

**MONTANA CHAPTER
HEALTHCARE FINANCIAL
MANAGEMENT ASSOCIATION**

**MULTI-YEAR PLAN FOR
SERVICE, QUALITY & GROWTH**

6/1/07 - 5/31/10

*Prepared by the Montana Chapter
Board of Directors*

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CHAPTER FOUNDATION

I. CHAPTER'S VISION

The Montana Chapter of Healthcare Financial Management Association (HFMA) will strive to define, realize and advance the financial management of healthcare by helping members and others improve the business performance of healthcare organizations. We also strive to be the leading professional resource for healthcare financial managers in Montana.

II. CHAPTER'S MISSION

The Montana Chapter of HFMA is a professional member organization for individuals involved in healthcare financial management. The Montana Chapter of HFMA services and represents members by:

1. Providing professional development through education, information, certification, peer interaction, and leadership training.
2. Influencing healthcare financial management and patient financial services policies, principles, and practices through advocacy and dissemination of information.
3. Promoting the highest standards of professional and ethical conduct.
4. Promoting diversity by actively seeking members from alternative, non-hospital related entities.
5. Interacting and co-sponsoring events with other related professional organizations in the health care industry.
6. Leading members and other finance related healthcare professionals to excel, thereby improving the business performance of organizations operating in or serving the healthcare industry in Montana.
7. Encouraging participation amongst all levels of staff involved in healthcare finance, especially Directors and CFOs.

III. CHAPTER'S VALUES

1. Service to our members is the highest priority.
2. We strive for excellence in all we do.
3. Peer interaction, networking and teamwork will be fostered. Teamwork is essential in meeting the objectives of HFMA.
4. We believe in the importance of individuals.
5. Creativity and innovation is encouraged.
6. We believe in conducting HFMA with financial responsibility and a prudent approach to business.
7. Future leadership must be developed.

IV. ENVIRONMENTAL ASSESSMENT

1. External Assessment

A. Assessment of Member and Customer Needs

Through participation in the National HFMA survey of our members, the Montana Chapter of HFMA will be able to review and consider the educational needs of the membership. The survey results are a basic tool for use in planning the Spring and Fall conferences. The education events continue to enjoy member support.

Chapter growth and member retention for the last several years is related to the Chapter's education goals. Namely, providing education opportunities that are timely, cost effective and relative to our members professional growth and development. It is important that we plan programs with an offering of solid topics, and at least one keynote speaker with general appeal for all attendees.

We expect our Chapter growth to level off, causing the Chapter to focus on diversification and member retention activities.

B. Environmental Assessment

The impact of BIPA, HIPAA and APC's on the industry is very evident. Many Montana Hospitals have become Critical Access Hospitals (CAHs), and we are experiencing an increase in specialty hospitals around the State. Health care professionals now, more than ever, turn towards professional education to meet the demands of the industry. Bioterrorism, growing numbers of uninsured Montanans and the rising cost of technology each pose new threats and challenges for health care professionals.

The Montana Chapter of HFMA is proud of the fact that we have provided educational opportunities for our members and those from other professional organizations, including concurrent sessions focusing specifically on CAHs.

The fast-paced changes in the Medicare prospective payment system for outpatient services has increased the value of timely educational events and their importance. These ongoing changes to the APC reimbursement system, the struggles in implementing HIPAA regulations, and the looming changes in the Medicare system for pharmacy coverage pose considerable challenges for healthcare systems. Changes to inpatient DRGs and demands for pricing transparency and consumer driven healthcare will be shaping the future of our business and will be focused topics in the coming years.

2. Internal Assessment

A. Chapter Service Performance

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Quality of Educational Workshops

The Montana Chapter is recognized as the primary education source for healthcare financial personnel in the state. The Chapter offers two three-day workshops that are reasonably priced, have timely information and are presented by high-quality speakers. The workshops are strategically located to provide convenient access for our geographically dispersed members.

Speaker and workshop evaluations have generally been positive, attendance is growing and new organizations seek to partner and co-sponsor our events. The recent member survey cited the Program/Educational topics as the primary factor to improve the Educational conferences. Areas of Compliance/legal issues and Regulatory updates, along with trends and outlook for the local

healthcare industry had the highest percent of members interested. We will target these areas in future conferences.

With the increased availability to videoconferencing throughout the State, the MT Chapter has supported several meetings with the MHA regarding HIPAA Standards & Transactions. We plan to continue using video and phone conferencing to bring our membership together more often in order to discuss pertinent topics. These conferences are well attended and provide useful information

-Networking: Peer to Peer Relationships

Networking related to Chapter educational conferences is among the most highly valued opportunities cited by members of the Montana Chapter in the recent National survey results. Forging new friendships and strengthening existing relationships help in solving problems and creating new ideas that help meet the challenges of the ever-changing health care industry. HFMA continues to strengthen its relationship with health information managers, who we believe represent a critical link in the hospital operational structure.

As the technology in healthcare races ahead clinically, it also has become a large consideration for the financial healthcare operations. Networking with our corporate sponsors/vendors is also extremely valuable for the membership.

- Membership

Membership continues to be a strength of the Chapter. The Montana chapter plans to concentrate on membership retention in the coming years. MT ended 2006 with 202 members, which was 1% growth in membership over the prior year. As of February 2007, the chapter had experienced a 3.5% decrease in membership – down to 195. Our goal over the coming years is to strive for membership of around 200 and to keep our member retention rate at least 87%.

- Corporate Sponsorships

In 1998, Montana HFMA created a Sponsorship Committee dedicated to seeking partnering opportunities with vendors and sponsors. The Committee continues to play a major role in chapter finance. Sponsor and vendor support has grown nearly every year and allows the Chapter to offer exceptional educational programs at very affordable costs. The Committee plans to continue to seek partnering opportunities in the coming year.

B. Chapter Quality

- Poor Committee Effectiveness

The Chapter identified the need to improve the effectiveness of the standing committees. Members cited a lack of communication among committee members and time constraints imposed on many of the Chapter volunteers. To strengthen Committee performance, the Board has adopted an LTC-like session for Committee chairs and Chapter leaders. To implement this goal, the Chapter moved its strategic planning meeting from June to February, freeing up the summer Board meeting for leadership development activities.

Montana Chapter education programming is facing the difficult challenge to provide relevant education to a diverse group of health care facilities. Montana HFMA seeks to balance its education program between large health system and small facility needs by offering topics targeted for CAHs.

The Chapter has experienced a weaker attendance of CFOs, and is challenged to provide programming with enough high-interest topics to meet their needs. We have competition nationally with several other organizations, holding large conferences. We are working to encourage participation among this group.

- **Geographic Dispersion**

Montana is typical of Western States. While occupying a considerable land mass, Montana has few people. Our members and our health facilities are widely separated geographically. Face-to-face interaction is relatively difficult and expensive, so monthly social interaction is not possible among our members. The Chapter will continue to offer two three-day meetings to provide networking and educational opportunity, and will explore the use of distance communication technology as noted above.

- **Development of Leadership**

The Montana Chapter needs to develop a system to identify future leaders of the organization. A process needs to be developed to get new members active in the organization as committee members and active volunteers as these individuals will become the chapter's future leadership. Mentoring by current board members of new members and of new board members is a key element in this process.

The Chapter has amended the by-laws to encourage additional members to participate on the Boards. Committee chairs are encouraged to invite new members to participate on Committees and to help with other Chapter activities. The Past-President is the chair of the Sponsorship Committee. We have also added another year to the Board for the Past-Past President to increase the continuity of leadership knowledge within the Board of Directors.

We've done a great job of encouraging chapter involvement through newsletter articles and by developing a Chapter Website.

V. CHAPTER GOALS AND OBJECTIVES

Goals for Service to Members

Education

Service Goals: To provide affordable high quality educational program to it's membership at accessible locations throughout the state. To "partner" with other organizations when possible, to avoid duplication of Educational effort.

Quality Indicators: Quality of educational program is monitored by utilizing speaker evaluation forms at the workshops as well as membership surveys.

Growth Objectives: To expand our educational program audience by targeting educational needs in diverse areas of the healthcare management work force. We will strive for the Charles F. Mahler Gold Award in Education.

Communication and Participation

Service Goals: To produce one Chapter Newsletter each quarter which provides educational articles, legislative updates, new member profiles, educational program updates, and other areas of interest to it's members. Expand utilization of new technology to bring education directly to the member's facilities. To schedule committee meetings in conjunction with educational seminar to improve communication.

To maintain and develop the Chapter website to improve the membership's access to timely information.

Quality Indicators: Surveys along with personal contacts continue to be the best method of measuring quality in this area. The Chapter will enhance newsletter through improved publication techniques such as pictures, layouts and feature articles.

Growth Objectives: To enhance the quality of the four newsletters through the use of an editor's publication calendar and survey results.

Quality Services

Service Goals: To utilize the membership survey to improve services to the Montana Chapter.

Quality Indicators: Survey the membership and note suggestions for improvement and/or deficiencies.

Growth Objectives: To continue our participation in the HFMA National survey as a tool for effective decision-making.

Goals for Chapter Growth

Membership Growth

Service Goals: To maintain membership and to educate potential new members and reinforce the value of the organization with existing members. The Membership Committee will actively recruit new members from health care facilities. The Montana Chapter will also look at expanding electronic communications. We will reinforce HFMA membership value, especially in those facilities without any current members.

Quality Indicators: Potential new members will be contacted by direct mail and followed-up with a personal contact. All non-members at workshops will be provided with an HFMA application and an opportunity to discuss the value of membership and participation with a Board member. We will use the National survey results to assist us in meeting the needs of our members.

Growth Objectives: We obtained 202 members for FY 2005-06 . We will strive to maintain at least 200 in future years.

Certification

Service Goals: To educate members on the benefits and process of attaining certification and mentor members interested in certification.

Quality Indicators: Do certified members increase or does interest in certification increase?

Growth Objectives: Increase certified members by 2 before May 31, 2008.

Corporate Sponsor Program

Service Goals: Develop a new invitation that is more specific and follow-up the initial mailing with personal phone calls. In addition to the current Sponsor Boards, new recognition packets need to be developed for each sponsor.

Quality Indicators: Specific policies on advertising and sponsorship need to be developed.

Growth Objectives: Increase corporate sponsor income by 5 percent over the previous year's actual amount.

VI. EXECUTIVE SUMMARY

The Montana Chapter of HFMA is dedicated to providing professional development to its members. The Montana Chapter has enjoyed a slow but continued growth in the past. Our primary focus is on improving the quality of education and networking opportunities for the current members, and on welcoming and connecting new members. Member retention is important, as well as seeking new opportunities to network and share member expertise with other healthcare organizations, including a variety of providers.

The Montana Chapter of HFMA has identified key strengths that provide value to our members. We also are aware of significant opportunities to improve Chapter performance. We will continue to look to our new members for fresh perspectives, to our long-time members for experience and guidance, review our goals each year to be certain of their relevance and establish new objectives as deemed necessary by the membership.