



HFMA Nebraska Chapter Strategic Plan 2016 - 2018

*Prepared by the Chapter Officers, Board of Directors, and
Committee Chairs for the Fiscal Year beginning June 1, 2015*



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Chapter Leaders

Officers

President	Dan Schonlau
President-Elect	Joe Harnisch
Vice President	Rebekah Mussman
Secretary	Andy Kloeckner
Treasurer	Louis Hoffman

Board of Directors

- David J. Burd (ex-officio)
- Troy Bruntz (Past President)
- Erik Carlson (2nd term / 1st year)
- Sean Wolfe (2nd term / 1st year)
- Jess Paisley (1st term / 1st year)
- Rick Rogers (1st term / 2nd year)
- Renee Fink (1st term, 2nd year)

Committee Chairs

Awards / Social / Publicity	Rick Rogers
Bylaws	Whitney West
Certification	Brian Green and Randy Hoffman
Collaboration	Joe Harnisch
DCMS	Andrew Kloeckner
Financial Review	Michelle Ambridge
Founders/CEU	Kim Hixson
Generations	Jess Paisley
LINK	David Burd
Membership	Whitney West and Renee Fink
Newsletter	Sean Wolfe and Shelly Soupier
Nominating	Troy Bruntz
Policies and Procedures	Whitney West
Programming	Rebekah Mussman and Andrew Kloeckner
Sponsorship	Jill McClure
Strategic Planning	Cindy Cherry and Bryce Betke
Website/Technology	Erik Carlson
Yerger	Joe Harnisch



Executive Summary

Overview

The Nebraska Chapter of HFMA will continue our mission to promote education and professional development of our members. Our Chapter's highest priority is service to our members and **sustained excellence in performance**.

Our future goals of the Chapter incorporate a balanced approach in our service to our members and the development of Chapter goals through five foundational elements: Education, Networking, Collaboration, Membership/Professional Development, and Finance. The plan applies specific goals and targets to each committee chair for attainment of those goals and implements a long-term focused marketing campaign to ensure progress is maintained.

This strategic plan outlines the framework in which the Nebraska Chapter officers, Board of Directors, and the committee chairs will operate for the upcoming fiscal year and beyond. The strategic plan that follows this executive summary outlines our mission and vision as well as our core Chapter values and our balanced approach to the future.

Chapter Mission

The mission of the Nebraska Chapter of HFMA is to promote education and professional development of our members and other healthcare professionals through ongoing educational opportunities. The following underlying core principles support our mission statement:

- Provide professional development through educational sessions offered to our members and other healthcare professionals.
- Promote professional development through certification opportunities and leadership development through active participation in Chapter leadership roles and peer interaction.
- Encourage our members and guests to interact at all Chapter social events in order to promote networking and communications.
- Promote and maintain professional and ethical standards of conduct.
- Influence health policy decisions, practices and principles, through dissemination of information and advocacy by the Chapter membership and other health care professionals.

Chapter Vision

To strengthen our position as the leading professional organization in Nebraska for individuals seeking education, professional development, networking and access to current information affecting the financial management of healthcare organizations.



Core Chapter Values

The Chapter has identified core values, which ensure that our strategic direction is in line with the ideals espoused by our profession as well as those that lead our national programs. These include:

- **Excellence:** We will continuously strive to offer the highest quality educational programs and events to our members and guests.
- **Integrity:** The Chapter will demonstrate and promote honesty, truthfulness, sincerity, trustworthiness and fairness; sticking to self-imposed high standards of ethics, principles and work quality in all Chapter affairs.
- **Respect:** The Chapter will promote and maintain respect, dignity and fairness for all individuals. As our membership becomes more diverse, we must foster an environment of professional respect.
- **Responsibility:** The Chapter's programs will be based on sound financial principles in accordance with our annual budget.
- **Service:** Our highest priority is service to our members, by offering educational sessions to meet their professional development needs.
- **Teamwork:** We will encourage participation by our members in Chapter leadership roles. Active participation is vital to our Chapter's relevancy and long-term success.
- **Innovation:** The Chapter will encourage new ideas from the officers, board members and chapter members. As a Chapter we believe in being attentive to new opportunities and valuing creative solutions that will promote education and professional development.



Environmental Assessment

I. Chapter Assessment

Healthcare industry issues at both the national and local level have affected every aspect of the Nebraska Chapter. These factors have directly impacted member enrollment as well as member involvement in Chapter activities. The impact of these factors includes:

- The Nebraska Chapter experienced growth in membership in the current year and prior year (FY15 and 14) while the prior years' trend in membership growth had been fairly steady.
- The Chapter has seen very minimal change in average years in HFMA (11 years in FY 14 and FY13); average years in healthcare (20 years in FY14 and FY13); and average age (48 in FY14 and 47 in FY13).
- Geographical diversity in membership (FY13 45% rural/55% urban) creates challenges in educational programming.
- The Nebraska Chapter has one of the highest percentages of Certified/Fellow members nationally at 18.5% in FY15.
- The long-term commitment of the Chapter members is evident by Founder's Award winners with 72 bronze , 49 silver, 32 gold, and 4 (1%) medal of honor.
- The number of educational offerings and networking opportunities has remained constant over the past several years, achieving the platinum in FY 14 and FY 13 and the gold level in FY12. The Chapter was awarded the Robert M. Shelton Award for Sustained Chapter Excellence in June 2010 from National HFMA, demonstrating sustained excellence to its members over a five-year period.

HFMA Chapter Survey Report

Members of the Nebraska Chapter participated in the recent Chapter survey report conducted by the national HFMA office. The results are based on a scoring system of 0=Dissatisfied, 1=Neutral, 2=Satisfied, 4=Very Satisfied, 5=Extremely Satisfied. The 2015 survey included responses from 91 total statewide members for a 33% response rate. The response rate for 2014 was 32%.

The Chapter members satisfaction score of high was 84% with the HFMA Nebraska Chapter overall, compared to 69% from all regional and national Chapters participating in the survey. In the eight broad categories measured, Chapter members were more satisfied compared to the regional and national counterparts in all categories. Areas of strength include Educational Topics and Programs and the Chapter Newsletter.

In the area of opportunities for improvement, a total of seven factors were measured. Areas with opportunities to improve included topics addressed at educational programs, location of Chapter programs, chapter networking and chapter website. Our chapter membership mirrors the response of the national HFMA membership with topics addressed at chapter programs and location of chapter programs being the areas of the most importance. All areas of opportunity are addressed in the chapter and committee goals.

The major topics of interest to the members that responded to the survey included; emerging provider payment and delivery models, trends and outlook for local healthcare industry, state legislative and regulatory update, State Medicaid program and fiscal intermediary/Medicare administrative Contractor reimbursement update. The continued transition to value based care drives these areas of interest and will continue to be topics for education for the chapter.



II. External Assessment

Governmental Regulations

- Healthcare financial professionals are required to possess and maintain a broad understanding of regulatory and operational issues affecting all sectors of healthcare. With an increasing demand and complexities of these issues, a burden is placed on healthcare professionals to lead their organizations to compliance with related mandates. Healthcare professional organizations are likewise challenged to meet the increased demand of their membership for up-to-date education and tools.
- With the Healthcare Reform changes taking place, it will continue to become increasingly important to stay in tune with the changes as they occur and to provide updates and education to the members on these changes.
- Challenges to the Healthcare Reform law will have significant impact on the healthcare environment.

Membership

- An increased need for broadened educational offerings will include a demand for more programs on general management and leadership skill development, other non-financial topics, and topics that may reflect the relevance of the many components of the organization that contribute to successful financial performance.
- The chapter must be responsive to the diverse programming needs of hospital-based members who work in various settings: urban, rural, teaching, rehabilitation, home care, skilled nursing facilities, physician clinics, third party payers, etc.
- The shift to cost-based reimbursement and prospective payment reimbursement has caused a huge gap between the CAH hospitals and PPS hospitals. The chapter must provide additional uniquely targeted programming for both categories.
- The Nebraska HFMA Chapter is a state-wide Chapter. The distance across our state is 500 miles. The Chapter must be proactive in utilizing web-based programming and rotating programming opportunities throughout the state to meet the needs our membership.

Technology

- Technology allows us to bring cost-effective programming to our members' facilities. Web-based or teleconference formats enables members to share programming opportunities with fellow staff at a low cost without the added costs of travel time and expense. The technology also allows us to provide additional educational opportunities to our remotely located members, members with limited time to be out of the office, multiple attendees from facilities, etc.
- This same technology also increases the competition to provide education to our members, as our members are more accessible to other regional and national organizations via the internet and videoconferencing.

Healthcare Industry

- Hospitals trending to form networks and affiliations along with acquiring physician practices and buying or creating health plans.
- Increasing pressure to reduce cost as volume declines.
- Transition of reimbursement from volume to value based healthcare and health plan redesign.
- Significant advances and investment in technology.
- The current economy continues to threaten the financial impact to healthcare organizations including cut backs in travel, education and membership, along with potential decreases in reimbursement from political legislation.

HFMA National

- National HFMA provides to our chapter a clear direction of the vision it has for the organization. As a chapter, we evaluated the national platform and prioritized those initiatives with the greatest benefit to our members in which we will invest our Chapter resources.



III. Internal Assessment

An internal assessment of our Chapter yielded the following conclusions:

Strengths

- Consistent, strong, motivated leadership
- Member participation/commitment of members
- Leading chapter for certified members
- Close group with opportunities for social interaction
- Hours per member are continuously very strong
- High member satisfaction
- Culture of success leading to national recognition
- Collaborative, diverse, integrated education
- Good succession planning
- Positive membership mix of providers and professionals

Weaknesses

- Geographic distant, large, one-chapter state
- Everyone is overworked/potential for volunteer burn-out
- Lack of urban/large system provider participation
- Costs for membership and educational events may limit attendance
- Stratification of larger, PPS hospitals vs. rural CAH, difficult to cater to needs of both
- Uninvolved members

Opportunities/Goals

- Use technology to reach more members (e.g. Telehealth network, digital, webinars)
- Customize education for urban members, focus on CFO's/Controllers
- Continue to collaborate with other HFMA chapters/organizations
- Continued collaboration with clinicians
- Work with Universities Finance and Health Administration Programs
- Utilize Omaha and Lincoln facilities
- More focus on physician practice management through webinars or break-out sessions
- Increase membership among entry and mid-level professionals
- Membership engagement/involvement
- Formalize/share administrative duties
- Build into younger members
- Focus on additional HFMA certifications

Threats

- Decline in membership due to less time and employers not paying dues/meeting fees
- Impact of industry environment on sponsors/memberships
- Hospital consolidation/outsourcing resulting in less membership
- Time constraints, higher performance demands on a volunteer leadership group
- Attracting younger members
- Competition from other professional organizations
- Financial concerns and lower reimbursement



Essential Issues – Balanced Approach

The Chapter leadership determined that even with the exceptional programs it offered the Chapter needed to maintain a focused, measurable, understandable and long-term approach to addressing the concerns of our members and to **sustaining excellence**. The Chapter Strategic Planning Committee facilitates the yearly assessment of the current strategic planning process included a review and revalidation of the Chapter's mission, vision and value statements, along with a complete review of Chapter member survey.

Through this assessment, the key "pillars" our members and their leaders valued are revalidated. These foundational pillars are identified and defined as follows:

- **Collaboration:** The Nebraska Chapter of HFMA will endeavor to engage and influence the larger community by using our resources to address community needs; sharing our knowledge, expertise and viewpoints to influence regulation and legislation; and always seeking to identify and achieve the greater public good.
- **Education:** The Nebraska Chapter of the HFMA will expand its current education programs by developing new ways to reach our urban members, rural members, and PFS members developing new services and products which meet the needs of our members, and developing new member segments that facilitate the identification of education needs.
- **Finance:** The Nebraska Chapter of HFMA will operate the chapter activities in a fiscally sound manner according to the direction of the Board of Directors.
- **Membership/Professional Development:** The Nebraska Chapter of HFMA will value the commitment of our members and promote professional development opportunities for our members through the use of certification programs, focused mentoring programs, and leadership development opportunities within the Chapter.
- **Networking:** The Nebraska Chapter of HFMA will leverage the professional and corporate membership of the Chapter to encourage interaction, enhance personal and professional relationships, and improve communication between the financial and business managers of the healthcare institutions within our state.

The pillars represent the areas measured on the chapter's balanced scorecard. The measurements include the national metrics and chapter specific initiative tracking. The measurement benchmarks are set based on the DCMS award levels, national/regional benchmarks and our past chapter performance.



2016 – 2018 Strategic Initiatives

The goal with this process was the validation of the Chapter's mission, vision and values. An intermediate goal was the development of a balanced approach in determining and prioritizing the Chapter's long-term initiatives to ensure our resources are appropriately utilized where the membership will respond to our observed opportunities in participation in education programs and member recruitment/retention. The identification and implementation of short-term strategic initiatives assists the Chapter in obtaining its' long-term goals and objectives. The Chapter's short-term strategic initiatives are as follows:

Collaboration – engage and influence the larger community:

1. Expand regional collaborative relationships with key healthcare associations (e.g. BRVN, AAHAM, NHIMA, NONL, MGMA, Nebraska Healthcare Marketers, Nebraska Hospital Association and western HFMA chapters).
2. Utilize chapter expertise and influence to support healthcare advocacy efforts.

Education – provide timely, quality, cost-effective, relevant education programs:

1. Achieve the Platinum award for educational performance improvement.
2. Encourage and promote use of technological options.
3. Be prepared to quickly address industry changes and provide consumer education/training.
4. Continue to promote and support the annual Region 8 Conference.
5. Continue using member facilities as educational sites.

Finance – operate chapter activities in fiscally sound manner:

1. Ensure break-even annual budget (including education programs).
2. Maintain focus on sponsorship value.
3. Evaluate financial performance of each event.
4. Evaluate efficient and secure banking opportunities.

Membership/Professional Development – promote professional development opportunities:

1. Recruit and retain members.
2. Broaden membership involvement (e.g. urban providers, physicians, students and payers).
3. Provide and communicate measurable member and organization value and satisfaction.
4. Strengthen succession planning for committees.
5. Promote all types of certification through providing tools and support to members.

Networking – encourage interaction to enhance personal and professional relationships:

1. Enhance the process for content distribution through social networking sites.
2. Keep senior leaders engaged in chapter activities.
3. Test new models of social/educational networking.



2015- 2016 Operational Goals and Objectives

The Chapter's operational goals and objectives, which will be used as the foundation of accomplishing our strategic initiatives, are contained in a separate document. Each committee and officer will be responsible for creating a succession planning document and supporting materials to be posted to the website.