

## 2024 Success Award Winning Submissions

### ENGAGEMENT CATEGORY

**Chapter Name:** Arizona

**Submission Type:** Chapter

**Award Title:** AZHFMA Membership Engagement by Certification Challenge with the Stretch Goal to Beat National's Certification Average

**Submission Summary:** The Arizona HFMA Chapter is submitting our success award for our improved membership engagement by exceeding the National Certification Percentage and significantly increasing certifications earned in fiscal year 2024. As demonstrated by our application, we have surpassed our anticipated goal.

### **Needs Identification:**

In May of 2023, AZHFMA had 2,882 members on its roster. Over 92% of members were enterprise members, and many of these were not engaged nor realized the value of HFMA. Enterprise organizations shared that they wanted to see increased certification of members, training, webinars, benchmarking, and local chapter focus.

HFMA is the only organization with in-depth certifications that cover the sundry financial aspects of healthcare. AZHFMA wanted to remind its member community of the value certification offers organizations. The value of certification extends to the member, the member's organization, and to the community served by providing an improved skillset and knowledge.

AZHFMA enticed the Enterprise members with a Certification Challenge promoting each area of need: Finance and Accounting, Managed Care, Revenue Cycle, Medical Group, and Business Intelligence.

The chapter combined the membership and certification committee teams to create a shared mission and focus on member engagement. The team met frequently to brainstorm ideas and effectively implemented many of them. A data review identified the need to validate Enterprise Member rosters for accuracy. Working with the Enterprise Organizations, the team assisted with the necessary revisions to ensure that the organization rosters were exact.

### **Goals and Objectives:**

We had two stated goals surrounding certification. The first was to increase the total number of certifications within our chapter by 40% from the prior year, and the second, for the AZHFMA certification percentage to exceed the National certification percentage. At the start of the fiscal year, Arizona had 13.99% of its members certified and National was at 17.32%. It was our Mt. Everest. As we increased AZ certification percentage, we would increase the National percentage as well.

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

- Focus predominantly on enterprise engagement.
- Bring visibility to the value in certification.
- Celebrate achievements.

### **Methodology:**



We incorporated several initiatives to meet our goal.

We sparked friendly competition with an enterprise member certification. The Organization with the most improved percentage of certified members won a trophy and “bragging rights” for the year.

Organizational commitment was displayed through the various ways Enterprise providers encouraged their staff to earn certifications:

- Continuous encouragement such as special recognition during department meetings and a pizza party for the team with 100% certification.
- Employers made certification(s) part of their employee’s annual goals.
- Employers developed tip sheets for staff so they could easily navigate the website to set up their login and assign Arizona as their state chapter in their profile.
- We monitored new member join dates so we could “cheer them on” to earn their certification once they became a member.
- One enterprise system provided a bootcamp to its staff that was attended by over 60 staff members. The revenue cycle leaders all presented a section of the training. This resulted in that organization increasing certifications by 17.59% from June to December.
- Organizations hosted study groups.
- Organizations awarded points for each new certification the employee obtained which could be used to purchase swag.

We continuously discussed the benefits of earning certifications which include:

- Improved employee morale.
- Great benefit to the organization for having educated staff members.
- The use of the digital badge was added to staff email signature lines which demonstrated their commitment to excellence to the community and shared their achievement.
- We have rejuvenated the learning mindset for staff that had somewhat dwindled over the COVID years.

We incorporated a certification spotlight in our Arizona HFMA Sonoran Scoop newsletter for individual recognition. See Attachment 4 to see our spotlights.

#### **Evaluation and Results:**

Our engagement exceeded solely certifications. Exposure to all of the other benefits offered on the HFMA website, such as eLearning and other tools was achieved. By staff having a membership, they have increased their utilization of these beneficial tools.

We are excited to report that Arizona has exceeded our lofty goal of surpassing National’s percentage of certified members! At the time of this writing, Arizona is at 17.22% certified members and National is at 17.17%, so we exceeded our goal. Our average certifications earned in the prior fiscal year was 13 per month and in the current fiscal year, we jumped to 25 earned certifications per month. Please refer to Attachment 1 for the website screenshot and Attachment 2 for the report detail.

Arizona increased the percentage of certifications obtained by 43% from June to February (See Attachment 5).

Because of our certification goals, our true membership has increased tremendously. Our average new memberships in the prior fiscal year were 39 per month, and in the current fiscal year, we jumped to 59 new memberships per month. Please refer to Attachment 3.

We have learned so much in the past year, and that has given us ideas for the next chapter year. We plan to implement these additional strategies.

- We want to take a train-the-trainer approach so that each organization will have the tools they need to train their staff based on their individual organizational needs.
- We would like to place more emphasis on non-enterprise member certification.
- We will enhance our peer-to-peer communication for more brainstorming on ideas.
- We want to find a way to recognize staff who get recertified as that shows the continued commitment to the value of certification.

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**Chapter Name:** Oklahoma & Lone Star

**Submission Type:** Multi-Chapter

**Award Title:** Red River Showdown: A Lone Star and Oklahoma Chapter Collaboration

**Submission Summary:** An Oklahoman and a Texan walk into a conference... and both get along, learn a little, have a blast, and become great friends!

**Needs Identification:**

A great conference and a great story starts where all things start... at the beginning. The Oklahoma and Lone Star chapters had informally tossed out the idea of reinstituting the collaborative Red River conference, but COVID and a general lack of a full commitment to the idea just didn't get it off the ground. Tammy Walsh, at that time the president-elect of the Lone Star chapter, reached out to Tyler Bernier, at that time the president-elect of the Oklahoma chapter, to gauge interest and determine any potential next steps while attending the January 2023 Oklahoma chapter Winter Meeting. At that point, Tyler and Tammy had minimal interactions, but both had an interest in the event.

The Lone Star and Oklahoma chapters have a history of collaborating on events, but we had not been able to reconnect since 2019. And while it was considered a success at the time, there were certain outcomes of the 2019 event that could have been improved, including shared chapter involvement, financial results, diverse agenda topics and overall participation. We could have joined forces on a virtual conference, but both chapters felt the physical connection of a live conference is what drives the value of such collaboration.

As noted above, the results of historical collaborations were considered in determining what was truly needed from each chapter and from the conference itself to be successful. First and foremost was as equal as possible activity and involvement from members of both states. The value in collaborating comes from the sharing of ideas, activities, and results with individuals that are outside someone's common connections. This shared involvement needed to be across the planning committee, volunteer group, business partners/sponsors, conference attendees, and speakers.

Second, the conference needed to be as self-sustaining as possible. Each chapter already has numerous planned events each year that generally require the chapter's resources to continue. While each chapter was in a financial position to support the event if needed, it was considered important to plan and execute the event with a profit or at least break-even status. The greater the financial flexibility, the more that could be invested in the conference to meet the other

needs identified. The 2019 event was used as a baseline noting it was budgeted at a loss of \$5,000 and ended with an actual loss of \$2,321.

Third, the feedback from the 2019 collaboration indicated that the sessions were either too revenue cycle focused or not relevant to the industry, such as a session on hotel security. Both chapters also considered their recent conferences/events, as well as member feedback regarding topics. So, we needed a broad set of relevant topics and speakers to attract the appropriate attendees.

Finally, participation was considered a high need. As already discussed, the ability to connect with peers outside of your normal contact group allows for the sharing of ideas. We needed time available for this connection. We also needed a fun or energetic aspect of the conference – something that can help drive conversations.

#### **Goals and Objectives:**

The conference goals and objectives were directly driven off the needs identified. While participation was the biggest need, the first goal established was the conference budget. This outlined the expectations for registrations, sponsorships, costs, and the expected bottom line impact. Prior to the budget being established, we did analyze the cost of a meeting management group, specifically DeMarse. The quoted fee for this conference was going to be in excess of \$10,000, compared to the \$5,000 in 2019 (which resulted in a total loss for the event).

A stretch goal was established to have 150 registrations, consisting of 12 speakers, 45 providers and 93 business partners. While we ultimately wanted a higher provider to business partner ratio, we looked at previous chapters' conference attendance records, as well as historical OK/LS event participation. The 2017 event had 34 providers to 71 BPs for a total of 32%. The 2019 event had 56 providers to 83 BPs for a total of 40%. Our minimum provider participation was established at 33%. The budget estimated 28 sponsorships varying between exhibitors and special event sponsors. The potential net income established was approximately \$12,000.

A separate "downside" budget was also prepared so that we could work within a range of possibilities. This budget had 135 registrations, consistent of 12 speakers, 40 providers and 83 business partners. It had 18 sponsorships and resulted in a potential net income of approximately \$2,000. Each budget outlined our expected expenditures necessary to run the event.

Overall, the established financial goal was to break even on the event. This allowed us to "reinvest" any expected profits to enhance the conference and participant experience. While the budget was established at 33% provider ratio, we really wanted to drive a higher percentage, so established a goal of 40%, which is at least equal to the last OK/LS event. Consistent with this participant makeup, we also wanted diversity in participation across the states, established as at least 60/40 split either way. Finally, we wanted speakers that were from both states/chapters and beyond, to the extent possible.

Regarding topics, we set out with a goal to have a broad range that included revenue cycle, finance, reimbursement, hospital operations, and an industry update. We also wanted a "celebrity" keynote speaker that would draw attention. Our goal was to not have feedback indicating the topics were slanted in any one direction or not relevant to attendees. We also expected feedback results to exceed the results of the 2019 event. This would be measured by the participant feedback at the end of the event.

#### **Methodology:**

In order to keep momentum and excitement going from the initial conversation between Tammy and Tyler, Tammy started to set up periodic group meetings and a key "executive" committee for the conference. On March 6, 2023, the committee had its first planning call to start outlining the vision, needs, and goals of the potential conference. Tammy

Walsh and Antoinette Washington (Lone Star programs chair) from the Lone Star chapter met with Tyler Bernier, Bill Rodgers (Oklahoma communications chair) and Robert Dudley (Oklahoma board member) and established the groundwork that was necessary for a successful event. And without a meeting management company, we needed time and commitments to pull the event off.

Over the next four months, the group expanded to include Chris Kubin (Lone Star VP), Thera Rhodes (Lone Star administrator), Brianna Bloemker (Lone Star board member), and Karen Knight (Oklahoma volunteer). We worked together and connected as needed to identify an appropriate location, a conference theme, an Operating Agreement with commitments, a budget, and eventually the conference Plan with goals. The most important, and interestingly least used element was the Operating Agreement. This was established, in writing, to outline responsibilities, expectations, funding, etc. regarding the conference as shared between the two chapters. We consider it the most important component because it created the conversation that drove agreement and expectations. Without that, the entire process easily had the potential to fall apart or at least drive contention amongst the chapters. With it, we worked together seamlessly toward the same shared goals.

Without a meeting management company, we needed to develop our own plan. The Oklahoma chapter does not utilize an external company, so had experience with CVENT and planning and running a meeting, but with limited situations involving event sponsorships, CPE tracking, etc. The Lone Star chapter utilizes DeMarse for its events, so much of the process would involve a learning curve. Thera committed to be the designated "event planner" and Bill and Tyler committed to helping bridge the gap on matters such as CVENT, utilization of OneHFMA, etc. The Lone Star chapter also agreed to be the treasurer for the event with a settlement of net income or loss at the end in a single transaction.

To drive energy and excitement and build off the University of Oklahoma and University of Texas annual Red River Rivalry football game, the theme of the conference was "Red River Showdown: Healthcare Beyond Borders" in the crimson and burnt orange colors that represent the universities. We purposefully tweaked the name to "showdown" and added a broader theme to elicit collaboration versus division. This allowed us to have fun with the concept and key in on a former NFL player, if possible, as the "celebrity" keynote speaker.

Ultimately, the WinStar Casino in Thatcherville, Oklahoma was selected as the site for the event. It was picked for a number of reasons, which contributed to the success of the event. The WinStar is approximately 80 miles from downtown Dallas and 125 miles from downtown OKC, thus offering easy accessibility to the largest metropolitan areas of both chapters. While it was at a casino and that created negative feedback from 2019, the event center entrance was directly connected to the hotel and prior to the casino entry. The venue also had a great space and technology for the event with adequate room for a social activity. Finally, there is built in entertainment, onsite dinner options, and best of all it's not near much else to lose attendees to.

With the theme and location firmly in place, the committee searched for speakers and topics to meet our goals. We outlined the broad topics of revenue cycle, finance, reimbursement, hospital operations, and an industry update, and the "celebrity" football keynote speaker. The topics were split amongst the group to obtain speakers from across the two states and outside. We identified three areas to have panel discussions given the draw of this speaking format, even though it is generally more work. The areas included a CFO panel to cover finance, a revenue cycle panel, and a payor panel to cover reimbursement. Again, the goal was to make all panels as diverse as possible for information sharing. We also extended the second day of the conference through 3 p.m. to ensure CPE credit as a draw, plus it enabled us to have longer breaks and lunch times to allow informal conversations amongst the group.

At the same time, we made a concerted push to drive sponsorships to financially support the event. This was an important area to get right for a number of reasons beyond the budget. The Oklahoma chapter primarily operates on annual chapter sponsorships versus event or specialty sponsorships, including allowing most of its business partners to exhibit at any chapter event. The Lone Star chapter has a different approach, primarily driven by the Texas State

conference, wherein business partners can become a statewide sponsor for the year with access to the state conference and all three Texas chapters, or just a Lone Star chapter sponsor. To align with our goals and create as level of a playing field as possible, we decided that the Red River Showdown event would be a separate event outside of either chapter's standard activities. To reward existing chapter or state business partners, however, we first provided a two-week advanced access to sponsorships to the highest-level business partners across the group. An official sponsorship letter was created, and each chapter was responsible for distribution. After the first two-week period, we then opened it up to the remainder of the chapter business partners, followed by marketing to outside vendors through direct connection from the committee or chapter sponsorship chairs.

To create the sponsorship opportunities, we used 2019 as a starting point and expanded from there, identifying an overall conference opportunity, exhibitor tables, and the more common sponsorship opportunities around breaks, lanyards, nametags, etc. A separate CVENT site was established to drive activity and track progress. As the planning continued and new ideas were generated to enhance the conference, we created sponsorship opportunities to match.

Sponsorships were obviously going to be the largest revenue source, but we needed the registrations to fill the gap. Registration pricing also drives participation from both the provider and non-provider groups. In an effort to drive provider participation as much as possible, we established registration fees for the provider group at levels well below the cost of food during the conference alone, specifically \$75 for HFMA members and \$125 for non-members. While we knew sponsorships were going to need to subsidize some of this cost, it was considered a key component of the conference Plan to drive participation.

The executive committee would meet bi-weekly starting in June and move to weekly starting on July 21. While it was a huge time commitment, it ensured we stayed on the same page as each chapter pushed forward towards achieving the goals and objectives established. We felt the "separate, but together" approach was the best to drive action based on our strong chapter relationships. This involved having the same message, such as the sponsorship letter referenced above, but delivered "locally." Communications were sent out via CVENT, chapter emails, LinkedIn, Facebook, the Lasso newsletter, and individual reach-outs. The communication variety was considered very important to ensure the message was received given the prevalence of email blockers and data fatigue.

To help guide the group, Thera utilized the conference "playbook" the Lone Star chapter uses to track tasks, agenda, financials, meeting attendance, registrations, speakers, exhibitors, etc. This document was instrumental in the success of the event and the cohesiveness of the group. Without it, we would have spent the first half, at least, of every meeting regurgitating updates, progress, etc.

With the "meat" of the conference outlined and moving forward, we turned attention to matters that would drive energy, interaction, and a positive attendee experience. What do people like more than anything else? Something free! The group created the idea of a goodie bag for everyone that attends. There is a cost associated with this, but an immediate reaction we wanted to elicit. Many iterations of the bag were developed, but the group landed on a small, reasonably priced, but nice backpack with pockets on the sides for water bottles. We wanted the "gift" to be something that would actually be used versus a fleeting freebie discarded throughout the conference venue by the end of the first day. We then allowed any business partners to help fill the bag with goodies. This contributed to the value proposition for both attendees and business partners. The backpack itself was then turned into a sponsorship opportunity to cover the costs. We used a local vendor, Oklahoma Promo, versus a national shop to order the bags. While none of the attendees would know this, we felt it was important to support the local communities as part of the process.

On August 23, both Tammy and Thera toured the WinStar venue to plan for the event. As a result of this tour, we were able to build additional value-added elements into the conference. First, the entrance and common areas contained numerous TVs and visual displays. We decided this was a great opportunity to sell billboard sponsorships and further drive that revenue source. It even allowed for the display of conference and overall sponsor logos. Next, the social event

space for Thursday night was determined. We decided to utilize the common area space just down from the main conference area as it was open enough to allow for socialization while close enough to drive attendance and participation. The space also allowed for an entertainment option. Tammy used her connections to secure a singer from the Dallas area. Again, to help cover the costs of this added expense, we added a sponsorship opportunity.

We decided it was important to have a conference app available. Bill helped to design and build the app using the Cvent platform. It required new requests for appropriately sized logos, information to build out sponsor profiles, etc. Besides promoting the app via email updates and our Know Before You Go email, a QR code was established, and tabletop cards were created to distribute during the event to drive individuals to the app. Finally, we created contests and giveaways during the conference. One of the primary ways to win prizes was to actively participate in the app's gamification abilities, specifically by climbing the points leaderboard.

As the event drew near, the group worked diligently to hammer out all final details, sharing the workload to ensure everything was covered. We worked with the venue to secure a private board room starting the afternoon prior to the event to connect and iron out open tasks, including stuffing welcome bags, writing thank-you notes, setting up AV and WiFi, placing tabletop cards, and coordinating all other activities prior to and during the conference.

And now it was gametime!

#### **Evaluation and Results:**

With the conference in the rearview mirror, we were able to accumulate the results. The raw data was as follows:

The conference resulted in a final net income of \$230.93. The registrations totaled 144. The provider to business partner ratio totaled 46% based on registration status. 129 individuals signed into the conference, or a 90% attendance rate. The provider to business partner ratio totaled 47% based on attendance. Total registrations by chapter were 49 for Lone Star and 37 for Oklahoma (difference relates to individuals with another chapter or not HFMA members), for a ratio of 43/57. All three panel discussions included individuals from Texas and Oklahoma and Tyler and Tammy each moderated a panel. The remaining speakers consisted of individuals from Texas, Oklahoma, Illinois and Minnesota, including former NFL player Lifford Hobley. There were no specific comments regarding topics being slanted in any direction. There was one comment that the motivational speaker "did not relate well to hospital finance." But that was more than offset with a comment stating, "Loved everything about the conference!" Event feedback compared to 2019 was as follows (on a scale of 1 – 5): Event overall – 4.57 vs. 4.42; Topics – 4.49 vs. 4.30; Cost – 4.35 vs. 4.26; Location and Venue – 4.35 vs. 4.45; Networking – 4.49 vs. 4.42; and Food and Beverage – 4.22 vs. 4.26. While not a goal, the conference app had 110 downloads and 64% of attendees logging in.

As a group, we joked about the possibility of running a meeting with a profit and established our goal to break-even, but honestly didn't think it was possible. History told us, this event would lose money. All other conferences for both chapters lose money. After the conference, the final transactions were accumulated, reaccumulated, scoured and reconciled... and we had a PROFIT!

As noted previously, we made a concerted effort towards marketing the event through multiple mediums and making it as provider-friendly as possible. We did not offer free provider passes, however; and currently health systems are monitoring costs, trainings, and time away. So, to have almost a 50/50 ratio of providers was well beyond our expectations.

While we could not control the speakers, we hoped our planning and strategy around selecting speakers and topics would pay dividends. As noted above, our Topics feedback score was 4.49 and all speakers received an average feedback ranking in excess of 4. In addition to the diversity of topics and speakers, we were very proud of the payor panel we were able to secure for the event. The group consisted of three CEO's / presidents of health plans that traveled to

Thatcherville, Oklahoma to speak with what could be an adversarial group. While there were difficult topics and discussions, it was educational and we believe helpful to all that attended. And the panelists stayed after the session to answer questions from and interact with the attendees.

The activities regarding managing the meeting, including CVENT; making and receiving payments and tracking the finances; communicating internally and externally; prepping conference necessities; running the actual day-of show; etc. all went as smoothly as possible. While planning factored into this, it really came down to the blood, sweat, and (since we didn't have any tears) manual labor of the conference committee. From designing and printing name badges and drink tickets to taking pictures and posting to social media to managing presentations, all without a meeting management company, it came down to us.

During the conference, we utilized the CVENT app. It allowed another way to stay connected with attendees and added some fun. As previously discussed, we utilized the gaming function for prize giveaways between presentations. We also shared the slideshows from each session via the app and highlighted our sponsors. It was a fantastic way to keep the conference interactive and the fact that over 110 individuals downloaded the app and over 64% actually logged in and toured it, showed the value.

We did run into some obstacles. We found out last minute that one speaker would not be able to participate and another would not be able to travel in time; we pivoted. We connected with an individual on our initial listing of target speakers and Anna Brewer with JTaylor filled in the Industry Update without missing a beat. In order to incorporate Nio Queiro into the Revenue Cycle panel, it took a little more legwork. It takes very specific technical expertise to set up a panel discussion where the panelist can hear commentary from the panel and also speak without sound feedback. Luckily, Miranda Lambert was having a concert that weekend, so the convention area pulled one of its technical experts to complete the set up. This ultimately cost additional labor time in set up and monitoring during the session, but we knew we had extra in the budget and Nio's national expertise was something we thought was important to deliver to the group. There were many situations that could have derailed the event or segregated the group. None of them did. Despite what seemed like a lot of work (and it was), we all enjoyed and had a blast doing it.

By all measurements, in comparison to our established goals, the conference was a success. We hit the mark on all measurable factors. But we all know, the numbers alone don't tell the full story. So, here is what truly merits this event for consideration of a Success Award.

At the beginning, we were a number of individuals interested in planning a conference. Most of the committee did not actually meet in person until the day before the event. We spent a lot of time getting to know one another throughout the process, however. When we departed, it was definitely as more than conference planners... it was as friends.

The conference itself had numerous high points and looking back at the smiling faces and fun times in the pictures, it's clear why it was considered a success. But this story is about more than a two-day event. Instead, this is about a group of individuals that worked together to provide meaningful education and tools to support the industry in our region, but, more importantly, built relationships that will carry on well past an event. The outcome truly reflects what HFMA is all about.

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**Region Name:** Region 10

**Submission Type:** Region

**Award Title:** Virtual Rural Health Symposium

**Submission Summary:** Region 10 rural healthcare providers share many of the same challenges, regardless of their individual chapter location. With budgetary constraints for healthcare providers to attend in-person events, we knew engagement would be improved for these members if we combined efforts at a regional level.

**Needs Identification:**

The states included in Region 10 are Arizona, Colorado, Idaho, Montana, New Mexico, Utah and Wyoming. Every state in region 10 falls within the top 12 largest states for square mileage. This large physical area creates a unique challenge for the states in this region to serve its rural healthcare provider members.

In Region 10 there are 226 rural healthcare providers including Critical Access Hospitals, Rural Health Clinics, Federally Qualified Healthcare Centers, and PPS Hospitals in Rural areas (Please see Exhibit A for supporting details about the membership makeup of Region 10). Because of the physical limitations of the states and limited number of large cities, some of these members would need to travel over 500 miles to attend an in-person event. During monthly regional calls, chapter leaders discussed receiving similar feedback from members that their travel and education budgets had been cut drastically or eliminated completely, which made attendance to in-person events impossible for many members.

Because most of the chapters within the region struggled with how to get education to those providers who were unable to attend in-person events, chapters agreed the best way to get education to the rural health members would be virtually through a one-day, regional summit focused on the topics most-relevant to the needs of rural healthcare providers.

**Goals and Objectives:**

The goal of the Region 10 Virtual Rural Health Conference was to create membership engagement from each chapter in the region through a virtual event that would have relevant content, specific to rural healthcare providers who don't have the budget to travel to in-person chapter or regional events.

The objectives we identified were that:

- 1.A committee consisting of leaders from every chapter in the region would need to be formed to bring in solid speakers who could present on relevant topics.
- 2.Sponsorships would need to be secured to cover the costs of putting on the event and ensure that there would be no registration fees for the attendees.
- 3.We needed a way to promote the event to members of the rural healthcare community throughout each chapter in our region.

This goal was challenging for region 10 because our chapters have not hosted a joint event, specific to a group that is less engaged, like rural healthcare providers. Accomplishing our goal would provide a higher level of engagement for each chapter's membership by showing the value that there is in having a membership with HFMA.

**Methodology:**

A committee, consisting of chapter leaders from each of the seven chapters in region 10, was created and responsible for the following:

- 1.Event speakers specific to the needs of rural healthcare providers were identified and secured.

2.To Keep the event free for provider attendees, it was agreed that business partners would pay a \$25 registration fee and sponsorship would be secured.

3.Creating and Distributing Consistent Marketing - Items promoting the virtual event were created by a hired administrative assistant and these elements were distributed to each chapter so there was not a heavy lift of each chapter to create their own marketing. (Please see Exhibit 3.a and 3.b for samples of our marketing elements and Exhibit 4 for the event agenda as well as Exhibit 5 for our CEU Certificate for the event).

The committees began meeting in January of 2023 and met monthly until the event took place on July 20, 2023. Promotion of the event began 3 months prior to it taking place, primarily through LinkedIn and Facebook posts on chapter pages and emails to each chapter's membership.

The amount of time the committee members spent included a one-hour meeting monthly, as well as an additional two hours of time total per committee member throughout the planning period. Equating to 56 volunteer hours spent on this project. The Arizona Chapter has a paid Administrative Assistant who helps with their regular events, and this person agreed to do the behind-the-scenes work including creating marketing assets and coordinating the registration process and webinar, which helped to take the burden off the chapter volunteers.

The event lasted from 8:45am–4:15pm mountain time, and each volunteer was on it too. An example of the marketing assets and event agenda are attached for reference.

#### **Evaluation and Results:**

Region 10 sent a Cvent survey to all event attendees after the event to ensure that we met our goals and objectives. A month after the event was held, a post-event wrap-up meeting was held with the committee to review results and decide whether the results warranted the region continuing to hold this event annually. Our evaluation results are attached to our submission in Exhibit 1 - Survey & Attendee Registration.

The results showed -

- 113 people attended our event, 85 of which were from a Provider and six out of our seven chapters had attendees at the virtual event. Please see Exhibit 1 for our attendee registration report.

Upon reviewing in more-detail, the committee identified ½ that attendees who participated do not normally attend HFMA events for the chapter, which shows this venue was engaging with providers who are unable to meet in-person.

- 27 business partners attended, which provided \$675 to put toward providing this educational event. Two event sponsors were also secured and recognized at the event.

- 28 people completed a survey, in which 25 of the respondents rated this event as “excellent” and three rated it as “good”.

Based on the results showing a positive response to this event, Region 10 is holding this event again in May of 2024 and planning has already begun. The committee has taken feedback provided in the survey and implemented changes based on that feedback. For instance,

- Some comments said, “Continue to have these annually” and “The virtual platform was a phenomenal idea! I would love to see more collaboration/presentation from the broader region to support networking and information sharing.” We not only feel this feedback demands that the event happen again, but we have also implemented an idea sharing session at the end of the event with specific topics that the attendees can discuss with their peers from other healthcare organizations.”

- Another comment in the survey said, “Lots of acronyms used throughout which is hard for learning for staff new to healthcare.” We considered the staff at rural healthcare providers and felt this is a concern for many providers in small communities, who may be hiring staff with no healthcare experience. So, our 2024 agenda includes a “Billing 101” session.

The agenda for the 2024 event is also attached in our supporting documents.

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**Region Name:** Regions 10 & 11

**Submission Type:** Multi-Region

**Award Title:** 2024 Western Region's Provider Engagement Key to Successful Conference

**Submission Summary:** The power of creative provider engagement prior and during the 2024 Western Region Symposium became the key to returning the conference registrations to those of the pre-COVID era and placing the event on a positive long-term trajectory.

**Needs Identification:**

The HFMA Western Region Symposium (WRS), the largest HFMA conference after HFMA National, is a long-standing regional event providing attendees from regions 11 and 10 and across the nation with superior education, networking and growth opportunities. The conference takes place the 3rd week of January in Las Vegas, NV. The conference also serves as a key revenue stream for the chapters from Region 11 (Washington/Alaska, Oregon, Hawaii, Northern California, Southern California, San Diego, and Nevada) and Region 10 (Arizona, Colorado, Idaho, Montana, New Mexico, Utah, and Wyoming).

Prior to COVID, conference attendance was growing and pushing 1,000 attendees. After COVID, the number of attendees significantly dropped threatening the value and long-term viability of the event. The overwhelming response from providers was that their budgets were being slashed so they were being selective as to which conferences they would attend.

While the 2022 and 2023 conferences were extremely well managed and accomplished successful profitability, the need of the 2024 WRS Committee was to provide increased engagement with providers so that they would want to make WRS one of their conferences of choice, thus helping to return registration and attendance to pre-COVID registration numbers and place the conference on a long-term successful projection.

The reason the focus was centered on achieving greater provider attendance was due to the following:

- More Engaged Providers = More Business Partners
- More Business Partners = Greater Financial Support
- Greater Financial Support = Excellent Keynote Speakers / Sessions
- Excellent Keynote Speakers / Sessions = Greater Attendance Participation
- Greater Attendance Participation = More Engaging and Successful Conference.

**Goals and Objectives:**

To accomplish the above needs of engaging providers so that they would choose the Western Region Symposium as one of their key annual events and increasing attendance to return to pre-COVID numbers, the WRS committee set the following goals and objectives:

**[Goals]**

- Increase provider engagement and attendance.

**Objectives:**

- o Have a fun and engaging theme to attract people to the event.
- o Consistently deliver engaging conference promotional content (videos/social media pushes) to encourage registration.
- o Secure star-studded keynote speakers with relevant content to issues facing providers today.
- o Create special session focused on provider needs to draw in more providers.
- o Increase provider scholarship opportunities provided by the two regions and individual chapters.
- Increase business partners participation.
- o Share provider registration numbers with current and potential business partners.
- o Increased the Executive Connection Packages
- o Sell all booth spaces and sponsorship packages.
- Enhance attendee engagement and participation.
- o Secure amazing breakout session speakers with relevant content to issues facing providers today.
- o Provide a creative engagement activity to bolster engagement and participation at the conference.

**Methodology:**

To accomplish the goals and objectives, the WRS Committee did the following:

- Increase provider engagement and attendance.

**o Engaging Theme:**

¶ As 2024 marked the 25th year of the conference, the two co-chairs chose the theme of Brazilian CARNIVAL to create a celebration vibe and to develop a foundation for engagement and excitement. (See attached conference theme image.)

**o Engaging Conference Promotional Videos and Social Media Pushes:**

¶ It was decided that the conference chairs (Jason Meyer from Region 11 and Carla Neiman from Region 10) would be the face for the engaging and informative videos.

¶ As both were in different sections of the United States, an idea was created to make Carla a news anchor in a WRS Newsroom with Jason being a roving on-site reporter coming to us live from Brazil and working his way to Las Vegas, NV.

- To accomplish the newsroom and remote settings, a green screen was used while recording using Zoom, so that background images could be applied to the videos.

☒ The videos were designed to engage and promote key and relevant items for attendees of the upcoming WRS conference.

☒ In total, there were 5 promotional and engaging videos created and distributed through emails and social media pushes (LinkedIn, Facebook, Instagram, X (Twitter), and YouTube by WRS event management company and by individual chapters.

- WRS 2024 Kickoff Video (sharing theme and keynotes): See YouTube link: <https://youtu.be/APBRObvg7lc>
- WRS Executive Connection Video (sharing the benefit for provider and business partners at the WRS 2024 conference): See YouTube link: <https://youtu.be/R7E6oPpArLw>
- WRS Provider Hosted and Discounted Option Video (sharing how a provider could attend for little or no cost): See YouTube link: <https://youtu.be/OpulyVgejnw>
- WRS Think Tank Promotion (special session for providers to share and discuss issues and solutions): See YouTube link: <https://youtu.be/3LjGl4s-ZwQ>
- WRS Provider to Provider Invite (special video with provider inviting providers to join them at the conference): See YouTube link: <https://youtu.be/0xO0wZ9K4kw>

○ Star-studded Keynote Speakers:

☒ The keynote committee leveraged national, regional and chapter feedback to secure engaging keynotes with relevant topics facing healthcare today. Additionally, the president's approved expanding the budget to help the keynote committee secure the right speakers. (See attached 2024 Keynote document.):

- John 'JB' Byrd – 'Navigating Federal Policy & the Political Scene in 2024'
- Scott Hamilton – 'Unquenchable'
- CeCi Connolly – 'A System in Crisis: Rebuilding Healthcare in the US'
- Tracy Spears – 'Strategies to Level Up Your Leadership'
- Jim Kozimor – 'Culture, Teamwork and Leadership'

○ Provider Special Session (Think Tank):

☒ Piggybacking off of Oregon HFMA's unique Problem-Solving session, the education committee created the Think Tank Session designed to be a unique open forum meeting where providers sat together, raised issues they were dealing with and received and shared ways each system is addressing the concerns.

- To ensure the emphasis was on the providers own solutions, yet still involve business partners, the room was designed with rounds in the first 2/3 of the room for providers with row seating for business partners in the last 1/3 of the room.

○ This set-up provided the perfect environment for providers to truly engage with each other with our business partners pushing their own solutions, while allowing business partners to hear about the struggles they are facing for future discussions / selling opportunities.

○ Increased Provider Scholarships and Discounts:

☒ Understanding that budget were tight for providers, the WRS regional chapter presidents voted to support the core committee in expanding the following options for providers:

- Hosted Provider Scholarships

- Full conference registration (\$600 value) waived if the provider met key qualification.

- Provider Discounted Registrations

- 50% conference registration (\$300 value) if the provider could not meet key qualifications.

- Executive Connection Participation

- Full conference registration (\$600 value) waived, and rooms covered (\$600 value) for those who qualified and participated.

- Note: There was a 10% increase in the number of Hosted Provider Scholarship, Provider Discounted Registrations and Executive Connection slots approved from the previous 2023 year.

¶ Beyond social media pushed communications, Chapter Presidents from the two regions were given a certain number of the special scholarship and registration discount codes and tasked with inviting providers within their own chapters to take advantage and register.

- Additionally, many chapters created a special travel scholarship funds to help engage provider participation while offsetting airfare expenses for providers who needed the additional help with their conference budgets.

- Increase Business Partner Participation

To provide the discounts for providers, quality education, and special networking and engagement opportunities, it was vital to have the support of WRS' valued business partners. To accomplish this, the sponsorship team was tasked with the following:

- Sharing Provider Registration with Current and Potential Sponsors:

¶ The goal for business partners is to have opportunities to engage with clients and prospects...to sell! To help the business partners understand their opportunity to engage with their target markets, the WRS Sponsorship Committee consistently shared updated provider registration numbers which included name of the facility and title (no individual names or contact information).

- Increasing Executive Connection Opportunities:

¶ The purpose of the Executive Connection was to match providers with vendors that offer solutions they were currently needing or considering and give them 15 minutes (one-on-one) to share how they can help the providers.

¶ Expanding the number of providers invited to participate was one of the goals to increase business partner participation.

- Selling all Booth Spaces and Sponsorship Packages:

¶ To help ensure financial success, it was important to have key sponsorships covered. WRS sponsorship opportunities included:

- 18 Gold Sponsorship Opportunities

- 32 Silver Sponsorship Opportunities

- 73 Bronze Sponsorship Opportunities

- 30 Event Sponsorship Opportunities (keynote, wifi, coffee breaks, lanyards, etc.)

❑ A beautiful WRS sponsorship prospectus was created and made available early to help sponsors understand what they would receive. (See attached sponsorship prospectus.)

❑ Lists of potential sponsors were created, and the sponsorship team made personal calls and delivered special invitations.

❑ The team shared key provider registration to help attract additional sponsors.

- Enhance Attendee Engagement and Participation

- o Securing Amazing Breakout Session Speakers with Relevant Content:

❑ As great education is key to any engaging and successful conference, the education committee looked locally and nationally for industry experts to fill the many breakout sessions.

- This search started a year in advance of the conference to ensure time to vet presenters.

- The speaker list was secured 9 months prior to the conference to help with engagement and promotion.

❑ In total there were 52 experts selected to lead the various sessions.

- Many of the breakout speakers chose to share their content at little to no cost due to the opportunity they had to engage the many providers in attendance. (See attached speaker sheet.)

- o Special WRS Engagement Activity - Brazilian Carnival Floats and Parade:

Every successful conference provides engagement and networking opportunities, and WRS 2024 did not disappoint!

❑ A true Brazilian Carnival includes elaborate floats and costumes as part of the celebration. Thus, playing off of the Carnival Conference theme, the Chair from Region 11 with support from Region 10 came up with the idea of creating a competition for the attending regions and chapters to design and create true Carnival Style floats with matching costumes which would be judged, paraded and exhibited during the event.

- The WRS provided the float frame on wheels and the regions/chapters brought materials to decorate the frames and costumes to match for their members who were walking with the floats in the parade.

- The parade route was lined with attendees from the conference who enjoyed the displays and the costumes.

- Floats were parked in the entrance areas where those coming and going could see, admire and vote for their favorite.

❑ The WRS committee wanted it to create a purpose behind the activity (other than the fun from creating a fun float). To enhance participation in this special engagement activity, they created a format where attendees could vote for their favorite floats by purchasing a ticket for \$1 from the registration booth and placing it in the box of their favorite float. The float with the most votes would receive the Grand Prize trophy and bragging rights.

- Making a Difference: All monies collected through this special event went to support a local dear cause, the Maui Strong Fund.

#### **Evaluation and Results:**

- Increase provider engagement and attendance to return to pre-COVID numbers.

The engagement activities done with providers were successful in helping the WRS return to pre-COVID registration numbers. The objectives worked towards achieving the goal.



oPre-COVID 2020 conference numbers were:

2020

- Total: 992
- Providers: 339
- Business Partners: 603

2022

- Total: 642
- Providers: 157
- Business Partners: 485

2023

- Total: 846
- Providers: 247
- Business Partners: 599

2024

- Total: 952
- Providers: 279
- Business Partners: 673

oNot only did registration increase for providers, but it was the strongest showing in the history of the event from the business partners.

oThe release of the engaging and creative videos and social media pushes, along with the special keynotes and enhanced scholarships / discounts had a big impact.

¶WRS had typically not seen a spike in provider registration until the month before the January conference (December).

¶By the end of October, provider registration were exceeding 200.

¶This, of course, was key to help the sponsorship committee bring in additional business partners and add to the success of the conference.

- Increase Business Partner Participation

oDue to efforts from the provide engagement and registrations, the sponsorship team was able to sell out all available booths and sponsorship opportunities well in advance of the 2024 WRS conference.

oIt was the strongest showing of business partners in the history of the event, hitting just shy of 700 business partners in attendance. The previous high was 603.

2024

- Total: 952

- Providers: 279
- Business Partners: 673
- Enhance Attendee Engagement and Participation
  - The Brazilian Float and Parade created one of the most fun and memorable experiences of the conference.
  - ¶ There were 5 floats designed and entered in the Carnival parade (See attached float picture document.)
- Region 11 Float
- Region 10 Float
- WA/AK HFMA Chapter Float
- Hawaii Chapter Float
- San Diego Chapter Float
- ¶ In all, over 100 people participated in the float design, building and parade.
- ¶ Hawaii walked away with the Grand Prize Trophy.
- ¶ Almost \$600 were raised and sent to the Maui Strong Fund.
- ¶ Feedback from those who participated and those who witnessed the parade was that it was a great way to kick off the conference.

#### An Overall Success

The goal to engage providers through engaging content, star-studded keynotes, special educational sessions, increased vendor involvement, and a unique and engaging conference activity all worked together to bring registrations numbers back to the pre-COVID era and set the Western Region Symposium on an upward trajectory for years to come.

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#### INNOVATION CATEGORY

**Chapter Name:** Greater Heartland

**Submission Type:** Chapter

**Award Title:** Innovate, Engage, Connect: Elevating Member Experience through the Member Engagement Booth

**Submission Summary:** We are thrilled to present our entry for the Success Award in the Category of Innovation, highlighting the Volunteer Committee's groundbreaking efforts in introducing a member engagement booth at our seasonal conferences. This innovative initiative aims to promote the volunteer community experience.

#### **Needs Identification:**

Recognizing the importance of creating a space for members to connect, engage, and explore volunteer opportunities, the Volunteer Committee identified the need to enhance the member experience at conferences while also showcasing our philanthropy initiatives. The aim was to streamline volunteer recruitment and engagement while providing a platform for members to discover available opportunities. The member engagement booth has become a central hub for

gathering, learning about volunteer roles, interacting selfie opportunities with props, engaging prize drawings, and discovering the meaningful impact of our philanthropic endeavors.

**Goals and Objectives:**

Create an interactive space/central hub at conferences to enhance member engagement and retention, promote volunteer roles, and other chapter opportunities.

Educate members about the various volunteer job descriptions and the significance of volunteering within the chapter.

Provide photo props for selfies that will add an element of enjoyment, creativity plus making it a memorable experience, but also create a sense of camaraderie and community among our members.

Provide drawings for prizes just for stopping by the booth/central hub.

Showcase our philanthropic efforts and the impact of member participation in supporting these initiatives.

**Methodology:**

The member engagement booth/central hub was strategically positioned at each conference, offering informational resources, role descriptions, selfies props, and a prize box for drawings. The Chapter volunteer chair and other chapter leadership were onsite to address inquiries, offer guidance, and motivate members to participate. The booth/central hub has served as a catalyst for members to take the first step towards volunteering, leading to a greater sense of fulfillment and connection and community.

**Evaluation and Results:**

The implementation of the member engagement booth at our seasonal conferences has been a resounding success. By providing members with a vibrant and interactive space to connect, learn about volunteer opportunities, and explore our philanthropy initiatives, we have witnessed a significant increase in member engagement and participation.

Members have expressed their appreciation for the engaging and informative nature of the booth, with many taking the opportunity to learn more about the various volunteer roles available within the chapter. See Exhibit C - Volunteer Role Descriptions. The inclusion of props for selfies and drawings for free gifts has added a fun and interactive element to the booth, further enhancing the overall experience for attendees. See Exhibit A – Member Engagement Booth, props for selfies, Drawing Box for gifts.

Moreover, the booth has served as a central hub for showcasing our philanthropy initiatives for each conference. By highlighting the meaningful impact of member contributions to these causes, we have been able to raise awareness and support for our philanthropic endeavors, fostering a greater sense of community and purpose among members. See Exhibit B – Fall Conference Philanthropy Project.

Overall, the member engagement booth has not only fulfilled its objectives of promoting volunteer opportunities and showcasing our philanthropy initiatives but has also enriched the conference experience for members, creating space for connection, learning, and celebration of our shared values and goals.

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**Chapter Name:** Hawaii

**Submission Type:** Chapter

**Award Title:** New approach.

**Submission Summary:** Create different activities to connect with our Hawaii Chapter communities.

**Needs Identification:**

New Approach. Create different activities to connect with our Hawaii Chapter communities. 1-New member campaign, 2-schedule a family event, 3-meet the ohana (BOD) social media post to highlight our Chapter BOD with the “why” on their HFMA commitment to our members and islands communities.

**Goals and Objectives:**

1-Create a new member campaign as we have not had a new member activity or focus for a couple years. Send a welcome email/phone call to each new member, new member coffee/ice cream break or breakfast, give a new member multiple ways to engage virtually (website, social media outlets). Focus on the membership, and to create relationships.

2-Create a Ohana Day event. Open to membership and non-members and their families. Meet the Hawaii Chapter Board of Directors, information of upcoming events, socializing and building a stronger Hawaii Chapter ohana community.

3-Meet the Ohana (Hawaii Chapter Board of Directors) social media post. Highlight our BOD to post on our social media pages.

**Methodology:**

Measure-How many activities we accomplish.

1 activity=Successful 2-3 activities=Excellent 4 activities=Exceptional

**Evaluation and Results:**

Completed 3 activities = Excellent.

1-Membership team to reach out with an email or phone call to the new member who joins our chapter. Scheduled a new member breakfast that we had to cancel due to the Maui Wildfires Disaster. Continued to personally invite new members to Networking events and the Revenue Cycle Seminar on November 9, 2023. Mailed a \$20 Starbucks gift card to 32 new members who have joined our Chapter from 2020 with a notecard that the Chapter President, President-Elect, Membership Director and Membership Chairperson signed with a message “Please enjoy a cup of coffee and bite to eat on us!”

2-We discussed creating an event for our members to bring their families, meet our BOD, share information of all our upcoming events for the FY2023-2024 year and socializing to build a stronger Hawaii Chapter community. Ohana (family) Night, September 9, 2023 at Mililani Rec 3 from 5-9pm. All our families enjoyed a night of swimming in the pool, having dinner, a family rated movie with popcorn and shave ice! Highest amount of networking attendees to date, 79 attendees! Which were 16 member registrants, 18 < 5 years old or and 45 > 6 years old.

3-New type of social post to engage and highlight our followers. We asked our BOD to answer a few questions: Nickname, favorite color, what they enjoy doing outside of work, what inspires them to volunteer for HFMA and what's their favorite part of living in Hawaii. IG reel reached 97 followers with 7 reactions. FB reached 24 people. LI 207 impressions, engaged 22 14 reactions.

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**Chapter Name:** Georgia

**Submission Type:** Chapter

**Award Title:** Create a transformation strategy that will bolster Georgia's abilities to better connect, relate, and attract providers and business partners.

**Submission Summary:** Georgia's last annual membership survey highlighted many opportunities to improve, and the most common theme from the feedback from our 5,000+ members was the need for more connection opportunities for providers and business partners. Our goal was clear – focus on transforming our chapter's abilities

#### **Needs Identification:**

The Georgia chapter has always had “meaningful connections” with all of our members (providers and business partners) as our top focus area, and what we heard most from our members in the annual survey was that they want more (in every sense – more content, more sponsorship opportunities, and more ways to engage with members). Specifically, our members want more accounting/finance topics, more onsite and virtual opportunities to learn, and different ways to learn and engage with content (white papers/case studies for example). Georgia's cornerstone has been around how we can connect with our members in the most meaningful way – it has always and remains our passion.

#### **Goals and Objectives:**

We had a multi-pronged goal to achieve major milestones in our quest for Transformation 2.0:

- i) Deliver diverse topics that meets and exceeds the needs of our membership
- ii) Increase participation and engagement in onsite and virtual educational events
- iii) Provide an opportunity for Chapter Sponsors to provide case studies each month to educate our 5,000+ members
- iv) Diversify our educational events across the state to allow for our diverse membership of 5,000+ to be able to participate and attend in either mode (onsite/virtual) or location (metro Atlanta vs rural).
- v) Create a campus outreach program

#### **Methodology:**

The CPAR DNA model of success we analyzed and worked to replicate to create Georgia's education 2.0 initiatives:

- i) Knowing the need of our membership – Georgia chapter realized that patient account representatives across Georgia in health systems, medical groups, and doctor's practices – wanted an economical way to learn about healthcare finance and revenue cycle, feel like they are accomplishing something in their career, and also feel a sense of relevance.
- ii) Understanding the relevance of the content we create and curate for our membership – Georgia's CPAR lessons are constantly updated with the latest and most relevant healthcare finance and revenue cycle topics – as a great example, the no surprises act and price transparency content were two big healthcare industry topics that made the CPAR so popular over the past 2-3 years.
- iii) Continuous improvement and refinement to stay current

In 2016, the new Advanced CPAR program was established to help diversify the content and relevance for our students. In 2017, Georgia HFMA moved the CPAR exam program to an on-line learning and testing platform. This change allowed students to test at any time from any location.

- iv) Revenue generation

CPAR exams and lessons have accounted for a significant portion of Georgia Chapter's annual income. Due to diversifying the educational content and offerings – CPAR and ACPAR (specialty), Georgia continues to rake in revenue associated with both offerings.

Georgia chapter's 2023-2024 theme is "Crazy. Rebellious. Genius" and it was adopted from Apple Inc.'s "Think Different" campaign. My charge to the officers and board this year, in typical Apple Inc fashion - was simply to... "increase connections amongst our members (providers and business partners) in the most meaningful way ever" – in crazy, rebellious, and genius ways. We believe strongly in our efforts this year and our performance against benchmarks are qualitative proof of the success of our most meaningful initiatives. We still have work to do, but we've created a great foundation to help bolster our initiatives to provide the best educational opportunities in Georgia, while hopefully continuing to be a best practice for other chapters to leverage our educational models.

Georgia Chapter brainstormed at our Mini LTC, at LTC, and then used our Spring Institute in 2023 to do formal strategy planning on our education 2.0 initiative. The board and officers came up with an incredible multi-pronged approach to achieve our goals:

#### Initiative #1: EmpowerU Series

Purpose: EmpowerU is a webinar series targeting new members and providing them with essential knowledge and insights into leadership development, industry trends and how to strike a healthy, fulfilling work-life balance. The goal is to not only demonstrate the value of Chapter membership but also increase involvement.

"The idea came from wanting to engage new members and build our relationship with them by providing professional development on the skills they need to grow in the healthcare field," said Kris Seymour, director of transformation and project management operations at Wellstar Health System in Marietta, Ga., and chair of the Chapter's programs and education committee. "We also hope the program will encourage them to utilize more of their HFMA member benefits."

#### Initiative highlights:

i.The EmpowerU webinars are designed to provide participants with the opportunity to gain insight into emerging trends, network with peers and enhance their abilities to navigate the complex landscape of healthcare finance. Each webinar is 60 minutes long and takes place over the lunch hour. There have been four so far, and topics included certification, Medicare challenges, public speaking and exploring the power of resilience and having a growth mindset. Upcoming webinars will feature a disability-focused DEI discussion and tips for new leaders.

Georgia's EmpowerU series dates and topics so far this year:

September 2023: HFMA Certifications

October 2023: Demystifying Medicare Advantage Changes for 2024 and Beyond

February 2024: The Art of Public Speaking

March 2024: Resilience, Perseverance, and Growth Mindset for a Synergistic Future

April 2024: Disability/DEI

June 2024: Success Tips for New Leaders

ii. Multi-disciplinary collaboration – Georgia HFMA tapped all experts on the board to make this initiative successful (Marketing, Communications, Forums & Webinars, Programs and Education), in addition to partnering with our chapter sponsors.

iii. HFM Magazine feature – due to the incredible content, amazing attendance, and ultimate success of the EmpowerU series, this program initiative will be featured in the HFM April 2024 magazine. We are VERY proud of this accomplishment and even more excited about where we are going next with the EmpowerU series.

Initiative #2: Case study newsletter to accompany monthly newsletters

i. Purpose: Primary objective of this case study offering is to highlight solutions and success stories of business partners with provider organizations in the Southeast region in the revamped GA HFMA Monthly Newsletter.

ii. Initiative highlights:

a. Georgia chapter used the CPAR model/strategy to figure out how to monetize the case study newsletters and we were able to begin with 2 issues – raking in \$1,000 (\$500 each). We now have issues for the remainder of 2024 which will bring in \$6,000 in new net revenue.

b. Georgia's very first 2 issues that had incredible engagement scores:

-December 2023: Denials Recovery Uncovers \$40 Million in One Year

-Business partner highlight: Cloudmed

-February 2024: Enhancing healthcare finances and access.

-Business partner highlight: Xtend Healthcare

Initiative #3: Education across all modes of communication: onsite + virtual

i. Purpose – since COVID, the Georgia chapter worked hard to be able to produce content in a hybrid manner to meet our 5,000+ membership in every form and through every possible channel. With our education 2.0 initiative, we wanted to take our virtual and onsite education to the next level. We did so by pushing boundaries in terms of how we deliver the educational content – we mimicked best practices across various industries and came up with 2 incredibly attended and popular events – a Finance/Accounting month and a Virtual Sip + Learn (involving delivered wine boxes to attendees' homes). Both of these well executed events were based on feedback from our annual membership survey wanting and needing more content around finance/accounting topics, in addition to delivering more educational content in general. We are very proud of the success of these two events that clearly shows we are able to respond to our membership's feedback while also delivering the content they asked for, in the most innovative and creative way possible. Finally, the other way we wanted to deliver content in a creative manner, was through our podcast channel. We have record engagement with our podcast channel compared to our Youtube channel – our podcast engagement is over 400% that of our Youtube channel. We wanted to reach out membership in a valuable manner – by delivering digital content to them from our Fall and Spring institutes so they could always have their "favorite" or "best" presentation/keynote/speaker at their fingertips (literally). We did so by digitally recording the Fall institute keynote – and created our very first "Institute" podcast episode. This helped us create structure for upcoming institutes to understand the technology needs, and most important, the needs of our membership.

ii. Initiative highlights:

• Finance / Accounting month: March 2024, involved a Four-part series, "Financial Frontiers: Navigating Excellence." Every Thursday in March from 12 p.m. to 1 p.m., starting on March 7th, 2024, we did a dive deep into crucial topics that

redefine financial strategies in healthcare. Captures the spirit of exploration and mastery as we delve into cutting-edge strategies, transforming traditional finance and accounting in the healthcare domain.

- Sessions we held:

- March 7, 2024: Medicare Bad Debt: Reporting and Identifying Reimbursement
- March 14, 2024: Unlock Resources, Create More Impact: Choices for Unleashing Resources to Gain Capacity and Improve
- March 21, 2024: Strategies to Measure and Improve Emergency Department Performance
- March 28, 2024: Hot Topics in Medicare Reimbursement
- Virtual wine tasting – completely sold out event registrations for this event, with incredible logistics being handled around getting wine boxes delivered to every registrant to their home address in the time for the event. The event's intent was to educate (in a fun and enjoyable manner) our membership on provider price transparency rules and changes to pricing transparency requirements, as outlined in the 2024 Outpatient Prospective Payment System (OPPS) rule.
- Virtual Sip + Learn, Price Transparency: Future Regulatory Path and Role in Creating a Patient Centric Health System. We'll discuss the current price transparency rules and changes for 2024. We'll also address the impacts this will have on payer-provider relationships and how providers can apply this understanding to accelerate efforts toward creating a patient-centric health system.
- Podcast of all "Georgia HFMA Institute" content including keynote speakers
- We created two podcast episodes around the Fall Institute 2023
- One published September 18 highlighted key agenda items and speakers to allow members who are not normally able to attend a glimpse into the event.
- Second was published in November 2023. This episode highlighted keynote speaker Malcolm Mitchell. In this episode, he inspired healthcare leaders to think differently about how we impact the communities we serve.

#### Initiative #4: Education across all parts of Georgia – Metro Atlanta + rural Georgia

Purpose: To provide education to our rural hospital community, through the offering of single day institutes and events, that allow GA HFMA to bring the education to our providers and health systems in rural areas. Through the focused efforts of one-day educational institutes, GA HFMA expands its footprint to our rural hospitals, community health clinics, and regional healthcare facilities, providers, and operators who are unable to attend our centralized multi-day institutes due to cost, travel, and competing priorities.

#### Initiative highlights

##### One-day North Georgia Mini Institute

- Partnership with ACHE and HIMSS (Other Healthcare Organizations) to offer front facing education at the doorstep of our rural hospitals.
- Provide healthcare solutions for smaller hospitals with different payer mixes, limited resources, and opportunities for technology partners who can help meet their needs.
- Providing a more intimate space for business partner members to connect, create relationships and help rural health systems resolve obstacles that are impacting their financial success.

- Creating a purpose driven educational institute that provides solutions to patient point of service collections in a population that has a smaller payer mix, resolving denials that are impacted by manual processes that are implemented in place of technology (due to cost), and customer service techniques that can be used to improve the patient experience.

Initiative #5: Partner with local colleges to be able to provide student scholarships, increase volunteering opportunities, and provide mentorship to budding Healthcare Finance/Administration students

Purpose: To partner with HFMA-Georgia Chapter and engage Georgia State University's (GSU) Healthcare Finance/Administration graduate students through professional workshops, networking/social events, live conferences, volunteer opportunities, and much more. GSU graduates will interact with financial professionals and gain insightful market-ready experiences and knowledge to foster collaboration and innovation.

- Initiative highlights

- Build a university and campus outreach model to help attract, retain, and educate future healthcare administrative/finance leaders
- GA HFMA Board members, GSU Professor and Associate Director of Student Engagement had a meeting to discuss the GA HFMA Outreach/New Member Initiative
- Provided the GA HFMA virtual calendar events to the GSU graduate students to register/attend events, free of charge
- Members from the GA HFMA chapter visited GSU (March 5th, 2024) to speak with graduate students (audience of 50+ students) of Professor Eaton's Health Finance class regarding HFMA, events, membership, and student scholarship for the upcoming Spring Institute.
- Plan to award a minimum of two student scholarships for the upcoming Spring Institute
- GA HFMA board members and RCB representatives to meet and discuss future endeavors

**Evaluation and Results:**

Georgia chapter 5-pronged approach towards Education 2.0 initiatives – results:

Initiative #1: EmpowerU Series

- Metric of success – increase in attendance by 25% compared to prior year's educational webinars
- Actual Performance:
  - oAverage attendance for prior year educational webinars was 15 participants per session. Once EmpowerU series was implemented, the average attendance for educational webinars rose to 60 participants per session - a 300% increase in attendance month over month compared to prior year.
  - oThe Financial Frontiers webinar series for March 2024 has 120 registered participants. The sessions will be recorded, so that participants who are not able to attend can review the content.
- Reflection/feedback – We are incredibly proud of this education initiative and we are excited that HFM magazine will be featuring this initiative to the world in April 2024. As with all of our initiatives, we will continue to strive to improve on this initiative by way of content, marketing, and increased engagement. We always incorporate our membership's feedback from the surveys, and will continue to do so.

o Approximately 200 members have participated in the webinars to date, and based on the response, what began as a four-part series will now be ongoing. Seymour said one of the keys to the successful launch was LaTrenda Dumas, a member of the Chapter's education committee, who pushed for a series specifically for new members.

o "You've got to find someone who is passionate about the intention of the program," said Seymour, who added that the support of the Georgia Chapter Board and team members Jasmyn Patmon, Jose Ajanel and Courtney Hawkins was also essential.

o Seymour's additional words of advice to other Chapters launching a new program include ensuring that speakers understand your intent and are a good fit for the audience, scheduling the sessions around the same time each month and not getting discouraged with low registration.

o "Every session won't be a homerun," Seymour said. "Instead, look at it as an opportunity to adjust your subject matter."

b. Initiative #2: Case study newsletter to accompany monthly newsletters

- Metric of success – monetize this initiative and implement

- Actual Performance - December 2023 through February 2024 timeframe. Two case studies were submitted and we were able to rake in \$1,000 so far (\$500 per issue). We are projecting a \$6,000 increase in new net revenue to the chapter because of these newsletters, by the end of 2024.

- Reflection/feedback – The December case study was not able to track clicks due to case study being embedded in the newsletter. In February, we were able to track the click rate. The newsletter had 261 clicks, while the case study had 85 clicks, a 33% engagement with the case study.

c. Initiative #3: Education across all modes of communication: onsite + virtual

- Metric of success – create Podcast episodes of all GA HFMA Institute content

- Actual Performance – created Podcast episodes of 2 educational events from Georgia's Fall Institute 2023

- Reflection/feedback – While we were not able to capture every single educational event at Fall institute, we were able to get over 75 downloads of each of the episodes we uploaded, representing a 400% increase in engagement compared to our Youtube channel. We had several learning lessons around technical and communications that will now help us to be able to capture all of Spring Institute 2024 via Podcast episodes.

d. Initiative #4: Education across all parts of Georgia – Metro Atlanta + rural Georgia

- Metric of success – Create a one-day mini-institute in rural Georgia

- Actual Performance – Implemented the one-day institute with an exceptional agenda on the patient financial journey

- Reflection/feedback – We are very excited about our first formal attempt to include our rural Georgia members, and we have now built a template for how to keep this going year over year. This infrastructure of education to our rural Georgia community is first and foremost in our annual goals, and we are thrilled to have implemented this incredible opportunity for our rural Georgia members.

e. Initiative #5: Partner with local colleges to be able to provide student scholarships, increase volunteering opportunities, and provide mentorship to budding Healthcare Finance/Administration students

- Metric of success – Build a university and campus outreach model to help attract, retain, and educate future healthcare administrative/finance leaders

- Actual Performance – Georgia HFMA created a template for this campus outreach program and we will be formally unleashing and implementing the outreach program in 2024-2025.
- Reflection/feedback –
  - oThis campus outreach program is a brilliant way to create Georgia HFMA's bench strength and will help to directly bolster our volunteer opportunities, our event participation and engagement, and ultimately increase engagement across all chapter activities. By providing an opportunity to mentor and support these graduate students, Georgia HFMA is investing in our future as a chapter that continues to see increased engagement and innovation in every facet of the work we do.
  - oQuote from one of the students who attended (via LinkedIn): "I am excited to share that I joined the Healthcare Financial Management Association (HFMA) as a student member after an excellent presentation from leaders in the organization that have contributed to its success for over a decade. It is inspiring to see healthcare leaders speak about advancing the healthcare financial system through collaboration and innovation and show their passion with their dedication and service. Thank you Dr. Robert Eaton for having HFMA come speak to our class and thank you Matthew Fisher, Christine "Michelle" Whitehead, BBA, ACPAR, and LaTrenda Dumas, MSHA, LSSGB, CRCR for sharing your profound insights and experiences."
  - oWe are thrilled to see what this campus outreach program is going to do for the chapter in the upcoming year – we are proud to serve our community in this valuable manner – through mentorship, education, and support.

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**Chapter Name:** Southwestern Ohio

**Submission Type:** Chapter

**Award Title:** Driving increased member participation by pioneering new pathways – SWOHFMA Book Club and Denials Bootcamp

**Submission Summary:** SWO created 2 new events; a book club series that sparked interest in members traditionally not participating in local chapter events & transformed an existing event into a full day denials bootcamp, bringing providers, payers, & business partners together in a collaborative, engaging environment.

**Needs Identification:**

Southwestern Ohio currently has the largest member base of all individual HFMA chapters. The high volume of members has historically presented difficulties in achieving participation percentages greater than .25%. Given our large enterprise membership base, we have a significant percentage of our members that are in front line employee positions that typically are unable to attend in person events. Our goal was to create a new book club event series that would spark interest in members traditionally not participating in local chapter events and transform an existing event into a full day denials bootcamp that would bring providers, payers, and business partners together in a collaborative and engaging environment.

The SWO chapter recognized our previous inability to garner participation from large enterprise members that traditionally used HFMA membership primarily for certifications, resources, and training capabilities for their front-line employees. These individuals are not often able or permitted to leave their place of work to attend in person events or felt that the content provided in both live and virtual events were geared toward leaders and emerging leaders, not topics in their wheelhouse. At the same time, we saw an opportunity to create a separate event that would bring together providers, payers, and business partners similarly to our national level events on a local scale, where

relationships and processes can come together in an actionable way. Our board set out to accomplish a mountainous feat, create a brand-new series of events geared towards all members and transform our existing winter conference. From these needs birthed a new “SWO Book Club” series and our first ever “Denials Bootcamp.”

**Goals and Objectives:**

- The primary goal of the Denials Bootcamp was to bring together participation from providers, payers, and business partners in a collaborative and engaging discussion that would help foster real working relationships.
- The objective for our book club event series was to increase participation with first time attendees by offering relatable content in an innovative method.

**Methodology:**

- Created an all-day denials bootcamp conference that would be well attended by providers, payers, and business partners.
  - oHosted event at the Newport Aquarium – A unique and accommodating space that would draw interest from all attendees. This also included an interactive activity with a visit from Kit Kat, an endangered baby crocodile.
  - oOrganized two panel discussions to bring insights and education.
    - Payer Panel including representation from Caresource and Buckeye Health and moderated by HFMA’s own Shawn Stack
    - Provider Panel including four local provider executives in the denials space accompanied by a business partner specializing in denials management.
  - oPresented an overview of the current political landscape and advocacy efforts with Emma Cardone from the Ohio Hospital Association
  - oLeveraged business partner expertise to provide denials prevention methodologies.
- Created a new event series open to all members to attend virtually, during the lunch hours, in for form of a book club.
  - oAttendees were provided 60-day notice of the book, whitepaper, or video to review prior to the book club discussion.
    - oThe inaugural book club discussion was hosted by one of our enterprise member organizations. The moderator for the discussion was the Chief Diversity Officer for the enterprise organization. The book discussion centered around “35 Dumb Things Well-Intended People Say: Surprising Things We Say That Widen the Diversity Gap” by Maura Cullen.
    - oThe second book club was hosted by an enterprise member organization as well. This was a discussion around a Ted Talk by Brené Brown titled “The Power of Vulnerability.”
    - oThere will be two more book club discussions also hosted by enterprise member organizations this year.

**Evaluation and Results:**

- Our inaugural denials bootcamp has 101 registered attendees with an attendance ratio of: 50% provider and 50% business partner.
- Our first book club event had over 80 registered attendees, of which 25% were first time attendees to any HFMA event.
- Our second book club event had over 90 registered attendees, with over a 50% return rate from the first book club attendees. The participation from the attendees was unlike any other virtual event with 100% of attendees contributing to the discussion.

- Comments from our denials bootcamp included:
  - o “This was the most engaging and productive education day I have participated in for a local chapter.”
  - o “The ability to bring payers, business partners, and providers together in such a collaborative environment was groundbreaking.”
- Comments from our book clubs included:
  - o “I really appreciate the creation of this safe environment to be vulnerable and lean on each other as leaders and learners.”
  - o “This discussion has given me a new avenue to re-engage with the chapter and I am now looking forward to participating more.”
  - o “I am impressed with the chapters willingness to address topics of DEI and vulnerability in such a progressive way with moderators that make the discussion accessible, inclusive, and judgment-free.”
- We have had over 10 new volunteers express interest and ultimately join a committee for our local chapter after attending our first book club session.

The Southwestern Ohio chapter not only met but exceeded expectations in delivering Best Value, Best Engagement, and Innovation. The creation of these two new event opportunities for our members reflects our team’s ability to look at the specific needs of our local members and translate those needs into new and innovative concepts. The denials bootcamp has the potential to be an annual event, given the feedback received from members. The book club can be scaled up to apply to future multi-chapter and regional events and has garnered the highest new member participation of any event in our chapter’s history.

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**Chapter Name:** Region 10

**Submission Type:** Region

**Award Title:** Region 10 Lunch and Learn Webinars

**Submission Summary:** We had a new innovative educational offering for Region 10. It is difficult for one chapter to get attendance for the webinars. So with the collaboration of the chapters for region 10 we were able to provide monthly educational lunch and learn webinars for all region 10 members.

**Needs Identification:**

Discussion at a Region 10 meeting in 2023 at Western Region Symposium we talked about how to be more innovative with our members and what would that look like. It is a lot of work to put on a webinar and so we came up with the new idea of creating a Region 10 Webinar series, monthly.

**Goals and Objectives:**

Get more members involved in attending webinars by sharing the topic and speaker across our region 10 chapters. If this is successful we will continue this for the following year.

1. Get more attendance in the webinars.
2. Provide more value by increasing educational opportunities for our members by sharing speakers. Also, providing a wider range of topics.

3. Each chapter in the region gets the opportunity to host. (Finding the speaker, completing the google sheet, CVENT setup, and hosting live on the webinar)

4. Make it free for members to attend and do it during their lunch hour.

Starting in June 2023 through May 2024 we were going to provide a CPE/educational webinar for the region. We would review the registrations and attendance for each Region 10 webinar to determine if we would continue this or not in the subsequent years.

#### **Evaluation and Results:**

I will be using Idaho as an example to show the results for the two months we host/hosted (November 2023 and May 2024).

Reviewing Novembers registrations was 215! In the past our chapter would get a handful of registrants so we stopped providing them.

For the May Lunch and Learn Idaho is hosting, with registration only open for two days, we have already 69 registrations!

As a Region we never anticipated this kind of participation and it is incredible. We will continue this opportunity for the following year to continue to engage and provide value to our region 10 members!

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#### **VALUE CATEGORY**

**Chapter Name:** Tennessee

**Submission Type:** Chapter

**Award Title:** Tennessee Roadshows Sweep The State with Value

**Submission Summary:** The TN Chapter made strides to revamp a stale conference and created free Roadshows for Providers, Students/Professors, and Chapter Sponsors. These roadshows had the highest Provider to Business Partner Ratio, highest satisfaction scores, and largest net revenue in the History of the Chapter.

#### **Needs Identification:**

Pre and Post Covid, the TN Chapter hosted an annual Spring conference in Nashville that consistently had negative margins affecting our bottom line. In Spring of 2019, our Institute lost a total of \$14,722.29. In Spring of 2021 (No Conference in 2020 during Covid) our Institute lost a total of \$15,914.83. We did not have a Spring Institute in 2022 as the TN Chapter hosted the Region 5 Southeastern Summit in February of 2022 in Nashville and chose to forego the event. The continual monetary failures of our Spring Conference hit even harder as we were no longer receiving yearly Member Rebate Checks (over \$12K per year) from the National Association, which normally gave us a buffer to cover our losses from the event. Not only was Revenue down, but attendance was predominately heavy with more Business Partners than Providers, and we were receiving negative feedback from our attendees. Spring of 2019 our Business Partners made up 72.4% (76 people) of the attendees and Providers were 27.6% (29 people). In Spring of 2021 Business Partners made up 69.5% (114 people) of attendees, Providers 29.9% (49 People) and Students 0.6% (1 person). As you can see, our business partners saw very little value in attending the conferences due to the limited number of providers and overcrowding of vendors. It was determined that there was no real value of our Spring Institutes to providers or sponsors anymore and more importantly we could no longer continue to afford massive financial losses.

The Chapter came together in a board meeting during 2022 and realized that as a Financial Association we cannot continue to put on events that are losing money. We needed to have fiscal responsibility and consciousness when hosting events. We became determined to find a way to revamp not only the educational content, but also the outreach to our audience type while at the same time maintaining sponsor and provider satisfaction.

The Chapter decided to put together a small committee looking for a way to increase the value of the revenue, education content, attendance, and overall satisfaction.

#### **Goals and Objectives:**

The Committee created by the Board set lofty yet maintainable goals all of which were measurable to ensure that we can track our success increasing value on multiple levels. The Chapter determined our goals and wanted to increase the overall value of our events across the board. The goals we outlined were:

1. Positively Impact Chapter Financials by significantly increasing Net Revenue and decreasing Expenses
2. Host multiple events across the state in key target markets
3. Provide education material with valuable content relatable to all departments involved in Revenue Cycle
4. Increase New Chapter Sponsorship and Maintain Sponsor Satisfaction/Value
5. Limit Provider Distraction and hesitation of coming to the event by limiting access thus increasing the Provider to Business Partner Ratio

#### **Methodology:**

As a Financial organization we knew it to be certain that we needed to Increase Net Revenue by strategically planning our events to be cost effective. The biggest costs of any event historically are Facility and Food. We were able to eliminate the Facility Cost of each Roadshow by deciding to host our events on site at local Hospitals throughout the state. We had four target markets in the state, Chattanooga, Knoxville, Memphis, and Nashville. We chose these locations as they are the most populated areas of the state with the highest healthcare presence.

Chattanooga: Erlanger Health

Knoxville: University of Tennessee Medical Center

Memphis: Baptist Memorial Hospital

Nashville: Lipscomb University at The Shinn Center

The next highest cost for events is food. We decided to have the events from 1-5 PM so there was no cost of lunch and was limited to snacks and drinks. Each Hospital/Facility graciously allowed us to bring the food/drinks ourselves. We reduced costs by buying soda/water and chips from Sam's Club rather than overpriced hotel food. We still felt it was important and necessary to have a networking event for the attendees. While we knew the small happy hour/networking post-show would be the largest cost, we efficiently placed food orders to maximize our budget while still maintaining high satisfaction, which you will see reflected in the evaluation and results.

Additionally, we aimed to offer quality education to Providers without the interference of Business Partners solely seeking business opportunities and lacking support for the Chapter. Consequently, attendance at the event was restricted to Providers, Students/Professors, and TN Chapter Sponsors. We took a calculated risk by setting the registration cost at \$0 for everyone, aiming to boost Provider attendance while anticipating recouping expenses through event sponsorship, as detailed in the following paragraph. Chapter Sponsors were permitted to send only one representative to each show

unless they opted to become event sponsors, providing them with added value by allowing attendance at four events for no additional cost. We communicated this strategy to all current sponsors via email and encountered no objections to the limit. Any Business Partner not aligned with TN Chapter Sponsorship was ineligible to attend, further aligning with our goal of bolstering Chapter Sponsorship overall.

To cover food costs and maintain profitability, we offered three event sponsorships per location at a price of \$2500 per sponsorship. In 2023, we made an exception and charged one group \$1250, a decision approved by the board. Sponsorship benefits included badge signage, visibility on the main screen during presentations, and the opportunity to speak before each session. While Chapter Sponsors were restricted to one attendee, Event Sponsors were allowed up to three attendees, though most opted for one or two.

The Provider to Business Partner Ratio presents a significant challenge for all Chapters. It is crucial for our Business Partners to feel they have exclusive access to their clients or prospects, while Providers must not be overwhelmed by sales pitches, ensuring an enjoyable conference experience and fostering continued attendance. The registration restrictions mentioned above were designed to significantly improve this ratio, pleasing both parties, as evidenced by the success detailed in our results.

To enhance the value of our content and attract Providers who typically did not attend HFMA shows, we recognized the need to diversify our standard revenue cycle education material. These events were open to Non-HFMA providers, including members from Patient Access and other Non-Finance Departments, with the aim of broadening participation. Each roadshow featured three sessions, all offering three CPE credits, covering topics such as Executive Briefings, motivational speaking for career enhancement, and relevant subjects like AI. The Executive Briefings, conducted in interview style panels with C-Suite level individuals from local facilities/hospitals, provided attendees direct access to healthcare executives, fostering valuable connections that might otherwise be inaccessible.

Finally, in anticipation of future leadership, we developed the Kelly Miller Roadshow Playbook to guide event planning before, during, and after each event. This resource is now accessible on the TN Chapter's shared Google Drive (see attached playbook), ensuring continuity and providing invaluable guidance for future organizers.

#### **Evaluation and Results:**

**Financial Evaluation:** In 2023 we had 4 roadshows in Chattanooga, Knoxville, Memphis, and Nashville. Overall, our Revenue was \$21,250 and Expenses were \$7,731.49. We had a total of 8 Sponsors for \$2500, and one sponsor that we allowed to have a discounted rate due of \$1250 due to special circumstances. Total Net Revenue of \$13,518.51. This is an overall positive swing of \$29,433.34 from our last Spring Event in 2021 which lost \$15,914.83. Food Costs from our Spring 2019 Institute were \$11,900.75. Food Costs from all 4 road shows in 2023 combined were \$3,321.75. (See Attachment "TN Chapter Final KMRS SI Revenue Expense Data").

**Attendee Outcomes:** All Four shows combined in 2023 we had a total of 52 Providers and 41 Business Partners and 1 Professor attend these events. That is 55.3% Providers, 43.6% & Business Partners and 1.1% Professors. In Spring of 2019 there were only 27% attendees that were providers. This is over a 25% increase of the Provider attendance ratio from our Spring events in both 2019 and 2021.

As we mentioned in our Methodology and Goals, we wanted to create an event that brought education to those outside of the standard finance or typical revenue cycle departments you see at conferences. The provider attendee titles from the conference included people with titles like: Patient Access, Coding Team Lead, Associate General Counsel, and even a surgeon! A majority of the attendees were first time HFMA attendees as well.

Our Chapter and Event Sponsors were very appreciative of the intimate setting feel and greater than 1:1 ratio of Providers to Business Partners. This allowed them to spend more time with their clients or prospective clients engaging

in meaningful conversation. VisiQuate, a sponsor from the Knoxville Roadshow, stated, "This event was fantastic, I never had the opportunity to meet our client (UT) in person, and this allowed us to spend the day with them and with the other local Knoxville facilities without the distraction of large crowds."

Seeing such great success in 2023 we decided to continue these events for 2024. With even more proper planning months ahead of schedule, we were able to replicate our success from 2023 and are already producing greater results in 2024 both for attendance and sponsorships. We have already secured 10 Event Sponsorships for all 3 events (Chattanooga, Knoxville, and Nashville) totaling \$25,000 in revenue.

For the 23-24 Fiscal Year we also saw a dramatic increase in First Time Chapter Sponsorship so that people could attend the roadshows as well. There was an increase of 5 new Bronze Chapter Sponsors (\$1500 each) totaling \$7,500 in Chapter Sponsorship Revenue, which we normally would not have received.

The Chattanooga Event occurred on 2/8/24 with a total of 43 (32 Providers & 11 Business Partners) people compared to 35 (26 Providers & 9 Business Partners) in 2023. The increase in attendance was 6 providers and 2 Business Partners.

In 2023, our Knoxville Registration totals were 25 people (15 Providers & 10 Business Partners). This year our event is scheduled on 3/7/24, and has 36 people registered (21 Providers & 15 Business Partners). This is a 44% increase of attendees because of our strategic marketing and planning.

Current Registration for our Nashville KMRS, on May 21, and registration is already at 26 people with over 2 months to go. This is almost a 50% increase from last year. With Enterprise Outreach and promotion, we are anticipating registration to surpass 60 people, and our stretch goal is over 100 people.

The value of our Spring Conference has been such a financial, engagement, and attendee success, we plan to make the Kelly Miller Road Shows an annual event for years to come!

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**Region Name:** Regions 10 & 11

**Submission Type:** Multi-Region

**Award Title:** Western Region Collaboration & Alignment

**Submission Summary:** Region 10 & 11 Alignment in all things. During the pandemic, and One HFMA restructure the Western Region would be a main source of revenue for 14 Chapters. Regional Executives came together to align both regions to have the same incentives and operating structure to insure a cohesive partnership.

**Needs Identification:**

It was apparent that the Western Region Symposium would now be a main source of revenue with both Regions. Being that Region 11 was still the Region with all voting power and financial controls, were forced to look at if the partnership was still a value. It was apparent that there was much area for improvement from Region 10 to bring to the partnership. Both Regions were not operating under the same assumptions and standards.

Region 11 asked Region 10 to follow the Operating agreement for WRS as Region 11 and use the same rotation of Chapter leads as Region 11. Region 11 also asked Region 10 to follow the same incentives to the Chapters as Region 11.

The Western Region Symposium was not seeing the attendance from Region 10, nor the volunteerism from Region 10 to sustain the relationship. By aligning in all areas, our communications to our Core Volunteers, Presidents and Membership would be consistent throughout.

The need to communicate to Region 10 leadership that alignment was the only way to gain more equity in the WRS decisions and revenue distributions.

Region 10 Regional Executives needed to mirror Region 11's operating agreement and educate their Chapters as if they were starting from scratch. They needed to have a Chapter lead rotation to match Region 11. They would need to incentivize their Chapters on participation and attendance to WRS.

#### **Goals and Objectives:**

Our Goals and objectives, were set to align Region 10 to mirror Region 11 in every way.

We set out to get this underway before 2023 WRS. We needed to do this to build momentum not only with our Regional leadership but with the membership throughout Region 10 and 11. We set out to reach pre-pandemic attendance numbers, make a profit and grow our volunteer base.

Regions speaking the same language and beat to the same drum. We needed to bring our Regions together in every way possible, such as networking and team building opportunities. We set out to really be ONE.

Region 10 goals is to have more equity in WRS, with more say, decision making and possibly more revenue share.

#### **Methodology:**

Region 10 mirrored Region 11's operating agreement. The Regional Executives met regularly to clarify and educate one another. Region 10 met with their Chapter Leaders at great length utilizing every opportunity to do so. Region 10 provided a rotation of the their lead Chapters to match with Region 11's rotations. This rotation was added to the operating agreement. They followed Region 11 incentives for chapter distributions based on participation and attendance.

Both Regions took advantage of joint networking and team building opportunities. We did T-Shirts, we did chants, we did TikToks, and participated in joint events together. We worked hard to become really ONE Western Region. Both RE's included the RE2's and 3's in every step, understanding that it would take three years to prove this out. We needed to show that 2023 and 2024 WRS we were united on all fronts. We would continue to build momentum and grow our conference and continue to be the second largest to the HFMA Annual Conference and be profitable.

#### **Evaluation and Results:**

2023 was our first WRS implementing this is alignment. We had come into this with such momentum and cohesiveness. Region 10 lead Chapter was Colorado and Region 11 was Northern California with shadow Chapter for Region 10 Montana, and Region 11 being Nevada.

Lead Chapter Colorado had Sponsorship and Keynote and Lead Chapter Northern California had Education and Provider Outreach. The shadow Chapters would co-chair the opposite region as they would rotate every year as listed in the operating agreement.

January 2023 would see PRE-PANDEMIC numbers of attendance with outstanding Provider attendance, even bringing in other regions. Profits and momentum were bursting excitement. January 2024 couldn't get started soon enough with the same momentum!

January 2024 proved to be another success with satisfying numbers! Final profits not in just yet but Sponsorship sold out. 2023 total 885 attendees and 2024 total 904 attendees.

Total Sponsorship \$ Ordered \$	676,350.00
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2023 Sponsorship Goal (based on budget) \$ 594,100.00

% to Sponsorship Goal 114%

Total Sponsorship \$ Available \$ 648,600.00

a.Registration

2024 Registered2024 Attended2023 Registered2023

Attended

Total 951904946885

Providers278265395270

Business Partners673639551615

Provider %29%29%42%31%

January 2025 WRS is well under way and confident the momentum to grow as One WRS with both regions are set to make new records. With this alignment WRS has really become one. New ideas, new volunteerism, thought leadership, new ways to engagement, Provider think-tanks and collaboration has developed. 2025 this will be re-evaluated by the original RE3's engaged in 2022 to propose a more permanent union and equity.