**Chapter Advancement Team (CAT) Facilitation Questionnaire**

**Background Preparation for Facilitation**

*HFMA’s Mission: Leading the financial management of health care*

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| **General Questions** |

*{Share the experiences / bio of the CAT}*

* Why does your chapter want to have a CAT facilitation?
* What issues/topics do you want to address or focus on?
* What do you want to accomplish with the facilitation?
* Do you already have an agenda in mind?
* Are there any budget issues we have to consider?
* Does your full leadership team (or board) support having a CAT facilitation? If not, what are the issues?
* Who would you like to invite to the facilitation meeting?
* Do you have (or are you willing to put in) the necessary time to plan the facilitation with me?

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| **For Chapters Who Have Had Past CAT Facilitations** |

* What did you do/accomplish in your past facilitation meeting(s)?
* If goals were set during the facilitation meeting, was your chapter able to carry them out?
* If not, what were the obstacles?
* How was the facilitation received by your leadership team (or by the participants)?
* How can we build on what was done in past facilitations?
* [NOTE: Reach out to previous CAT facilitator]

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| **Logistics** |

* How much time will be allotted for the meeting?
* Where will the meeting be held? – hotel, restaurant, banquet center, provider facility, vendor office, other?
* Will the facilitation be piggybacked with another chapter event? Is there anything else going on besides the CAT facilitation either during, before, or after – such as a board meeting, education event, new leader training, leadership dinner?
* Is there flexibility on the date and/or timeframe of the facilitation meeting?
* Can the date of the meeting be changed to either add more time or make it a dedicated meeting?
* Ask if you feel there’s not enough lead time to plan the facilitation and/or invite the attendees
* That there’s too many other things going on that day
* There won’t be enough time to address what they want to accomplish that day.
* Can we add more time to the meeting? – start earlier, end later, have a working breakfast or lunch
* Can we schedule a follow-up meeting? If there’s much to be done – either by conference call or a second in-person visit.

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| **Travel** |

* When do I need to arrive for the facilitation?
* Are there other events that I need to attend besides the facilitation meeting?
* What airport should I fly into? – Chicago has Midway and O’Hare. Flying into the wrong airport could mean a couple extra hours of travel time getting to the hotel/meeting location and could cause additional expense and/or hassle for the chapter.
* Should I make my own hotel reservations or will you take care of it?
* Once I arrive, should I take a taxi, rent a car, or will someone pick me up?
* Is there a chapter specific expense report that I need to complete when I submit my expenses to the chapter? If so, could you please send to me.
* Would you like to get together for dinner (breakfast) before the facilitation, so we can meet face-to-face ahead of time and go over last minute details?

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| **Chapter Balanced Scorecard (CBSC) Goals** |

* How are things progressing with this year’s CBSC goals?
* Do you think you’ll meet all of them? Or, do you anticipate any challenges/problems meeting them?
  + If problems - What have been the challenges/obstacles in meeting the goal(s)?

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| **Strategic Planning** |

* Does your chapter have a strategic plan?
* If yes, what time span does it cover – short term, long term (how many years)?
* Is your plan a working document that you actually use or does it just sit on the shelf?
* How much have you accomplished – or where do you stand in terms of progress?
* Do you review your progress at your board meetings?
* Do you have action plans to carry out your goals that identify timelines and responsible parties?
* Ask to see current and previous strategic plans.
* How has your chapter developed its strategic plan in the past?
* Has your chapter ever done a strategic plan if they don’t currently have one? If yes, how long ago?

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| **Leadership Team/ Chapter Structure/Succession Planning** |

* How is your chapter structured? What is the organizational structure of your chapter?
* Tell me about your leadership team – officers, directors, committee chairs
* What are the strengths and weaknesses of your officers (directors, committee chairs)?
* Are your committee chairs also directors?
* Do you have co-chairs for your committees?
* Tell me about your committees
  + What committees do you have?
  + How many members on each committee?
  + How do you recruit committee volunteers?
  + Do you do committee training? Is so, what do you do?
  + Do you have written committee plans for the year?
* Tell me about your chapter’s succession planning process for committee chairs, directors, and officers.
* Tell me about your chapter’s volunteer recruitment process.
* How often does your Board of Directors meet? How do you meet – in person, conference calls, combination?
* Do you have an executive committee (officers) that meets in addition to your board meetings? If so, how do you meet and how often?

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| **Behind the Scenes Issues** |

* Are there any issues/problems the chapter is experiencing? – probe people/personality issues, resistance to change, naysayers, lack of volunteers, lack of procedures and/or policies, unexpected loss of a chapter leader, inexperienced leaders, etc.
* What’s the current environment of the leadership team (could be executive team, full board, and/or committee chairs) – are they engaged, open to change and ready to move forward or are they apathetic, burned out, closed off to change – or some of both?

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| **Thought Provoking Questions** |

* What are the top 2-3 things about your chapter that keep you up at night?
* If you could accomplish just two (or one or three) things with this facilitation, what would they be?
* If you could accomplish just two (or one or three) things in your year as president, what would they be?
* What do you think a member would say about your chapter?

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| **Follow-up Call** |

* Drill down to main objective / end goal
* Identify the chapter leaders who will be most likely to champion forward progress, guide the next steps, and advance engagement.
* Clarify roles of CAT and other leaders
* Finalize schedule, including post-facilitation follow-up
* Identify key contacts to attend; encourage RE to attend