



OREGON HFMA

FINAL

STRATEGIC PLAN 2012-2013

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Strategic Plan – 2012-2013

Executive Summary

The Oregon Chapter of Healthcare Financial Management Association (“HFMA”) will serve members by presenting quality education, providing opportunities for interaction with peers, and increasing the potential pool of leaders in healthcare finance.

Our main areas of focus under this plan include:

- Quality Educational Programs
- Member Recruitment, Involvement, and Retention
- Leadership Succession
- Communication
- Certification Support
- Networking Opportunities
- Environment-Friendly Initiatives

We will continue to have monthly conference calls attended by Officers, Board members, Program committees and other interested committee chairs to develop program content and approve financial arrangements with speakers. We will continue to identify new subject matters for programs and strive to offer educational opportunities for healthcare staff and meet member needs.

We will explore various ways to improve Chapter communications using our website, newsletter, social media/networking and verbal communications at quarterly meetings.

We will survey our members formally and informally to ascertain their educational needs as well as other needs. We will actively use these surveys in planning our education programs.

We commit to recognizing chapter members for the time and effort they give to the chapter. We will encourage new members to get involved on chapter committees, and encourage established members to become committee chairs and board members.

We will continue to monitor and evaluate the required terms for members to become eligible for leadership positions including officers.

I. Chapter Foundation

A. Vision of the Chapter’s Future

The Chapter is the leading resource for finance professionals in Oregon and Southwest Washington hospitals and the healthcare community. Finance professionals in healthcare include CFO’s, directors of finance, accountants, financial analysts, reimbursement and managed care professionals, revenue cycle directors/managers and staff, and related professionals.

B. Chapter Mission

It is our mission to assist our members and other finance-related healthcare professionals in excelling in their positions, thereby improving the business performance of organizations operating in or serving the healthcare industry, through Chapter collaboration with HFMA National and through our commitment to member service.

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C. Chapter Values

1. Member service is our highest priority.
2. Excellence is our common standard.
3. Teamwork is critical.
4. Individual member involvement is vital.
5. Individual members shall be treated with respect, honesty, dignity, and fairness.
6. Integrity is fundamental to all that we do.
7. Innovation and creativity must be promoted.
8. Chapter fiscal affairs shall be conducted prudently.

II. Environmental Assessment

A. External Assessment

1. Assessment of Member and Customer Needs

The greatest need of our members is education that will meet their diverse requirements. The rapid change in healthcare nationally and in local markets, combined with the increasingly diverse roles of financial management professionals, is broadening the educational needs of members.

Based on the January 2012 member survey, members ranked seven items that are important in **improving our chapter** (listed in descending order by importance):

- Topics addressed at educational programs
- Speakers used at educational programs
- Location of chapter programs
- Networking Opportunities
- Coverage of state and regional issues
- Web site
- Member communication (e.g. newsletter)

The member survey, which is completed annually, also assessed the **level of interest in national program topics** and these are listed in descending order of interest.

- Healthcare reform
- Changes in Medicare reimbursement policies
- New technologies in finance, revenue cycle and clinical-financial integration
- Leadership skills
- Managing productivity and costs
- Bundled payment reimbursement methodologies
- Accounting and financial reporting
- Compliance with Medicare regulations
- Growing self-pay component of healthcare

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In addition, topics of **local interest for programs** were ranked (listed in descending order):

- Trends and outlook for local healthcare industry
- Local payers and employers response to healthcare reform
- State legislative and regulatory update
- Using benchmark data
- Payor and provider collaboration
- Strategic planning, business plans and service line planning
- Trends in commercial payment
- Benchmarking managed care contract performance
- State Medicaid program
- Fiscal Intermediary/Medicare Administrative Contractor Reimbursement update

2. Social, Political, Technologic Environment

Rapid and diverse change dramatically affects individuals and organizations within the healthcare industry. This upheaval in the environment can be summarized as follows:

- Changes in the delivery system structure – mergers, buy-outs, alliances, integration, expansion
- Changes in regulation and statutes – health care reform, legal rulings, liability lawsuits, compliance
- Changes in technology – communication links, medical science, information systems
- Changes in opportunities – new competitors, new markets, niche markets, price pressure
- Changes in payment systems – hospital provider tax issues, Medicaid and Medicare reductions, pricing transparency
- Pressure to reduce expense while maintaining quality - narrowing margins
- Difficulty in accessing capital

The pace and scope of change in Oregon is compounded by cost pressures, premium increases and continuing change in the payor landscape. In addition, the State of Oregon’s fiscal and economic problems, which member hospitals feel in terms of reduced Medicaid reimbursement, increasing numbers of uninsured, increasing patient copays and deductibles, and the Oregon Hospital Provider Tax, and an increasing demand for pricing transparency from payors and providers all contribute to the dramatic increase in financial pressures for the Oregon healthcare market.

B. Internal Assessment

1. Chapter Strengths and Weaknesses

The Chapter has many strengths to be proud of:

- Highly rated educational programs
- Financial stability with healthy reserves
- Exceptionally strong financial support from sponsors
- Many active committees that provide opportunities for member involvement and input
- Communications with monthly conference calls for Programs
- Educational program topics focused on member needs
- Strong chapter support for certification
- Numerous networking opportunities that are valued by members
- Continuing strong pool of candidates to serve as officers and directors
- Contribution to the success of the Region XI Symposium

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The Chapter has some weaknesses:

- Many members do not attend any meetings
- Low percentage of members participate on chapter committees
- Low participation by Past Presidents
- Opportunities exist for improving chapter communications

2. *Chapter Service Performance*

A need to respond to external environment changes continues to guide the Oregon chapter of HFMA. There is recognition of:

- Continuing focus on member needs at the state and local level taking precedence over national issues
- Growing emphasis on matching educational offerings to the topical needs of members

The local member focus is most notable in the educational programming on topics specific to our region. Member surveys and membership growth continue to indicate chapter quality and membership levels have been maintained or improved.

A corresponding shift is occurring at the national HFMA level. The Davis Chapter Management System (DCMS) encourages both improvement and maintenance of high quality services to members. DCMS encourages chapters to use a variety of management practices to achieve individual goals of quality and growth while still fulfilling the minimum requirements for chartered chapters.

3. *Chapter Quality*

The quality of chapter activities will be actively monitored through the review of membership surveys, program evaluations and suggestions from members. The Chapter Board of Directors reviews each of these items as they are completed and become available during quarterly board meetings. The Oregon chapter overall member satisfaction ratings on the national HFMA survey continue to improve. The January 2011 membership survey indicated 65% of members surveyed were “very or extremely satisfied” compared to 57.1% in the previous survey. The next survey is scheduled for January 2012.

4. *Chapter Growth*

Changes both externally and internally have resulted in five significant trends within the membership of Oregon HFMA which have continued over the last few years.

- Substantially less time for members to devote to volunteer staffed-organizations like HFMA
- Curtailment of financial resources for travel committed by some employers to HFMA
- Greater member need for current information and “how-to’s” regarding the numerous changes that directly affect them in their responsibilities
- Member desire for quick access to resources for researching, planning and implementing new finance and insurance-related products and services as managers take on new roles
- Relatively stable membership

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When planning the strategic direction for the Oregon Chapter, these trends indicate four areas of focus to consider:

- Respond to member resource constraints by increasing the value of membership.
- Take advantage of the chapter's strong balance sheet to be innovative with program planning costs, to try to increase the value of programs and topics and foster greater attendance and participation.
- Meet the growing need for specific "how-to's" and quick access to information through focused educational and related networking opportunities and by leveraging the skills of chapter members through panel discussion programs and other methods such as workshops.
- Increase education focus on state and national regulatory issues, professional services and overall revenue cycle (i.e. front end functionality) that directly impact our members.

III. Chapter Goals and Objectives

A. Goals for Services to Members and Leadership

Goal: Provide education that meets the diverse needs of members.

Objective: Determine program content using membership preferences and exploring specialized workshops or tracks.

Strategy: Use information on **membership interests** from the annual National survey and from quarterly meeting program evaluations as programs are developed for FY 2012-13.

Objective: Structure program development to ensure topic appropriateness and speaker quality.

Strategy: President-Elect to preside over **monthly conference calls** with Program chairs, co-chairs, Board members and other interested committee chairs to assist with program planning, provide input into sessions, and keep chairs informed of related Board discussions and policies. The President-Elect will **approve financial arrangements** with speakers in advance of speaker commitment. Goal will be to have the agenda and registration launched a minimum of SEVEN (7) weeks prior to meeting.

Objective: Continue to encourage and support certification of chapter leaders and members.

Strategy: Provide financial support for certification at appropriate level as approved in the annual budget. Continue to provide exam preparation sessions, such as the professional practicums started in early 2011. Continue to monitor percentage of membership and percentage of leadership certified. Celebrate certification success by announcing newly certified members at the opening of each chapter meeting, as well as at Board meetings and in the chapter newsletter, and presenting them with "I'm Certified" pins.

Goal: Continually improve communication to members.

Objective: Keep members informed about Chapter planning and information.

Strategy: President or another chapter leader to open each quarterly meeting with **briefing on chapter activities**, highlights from previous day's board meeting, social event, recently certified members, regional presidents meeting highlights, introduction of new members, etc. The President will prepare **written updates** in the Pipeline (Oregon Chapter newsletter).

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Objective: Increase officer, board member and general membership knowledge of policies and procedures. Make efforts to more formally organize and communicate official chapter policies/procedures and leadership training/transition.

Strategy: Continue the development of the Chapter **policy manual** summarizing policies and procedures for the Chapter, and update as needed to incorporate any policy changes approved in future Board meetings. Continue to provide volunteers support/time to ensure transitional knowledge shared among chair and co-chair roles for succession planning.

Objective: Leverage current technology to provide information and maintain connections with members through a variety of communication methods.

Strategy: Establish and update Facebook, Twitter, and Linked-In accounts for the Oregon chapter, and attempt to grow the number of “followers”. Maintain chapter website and keep it up to date. The Communications Chair will oversee these accounts. Continue to publish a minimum of four newsletters annually, and enhance with articles of local/chapter interest.

B. Goals for Chapter Growth

Goal: Build member involvement by increasing the value of active membership in Oregon HFMA.

Objective: Develop effective **orientation for new members**.

Strategy: President and Officers/Board members to greet and welcome new members at meetings and sit with new members at lunch/breakfast when they attend meeting. New members will be identified by designated New Member flags and before each conference, Membership chair & co-chair will obtain list of new members who are registered to partner them with established chapter member as a mentor. New member will receive leadership organizational chart of committees/responsibilities for possible interest to volunteer. Mentor will escort and introduce new member at committee of interest and check-in throughout conference. Membership chair and/or co-chair will follow-up with new member after the conference to obtain feedback/opportunities for future improvement/experience.

Objective: Encourage active Chapter participation on committees and improve recognition of volunteer time and effort, including Region 11.

Strategy: Profile committees and Board members in the Pipeline. **Highlight volunteer efforts** in the President’s message. Officers and Board members bring to Board meetings examples of member efforts appropriate for President’s recognition. Determine means to solicit volunteer interest to grow the list of potential co-chair candidates. Recruit more members to serve as committee members. Increase Oregon Chapter representation, including two past presidents who will reside on Region 11 CORE.

Objective: Determine ways to increase **opportunities for new and existing** members to network and participate in the chapter.

Strategy: Consider interactive events during Social Hours at two of the four meetings to engage members in meeting and getting to know each other. Invite new and existing members to “follow us” on social networking sites.

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Objective: Evaluate current **leadership structure** with the Oregon Chapter for maximum potential of involvement.

Strategy: Evaluate new Treasurer role which was changed for 2010-11, and is no longer part of the Officer requirement, need to ensure organizational structure meets the needs of our chapter.

Objective: Determine ways to increase green or environmentally friendly procedures and initiatives in efforts of reducing global footprint.

Strategy: Evaluate current protocol where able to reduce waste: encourage speakers to post PowerPoint/program handouts online versus making copies, continue to post newsletter online rather than in print, give consideration to “green” facilities/hotels when possible, reduce size of leadership handbook by posting documents online, reduce size of member directory in conjunction with changes to national requirements.

IV. Planning and Data Gathering Process

The full Board acts as the Strategic Planning Committee.

This Strategic Plan is based on the member survey results, quarterly meeting evaluations, registration, observation and discussion among board members and other chapter leaders.