May 2024 Newsletter and included multiple student responses. (Attachment B)

Number of students attending joint American College of Healthcare Executives (ACHE)/NNE HFMA conference at UNH:

•October 2024 – 36 students

•October 2023 – 34 students

We currently have one UNH student attend our monthly Board meetings to observe and utilize as a learning experience. This student has also interned for an Enterprise Vendor and Corporate Sponsor. She has accepted a full-time position and will begin with this member after her upcoming anticipated 2025 graduation. She recently has provided suggestions to our communications committee related to distribution of newsletter and Mountain Minute information.

Student Memberships Taken Advantage of During 2024 – 2025 - (Attachment C):

Student memberships were created at the National level during FY 2024 - 2025 in which 100 student memberships were provided to each region. Of the 25 student memberships enrolled within Region 1 – 100% of current fifteen (15) Region 1 student memberships are for students with the NNE HFMA chapter (one was designated as NY Chapter.)

Results from UNH past and current students survey conducted in February 2025 (Attachment D):

Question 1: Graduating class – 2023, 2024 or 2025

•40% of respondents were 2023 graduates

•20 % of respondents were 2024 graduates

•40% of respondents are upcoming 2025 graduates

Question 2: Have you stayed in contact with at least 1 HFMA contact met during a HFMA round table, networking or other event? 2 or more?

•40% of Respondents have had conversations with more than one HFMA member met since the event

•40% of Respondents have had conversations with one HFMA member met since the event

•20% of Respondents made LinkedIn connections but not personal relationships with members met at a HFMA event

hfma

Question 3: Did you obtain an internship or full-time position as a result of your exposure to contacts through NNE Chapter of HFMA?

•20% of respondents obtained a full-time position as a result of exposure to contacts through NNE Chapter of HFMA while only 40% of respondents are graduating this year and full-time eligible.

Question 4: Did attending and participating in HFMA events through the NNE chapter provide additional perspective related to a potential career in healthcare? Please briefly describe:

•"Attending the HFMA events were eye opening as I was able to see presentations with the revenue cycle and how it applied to healthcare organizations."

•"It definitely provided a lot of insight into what different healthcare paths we were able to choose from postgraduate."

•"Yes, I learned more in depth about topics such as revenue cycle, and the on going financial hardships faced by healthcare organizations."

•"Yes, I was able to connect with my internship employer through the 2024 NNE HFMA Annual Conference. I had my summer internship which was extended through my senior year of college and lead to a full-time position post my 2025 graduation."

•"Attending and participating in the HFMA events through the NNE chapter did provide additional perspective related to a potential career in healthcare as I was able to meet and learn about different careers from individuals I spoke to at the events. It was interesting to hear about the career journeys of the speakers or people I was sitting at a table with."

The benefits of student involvement at our meetings has overflowed to our neighboring chapter of Massachusetts – Rhode Island. Of the prior graduates attending NNE HFMA events include:

•In review of the UNH students involved in the HFMA annual meetings 10 of 18 participated in internships with healthcare related organizations. Of those Organizations with internships, two (2) were Enterprise Members located within the NNE Chapter. Although the relationship between UNH and NNE HFMA has remained strong it is not without also recognizing the benefits experienced with the neighboring chapter (Massachusetts-Rhode Island) and within HFMA Region 1. Of those ten (10) UNH student internships the healthcare organizations were located as follows: 20% in Massachusetts, 20% in Maine and 60% in New Hampshire. (Attachment E)

•Eight of the eighteen presently work in healthcare within Region 1.

•Through mutual connections made with the NNE HFMA Chapter, the Massachusetts-Rhode Island Chapter held an annual New to Healthcare Conference on October 25, 2024 in which UNH students were invited to attend. There were twenty-one (21) students signed up for the event with fifteen (15) of the twenty-one (21) in attendance at the event. (Attachment A)

VALUE CATEGORY

Chapter Name: Rochester Regional

Submission Type: Chapter

Award Title: Emphasizing the Value of HFMA Certifications

hfma

Submission Summary: Rochester Regional Chapter in Region 2 has devoted a significant amount of time and effort into communicating the value of certifications to our membership, resulting in 200% increase in certified members in 3 years.

Needs Identification:

Rochester Regional Chapter did a deep dive into how our chapter can ensure that the members are getting the most out of their membership. Through conversations with the members, we noticed that the vast majority of members were unaware of the various certifications offered by HFMA. They specifically were unaware that the cost of certification was covered in their annual membership price.

Goals and Objectives:

HFMA serves as crucial support structures for individuals looking to advance their careers, gain specialized knowledge, and network with others in their field. HFMA offers various benefits to members, including access to educational resources, exclusive networking events, and career support. However, one of the most underutilized and yet powerful benefits is the provision of free certifications.

These certifications not only add value to a member's professional profile but can also help open doors to new opportunities. Despite the significant benefits these certifications can provide, many association members remain unaware of their availability. Increasing communication about free certifications can enable members to fully leverage their association membership, ultimately leading to stronger professional growth, enhanced career prospects, and a more engaged membership base.

By examining the current barriers to communication, identifying strategies for improvement, and exploring the potential benefits of greater awareness, the Rochester Regional Chapter worked to create a comprehensive approach to ensuring that members utilize these certification opportunities to their fullest potential.

Many members were simply unaware of the full range of resources available to them. Free certifications may be one of the most under-communicated benefits in the Rochester Regional chapter. Members often join the chapter for networking and education opportunities, but fail to realize that their membership also grants them access to endless education and certification programs that can advance their careers.

Even when members are made aware of certification opportunities, the communication channels themselves can often be inadequate. Historically, the Rochester Regional Chapter relied on one-way communication via email, which can become overwhelming or overlooked, especially with the increased phishing filters added to Healthcare security measures. Additionally, the information may not be tailored to individual member needs or preferences, resulting in missed opportunities.

While certifications are available, members struggled to understand the process of obtaining them or how they align with their specific career goals. Clear guidance is necessary to help members navigate these options, as well as to illustrate the tangible career benefits of obtaining these certifications. Without this guidance, members failed to act on the opportunities presented to them.

The goal of the Rochester Regional Chapter was to increase the number of certified members, providing value to our members and the organizations that they work with. The chapter originally strived to increase our certified members by 5%, per year, beginning in 2023. In addition, we wanted to ensure that this vital value add was marketed appropriately to our Enterprise Organizations, whose employees would benefit the most from certification.

Methodology:

1. Newsletter:

Chapter leadership emanated the idea to implement an electronic newsletter which we felt could become an incredibly effective tool for increasing awareness of education, networking and certification opportunities within the chapter.

One of the most significant advantages of implementing a newsletter is its ability to deliver direct communication to the members. Unlike general social media posts or website content, newsletters go straight to a member's inbox, ensuring that the information is received by a highly relevant audience—HFMA members who have already shown interest in the organization.

Leadership also noticed an increase in LinkedIn traffic as we began to post more frequently and utilized the option to add members to the Linked In page on a monthly basis. Each leader took the time to invite individuals to the newly revamped Linked In page in order to begin sharing information effectively. As the newsletter was developed and adapted to become more interactive with links and targeted information, the Newsletter was broken into pieces and posted as Linked In posts, highlighting various topics within the Newsletter, including education opportunities, new membership highlights, sponsor recognition, newly certified members, information on becoming certified and many different networking opportunities across the Region.

2. Personalized Welcome Email

The membership committee also began to send personalized emails to each new member to educate about certification opportunities if they're not reminded about them regularly. Newsletters can be used to send periodic reminders of upcoming deadlines or new certification offerings, keeping certifications top of mind, but a personalized email welcoming the member and providing crucial information on how to utilize their membership to the fullest is the best way to connect with the new members to educate and make them feel a part of the chapter.

Evaluation and Results:

As a result of the additional targeted newsletter and extremely educational welcome emails, the Rochester Regional Chapter has seen a 200% growth in certified members between 2022 and 2025. The huge push in 2023 led to 17 new certified members, bringing total certified members from 48 to 65, there was a slight decrease in newly certified members year over year during the 2023-2024 HFMA year, where we saw an increase from 65 to 77. Although we only saw 12 new certified members in 2023-2024, we still saw a net positive to our certified members. 2024 was the year we did a huge push to send out the electronic Newsletter on more than one platform, and year to date we have seen a 58% growth year over year during the 2024-2025 year, bringing total certified members to 96, as of February 1, 2025, up from 48 in 2022.

Chapter Name: Lone Star, South Texas & Texas Gulf Coast

Submission Type: Multi-Chapter

Award Title: CRCR Bootcamp

Submission Summary: The three Texas Chapters enhanced the CRCR Boot Camp, offering a more robust program to better prepare attendees for their certification exam. Our nationwide targeted marketing, regardless of HFMA membership, highlighted HFMA benefits and broadened its footprint to a new demographic.

Needs Identification:

1. Enhance program delivery with more comprehensive content offering provider and partner let education sessions

2. Broaden participation to members and non-members of the benefits of membership and certifications

3. Offer cost free access to all

4. Offer free CEU's that directly impact roles and promotability

5. Effective collaboration between education, webinars, and certification committees across the three Texas Chapters strengthening our relationships and chapters

6. Promote engagement during sessions

7. Increase HFMA benefit awareness and certified members across the state

8. Improve resource accessibility

Goals and Objectives:

1. Goal: Enhance Program Delivery

   - Objective: Develop a robust CRCR Bootcamp with comprehensive content led by providers and partners.

2. Goal: Broaden Participation

   - Objective: Achieve nationwide reach with attendees from multiple states, including non-HFMA members.

3. Goal: Ensure Accessibility

   - Objective: Offer the Bootcamp at no cost to participants, regardless of HFMA membership status.

4. Goal: Provide Continuing Education

   - Objective: Offer 8 free CEUs to participants.

5. Goal: Foster Effective Collaboration

   - Objective: Coordinate efforts between education, webinars, and certification committees.

6. Goal: Increase Engagement and Incentives

   - Objective: Conduct interactive sessions and provide incentives like gift cards and monetary rewards for passing the CRCR.

7. Goal: Boost Marketing and Awareness

   - Objective: Implement social and video campaigns to increase awareness and registrations.

8. Goal: Ensure Resource Accessibility

   - Objective: Make session materials available for future reference.

9. Goal: Measure Success

   - Objective: Track certification rates and gather positive survey feedback.

10. Goal: Continuous Improvement

   - Objective: Collect and analyze attendee feedback to refine and enhance the program.

Methodology:

1. Planning and Collaboration:

- Stakeholder Involvement: Engage Texas Chapters and committees (education, webinars, certification) to plan the Bootcamp.

- Define Objectives: Establish goals such as enhancing program delivery, broadening participation, and ensuring cost-free access.

2. Program Development:

- Content Creation: Develop robust CRCR content led by providers and partners.

- Session Structuring: Plan four 2-hour sessions spread across September to December 2024.

3. Marketing and Outreach:

- Targeted Marketing: Implement nationwide outreach, regardless of HFMA membership status.

- Awareness Campaigns: Use social and video campaigns to increase awareness and registrations.

4. Execution:

- Session Delivery: Conduct interactive sessions, including a Kahoot session for engagement.

- Incentives: Provide incentives like $25 gift cards and $200 for passing the CRCR.

5. Resource Provision:

- Material Distribution: Make session materials accessible for future reference.

6. Evaluation and Feedback:

- Survey Distribution: Collect feedback through surveys to assess participant satisfaction.

- Success Metrics: Measure success through certification rates and survey results.

7. Continuous Improvement:

- Analyze Feedback: Use attendee feedback to identify areas for improvement.

- Iterate and Enhance: Continuously refine the program based on feedback and success metrics.

Evaluation and Results:

1. Certification Success:

- 135 CRCR Certifications Obtained:

  - Lone Star: 70

  - South Texas: 44

  - Gulf Coast: 21

2. Survey Feedback:

- Recommendation: 99% of respondents would recommend the event.

- Topic Ratings: 98% rated the topics as Above Average or Excellent.

- Presenter Effectiveness: 96% rated the presenters' effectiveness as Satisfied or Very Satisfied.

- Overall Event Rating: 94% rated the overall event as Above Average or Excellent.

3. Attendee Quotes:

- MD Anderson: Praised the delivery of information and the clarity of answers.

- MD Anderson: Acknowledged passing the CRCR exam with an 85% score, attributing success to the Bootcamp.

- AdventHealth: Appreciated the interactive presentation style and the ability to stay focused.

- Texas Health Resources: Found the event informative and effectively interactive.

4. Engagement and Incentives:

- Kahoot Session: High engagement during the December session.

- Incentives: $25 gift cards given to 40 participants and $200 incentives for Texas Health Resources employees who passed the CRCR.

5. Reach and Participation:

- 409 Attendees: From Texas and 14 other HFMA chapters across 15 states.

- 61% Provider Participation: Significant involvement from healthcare providers.

6. Continuing Education:

- 8 Free CEUs: Provided to participants.

These results highlight the success and impact of the CRCR Bootcamp, demonstrating high levels of engagement, satisfaction, and certification achievement.

Region Name: Region 4

Submission Type: Region

Award Title: Region 4 Lunch and Learn Webinars

Submission Summary: In 2023, the Region 4 webinar series was restructured to address challenges with turnover and inconsistent scheduling. A new approach was implemented, involving a dedicated representative from each chapter and a Webinar Committee Chair to improve coordination. The goals included increasing webinar attendance.

Needs Identification:

During the 2023 Leadership Training Conference (LTC), we discussed the need to restructure the Region 4 webinar series. The series had slowed down due to turnover and was not consistently meeting the goal of hosting monthly webinars. We explored the idea of having a dedicated representative from each chapter, improving communication, and appointing a Webinar Committee Chair to help coordinate needs and address questions. Recognizing that organizing the monthly regional webinar is a significant amount of work, we wanted to relieve the pressure from any single chapter.

Goals and Objectives:

Increase Webinar Attendance: Focus on strategies to boost registration and participation in the webinars, such as targeted marketing and audience engagement efforts.

Maximize Engagement: Increase attendee interaction through Q&A, polls, and discussion, ensuring the webinar feels interactive and engaging.

Ensure Regional Chapter Involvement: Provide each chapter the chance to host a webinar, with responsibilities including securing speakers, completing the required One HFMA forms, managing the Cvent setup, and hosting the live session. Make sure that all team members and chapter representatives clearly understand their roles and responsibilities. Establish regular check-ins or updates to ensure ongoing clarity and smooth coordination.

Foster Collaboration: Foster open communication between the webinar committee and chapter representatives to facilitate brainstorming and the exchange of ideas for speakers and topics. Plan the topics, speakers, and assign chapters for each month ahead of time. Maintain a backup list of potential speakers and topics to ensure you're prepared in case any plans fall through, helping you stay on track with your monthly goals.

Methodology:

To execute these goals and objectives, the following structured methodology will be employed:

Centralized Leadership and Clear Roles:

Appoint a Webinar Committee Chair responsible for overseeing the overall coordination, ensuring smooth communication, and providing support to chapter representatives.

Define and communicate clear roles for each chapter, so everyone understands their specific responsibilities, timelines, and the expected outcomes.

Collaborative Planning and Scheduling:

Develop a content calendar that is collaboratively created with chapter representatives, mapping out topics, speakers, and chapter assignments for each month.

Keep an updated backup list of speakers and topics to ensure continuity in case of unexpected changes.

Effective Communication:

Use a centralized communication platform (e.g., Slack, Google Drive, Trello) where all chapter representatives and the webinar committee can share ideas, track progress, and access necessary resources.

Schedule regular check-ins with chapter representatives to monitor progress, provide support, and keep everyone aligned on expectations.

Engagement Strategy:

Interactive Components: Plan for interactive elements (e.g., polls, Q&A, etc.) within the webinars to foster engagement.

Monitor attendee participation to gauge engagement levels and adjust content delivery as needed to keep the audience interested.

Feedback and Continuous Improvement:

Collect post-webinar feedback from attendees and chapter representatives to identify areas for improvement.

Use this feedback to make necessary adjustments for future webinars, ensuring continuous enhancement of content, delivery, and organization.

Track webinar registration and attendance data to assess the effectiveness of marketing efforts and adjust strategies as needed.

This methodology aims to provide a structured and collaborative approach to revitalizing the Region 4 webinar series. By restructuring the coordination process, fostering consistent chapter involvement, and employing targeted engagement strategies, the region can achieve its goals of increased attendance, improved interactivity, and enhanced collaboration. With continuous evaluation and feedback loops, the webinar series will remain responsive to the needs of its members and ensure long-term success.

Evaluation and Results:

The success of this methodology will be assessed through the following metrics:

Attendance Rates: Track webinar registrations and live attendance to evaluate the effectiveness of marketing strategies.

Following the discussion at LTC in 2023, we restructured the committee and resumed offering webinars to our members. Between August and December 2023, we successfully hosted five webinars. Building on that momentum, we held 10 webinars in 2024. However, we did not host webinars in April or September 2024 due to the high number of HFMA conferences during those months. We've finalized the 2025 webinar calendar and are excited to expand our offerings while increasing attendance.

Engagement Levels: Measure attendee participation in Q&A, polls, and discussions to assess the interactivity of each session.

Since resuming the webinars, our engagement levels have improved and remained consistent. We've also seen a significant increase in participation during the Q&A sessions.

Member Satisfaction: Gather post-webinar surveys to assess the perceived value of each session, including content quality and overall engagement.

We've been receiving excellent feedback on each webinar, with the majority of responses being highly positive. Attendees have also shared suggestions for additional sessions they'd like to see in the future. We will continue to monitor this feedback to enhance the committee's efforts and ensure we provide high-quality educational webinars from our Region 4 committee.

Chapter Satisfaction: Collect feedback from chapters on the ease of hosting, the clarity of roles, and the level of support provided.

By following this structured methodology, the Region 4 webinar series will become more consistent, engaging, and collaborative, ensuring that each chapter plays an active role in contributing to the overall success of the webinar program.

Region Name: Regions 10 & 11

Submission Type: Multi-Region

Award Title: HFMA Western Region Symposium RFP Steering Committee

Submission Summary: HFMA Regions 10 and 11 revamped the Western Region Symposium's event management through a transparent RFP process. A new Steering Committee assessed needs, evaluated vendors, and selected a new partner to enhance service, efficiency, and cost-effectiveness, ensuring WRS remains a high-value event.

hfma

Needs Identification:

HFMA Regions 10 and 11 partner to bring together one of the largest regional HFMA events in the country called The Western Region Symposium (WRS). WRS is led by volunteers from the 14 chapters whose roles change annually, which makes the reliance on an excellent event management company imperative. The event management's role is to support the efforts of ensuring that the HFMA Western Region Symposium is an in-person event that provides excellent educational and networking opportunities for all attendees.

Because this event is also a major source of income for the chapters in the regions, it is critical to have an event management partner that the regions can rely on to provide timely, innovative insights so that we can continuously improve the Western Region Symposium and bring more attendance, which ultimately drives more revenue to the chapters.

30-days after every WRS event, a post-event wrap up call is held where the 14 Core Committee Members, 14 Chapter Presidents, Regional Executives from Regions 10/11, and the Event Management company discuss outcomes from the event. Feedback, gathered through this meeting, showed that there were concerns about the quality of service with the existing management company, including:

•Support for new sponsorship ideas

•Challenges with coordinating the Executive Connection (1:1 business meetings) Sessions

•Lack of Marketing Efforts

•Timely response to important communications

•Speed of reconciliation

The current Event Management Company contract had also been in place for 5 years and it was recommended by HFMA HQ that we evaluate our event management company on a regular, more frequent basis. Thus, based on feedback from the core committee and direction from HFMA, it was decided that the two regions would do an RFP to evaluate the existing management company against others in the industry, to remedy the concerns outlined above and make sure the WRS event remains a valuable event for all.

Goals and Objectives:

Region 10 and 11 needed to find a method to fairly evaluate the event management services we currently receive and compare them to other companies in the industry. We wanted to create a repeatable process that ensures our regions are opening an Event Management Request for Proposal (RFP) on a regular basis. This continuous evaluation and market exploration project will give our Chapters the opportunity to review our current service and understand if there are other event management that may better fit our region's needs, while staying within our budget. When this goal is achieved, chapters will have a transparent review and decision-making process to know they are paying the right amount for the service they expect and will continue to have an excellent WRS event with the best event management service for our regional event.

Objectives –

To ensure that our goals for this project were met, the Regional Executives and Western Region Symposium Treasurer identified the following objectives:

A Western Region Symposium Steering Committee, comprised of elected members from both regions, was created to oversee the comprehensive development and execution of RFPs for event contracting and support services for the WRS.

•The WRS Steering Committee created a formal contract which was presented to and voted on by the chapter Presidents that outlined the expectations of the WRS Steering Committee. (SEE ATTACHED BIPARTITE AGREEMENT)

•The WRS Steering Committee facilitated the creation and management of Request for Proposals (RFP) for event-related services, with a start date for the year 2027.

•This committee ensured a transparent, fair, and efficient process for reviewing and selecting an event management company for the WRS.

•An ongoing timeline for the RFP process was identified as occurring every three years for the contract, which will last 5 years, which maintains a cyclical schedule to address the evolving needs of the WRS and enhances the overall planning and execution of future events. This best practice was recommended by the team at HFMA HQ.

•The committee worked collaboratively to identify the needs of HFMA WRS events, solicit proposals from qualified vendors, and ultimately recommend the selection of event management company to the HFMA Regions 10 and 11 Presidents for their final decision.

•All Chapter Presidents were invited to listen to virtual presentations and had the final vote regarding which event management company to move forward with.

Methodology:

The WRS Steering Committee consisted of five volunteers, which consisted of the Regional Executives from both regions 10 and 11, Western Region Symposium (WRS) Treasurer and Presidents-Elects of the chapters that will lead the WRS in the first year of the new event management contract term, which were New Mexico and Hawaii.

Beginning in February 2024 through January 2025, these volunteers of the WRS Steering Committee met monthly for an hour to review the items below – a total of 12 hours. Outside of these standing meeting times, the hours put into each area are described below.

1.Needs Assessment: Conducted a thorough analysis of the requirements for the WRS events, considering logistical, technical, and budgetary aspects. This analysis took an additional 2 hours.

2.RFP Development: Developed a detailed and comprehensive RFP that clearly articulated the requirements, evaluation criteria, and expectations for potential vendors. (SEE RFP ATTACHED). This took the committee and additional 2 hours

3.Vendor Outreach: Disseminated RFP the to a broad pool of qualified vendors through appropriate channels, ensuring a diverse range of proposals. This included promoting the RFP on Region 10/11 websites and each of the chapters sharing the RFP with event management companies they may use. HFMA HQ also shared the RFP with companies. (SEE INVITATION ATTACHED). This took the committee members an additional hour to get the event on the website and promote to the chapters.

4.Proposal Evaluation: Established a fair and transparent process for evaluating proposals, including the formation of an evaluation team, scoring criteria, and interview processes if necessary. Chapter Presidents were invited to attend the virtual presentations and a shared community "WRS" page was created where Chapter Presidents could review proposal and view recorded finalist interviews. Most of the volunteer time was spent doing this section, which included each committee member reviewing each of the five proposals, interviews, reference checks and summarizing finds. This took each of the committee volunteers an additional 5 hours for a total of 25 hours. (SEE EVALUATION CRITERIA ATTACHED & COMMUNITY PAGE)

5.Recommendation: Based on the evaluation, the steering committee recommend the selection of event management services to the HFMA Regions 10 and 11 Presidents for their final decision. The committee put together a summary of the recommendation on a PowerPoint and then presented to the regions, this took an additional 4 total hours. (SEE RECOMMENDATION POWERPOINT ATTACHED)

6.Contract Negotiation: Assist in negotiations with selected vendors to ensure alignment with HFMA WRS goals, compliance with regulations, and fair terms. This took 4 hours between additional meetings and review time.

7.Communication: Kept HFMA Regions 10 and 11 Presidents and the WRS stakeholders informed about the progress of the RFP process, ensuring transparency and accountability. This took an additional 8 hours.

Total time spent by the steering committee and Presidents/President-Elects who were involved in voting and regional discussions was 58 hours throughout the 12-month period.

Evaluation and Results:

The WRS Steering Committee received five proposals from event management companies to our RFP and we conducted four interviews with qualified companies.

The Steering Committee checked references and scored the four finalists based on the criteria outlined in the Scoring Sheet (ATTACHED).

Throughout the process, we found that the RFP timing and pricing were the biggest deal breakers for us. Since we had two remaining years on our hotel contract with the incumbent event management company, we were doing an RFP in 2024 for an event that wouldn't take place until 2028, with planning beginning in 2027. We needed to do an RFP this far in advance for hotel contracting. This was too far in advance for one of the finalists, so they elected to withdraw their proposal.

The three remaining finalists included: 1 – our incumbent, 2 – a similarly priced company and 3 – a company that was 4X as expensive. And while this 3rd, expensive option would have taken us to the next level for event marketing and design, it was not fiscally responsible to provide them as a final option since a goal of our WRS event is to ensure revenue gets back to our chapters.

Related to pricing as well, we learned that there were services that can be provided by OneHFMA, which chapters are already paying for. Having this support saves chapters money because the event management company isn't billing time for those tasks. These things include:

•Creating the survey/application for our Executive Connections

•Creating the event website for sponsorship

•Setup up and management of the registration system

•Gathering post-event evaluations and feedback as well as CPE certificates.

After multiple meetings and discussions between the Steering Committee, Chapter Presidents and President-Elects, the Presidents voted to move forward with a different event management company than was currently contracted. This was based on service offerings, value/price, and ability to resolve some of the identified concerns outlined in the Needs Identification section.

Additional Learnings

A difficult part of this process occurred when we notified the incumbent company of our decision. They decided to immediately invoke the 18-month contract cancellation clause and informed us that they would prefer to cancel even earlier and have WRS move to the newly selected company as early as 2026. They also informed us that they would be keeping the hotel commission fees that they had negotiated, which we learned is a standard practice.

Because of this, we have put stronger language into our contract with the new event management company and had HFMA HQ review our final contract before signing to make sure we aren't missing any important elements. We now have a 90-day cancellation clause in our contract.

The final result is that Regions 10 and 11 feel confident that they are aligned with an event management company that will address their current needs while working with them to improve and strengthen the education, networking and value of the Western Region Symposium.