

HFMA Digital Support

June 2022

Overview

1. Project Background and Description

There are endless possibilities when it comes to ways the Association could support the chapters and regions and various feedback has been shared informally over the past few years. However, without having a formal pulse on the needed support, it was difficult to move forward with any set plans. Over the last 12-18 months the Association has been documenting needs based on conversations with chapter volunteers and the Regional Executive Council. The common needs that bubbled to the top included technology as well as websites (design, maintenance, and lack of expertise). Several polls at Fall Presidents Meeting 2020 validated the need for digital support.

HFMA shifted quickly to properly align resources. Discovery began in June 2020 with pilots and feedback from the Regional Executive Council and National Board of Directors. The overarching theme that was heard was that it is imperative to invest in resources as ONE HFMA.

A collaborative support model—rather than a support method, provides the best approach to member experience and increases effective delivery while developing a more educated team of support agents. Instead of simply transferring knowledge and training year after year, the collaborative support team provides high quality, consistent branding and continues to deliver new solutions to improve the chapter services. Although all solutions are not yet known, by working closely with the chapters and regions this will provide the Association a closer view into the role of the volunteer and inform all parties of the challenges and opportunities. By creating broad solutions for all chapters and regions this creates the most consistent member experience.

Saving volunteer time and ensuring a better volunteer experience, collaborative support reduces duplication of effort and redundancies. This gives chapter leaders more time to focus on innovation, collaboration and increase value for members. The collaborative support team will improve overall efficiency and eventually provide preferred pricing. By assigning processes to the Collaborative Support Team, the volunteer is guaranteed to have consistent experience, thus having more time to concentrate on member needs and chapter operations. This is how we accomplish ONE HFMA.

2. Project Scope

- ❖ Webinars (events spanning 1-4 hours) – limited to 12 webinars annually
 - Pre-Conference
 - Request support through [this form](#)
 - Event creation in Cvent
 - Sessions
 - Speakers
 - Registration
 - Event Webpage
 - Canva graphic creation (for social media/Save the Date)
 - Communication with attendees through Cvent
- Save the Date
- Invitation

- Registration Confirmation
- Event Reminder
 - Zoom creation
 - Calendar invite with speaker links
- Day of Support
 - Technology Support for Speaker Orientation 15-30 minutes prior to webinar
 - Association will join webinar for Speaker Orientation and then will hand off the Zoom host responsibilities to a Chapter Leader. Association will not stay on for the webinar itself.
- Post Conference
 - Send Cvent feedback survey (if requested)
 - Create Certificate of Attendance (if requested) and distribute upon Cvent feedback survey completion
 - Recordings (if requested)
 - Attendee List to Chapter Event Coordinator (if applicable)
- ❖ Digital Events (events with multiple sessions, spanning 4+ hours) – limited to three events annually
 - Pre-Conference
 - Request support through [this form](#)
 - Chapter Event Coordinator (Communication with HFMA)
 - Event Planning Calls (TBD by Event Coordinators)
 - Event creation in Cvent
 - Sessions
 - Speakers
 - Registration
 - Event Webpage
 - Development of Roles and Responsibilities
 - Canva graphic creation (for social media/Save the Date)
 - Communication with attendees through Cvent
 - Save the Date
 - Invitation
 - Registration Confirmation
 - Event Reminder
 - Recording or pre-recording of sessions (*one or the other*)
 - Create Opening Slide Deck for Sponsor recognition
 - Zoom creation
 - Calendar invite with speaker links
 - Networking Creation (including but not limited to Mentimeter)
 - Crowd Compass creation (app cost not included)
 - Technology support for sponsors
 - Day of Support
 - Execute Roles and Responsibilities
 - Technology Support for Speaker Orientation
 - Operate Videos, Open Slide Deck and Pre-recorded Sessions
 - If Needed:
 - Attendee List to Chapter Event Coordinator (if applicable)
 - Assist with Q&A and Chat
 - Assistance with Networking Events

- Technical Assistance
- Post Conference
 - Send Cvent feedback survey (if requested)
 - Create Certificate of Attendance (if requested) and distribute upon Cvent feedback survey completion
 - Recordings (if requested)
 - Attendee List to Chapter Event Coordinator (if applicable)
 - Wrap Up Event Call (TBD by Event Coordinators)
 - Add presentations and recordings to Chapter website (if applicable)
- ❖ In-Person/Hybrid* Events
- Pre-Conference
 - Event creation in Cvent
 - Sessions
 - Speakers
 - Registration
 - Event Webpage
 - Hotel/Travel
 - Discount codes
 - Communication to attendees through Cvent
 - Save the Date
 - Invitation
 - Registration Confirmation
 - Event Reminder
 - Crowd Compass creation (app cost not included)
 - Contract review assistance (event venue, speaker agreement)
 - OnArrival assistance
 - Zoom Creation (Hybrid Events*)
 - Send calendar invite with contact links
 - Day Of Support (Hybrid Events*)
 - Technology Support testing scheduled for no more than 30-minutes
 - Association will join event for A/V check only, then the Association will turn over control to a Chapter Leader for the duration of the event.
- Post Conference
 - Cvent feedback survey
 - Create Certificate of Attendance/CPE Certificate (if requested)
 - Add presentations/recordings to Chapter website (if requested)
 - Attendee List to Chapter Event Coordinator (if applicable)
- ❖ Annual/Event Sponsorship & Exhibit Creation – Limited to 4
- ❖ Networking/Social Event Set Up??
 - Golf Tournaments??
- ❖ Additional Marketing & Communications through Cvent – Communications can be sent to the chapter's members on an as-needed basis and can be pre-scheduled to be sent on a cadence determined by the chapter/region. All content to be provided by the chapter. This only applies to events.
- ❖ Website

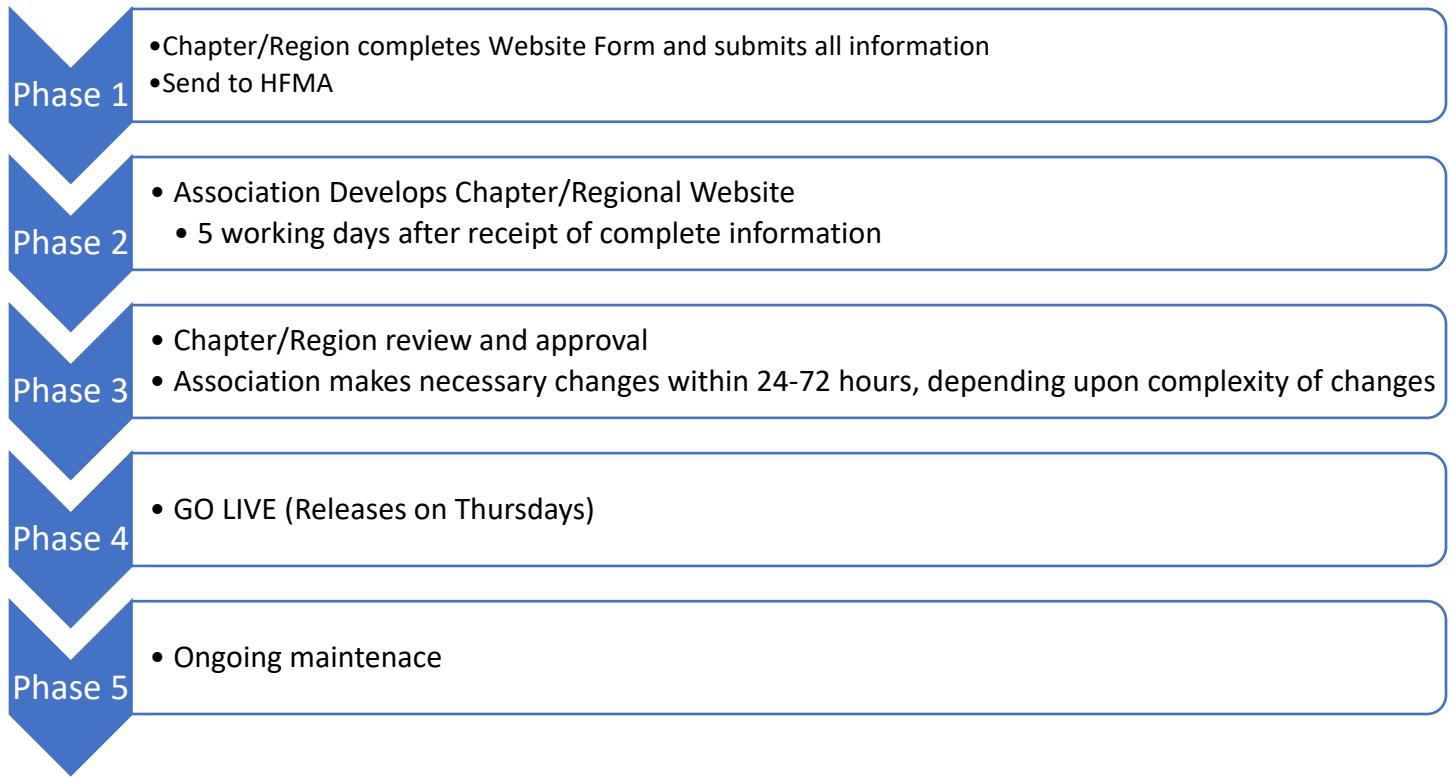
- Creation of website
- Website updates – Chapter can request website updates through [this form](#)

Standards of Service

3. Chapter/Regional Website Requirements and Deliverables

The websites are all built using a standard template of pages to ensure a consistent member experience. Those pages include the following: Chapter/Region Home, Events, Leadership, Sponsorships and About the Chapter/Region. Information that is typically included on each tab includes the following:

- Chapter/Region Home: President's Welcome (or Regional Executive Welcome if Regional website), up to three featured items (for example, job bank, volunteer opportunities, featured event)
- Events: any upcoming chapter or regional events
- Leadership: your chapter or regional leadership team
- Sponsorships: your sponsor logos are featured by sponsor level and any information on your sponsorship program can be included
- About the Chapter/Region: any information you would like to share about your chapter or region, such as membership, volunteer opportunities, and contact information
- All pages of the website will include social media links on the left-hand side (LinkedIn, Facebook, Twitter, etc.)
- Other pages can be added upon request



Ongoing maintenance

- After your website is launched, [use this form](#) to request updates.
- Changes are made in production so are updated real-time. Most updates will be made within 72 hours of receipt of the submission form. The caveat to that is non-standard requests such as those that would

require a website enhancement to accommodate. Minor updates such as a wording change will be accommodated in less than 72 hours.

- Updates are made on a first come, first served basis. If there is an emergent update that arises, that will be handled on a case by case basis. You can denote critical updates within the form.

4. Event Support Requirements and Deliverables

Digital support requires close collaboration between the Association and the chapter/region. To ensure successful rollout of the digital event, the following expectations must be met by the parties involved. It is imperative that all parties take a fair and reasonable approach to digital support. **If deadlines are not met, support is not guaranteed.**

Chapter/Region

- Committed team of volunteers, including 1-2 point people that the Association will work with when questions come in from members related to the event.
- Commitment to meet weekly or bi-weekly to plan the event (this can be already scheduled program meetings; the Association doesn't need to be added to these unless requested).
- **Provide notice of an upcoming in-person/hybrid conference at least 120 days prior, digital conference at least 60 days prior, and a webinar at least 30 days prior.**
 - A webinar would be defined as a one session event, typically 60-90 minutes long. *Please note, if you plan to use the Association's Zoom license, this is on a first come, first serve basis so the farther out you can provide notice, the better.*
 - A digital conference would be defined as a multi-session virtual event, typically 3+ hours long. *Please note, if you plan to use the Association's Zoom license, this is on a first come, first serve basis so the farther out you can provide notice, the better.*
 - Notice is provided through the completion of [this form](#).
- For digital conferences, the following must be provided at least **45 days prior** to the event:
 - The date and time of the event and corresponding sessions must be solidified. It is the responsibility of the chapter to work with speakers to determine availability and timing.
 - All speaker details (bio, photo, etc.) – details will be submitted via this form
 - It is the responsibility of the chapter to follow up with speakers regarding any needed information.
 - All session details – details will be submitted via this form
 - All sponsor details – details will be submitted via this form
 - Sponsor information is only needed if the chapter/region has requested a Crowd Compass build.
 - It is the responsibility of the chapter to follow up with sponsors regarding any needed information.
 - Any sponsorship package specific to the event that needs to be set up in Cvent – details surrounding the sponsorship must be provided including pricing, tiers, benefits, timeline, etc.
 - Any networking event support needed by the Association (use of Mentimeter, etc.)
 - Pricing structure for the event and accepted methods of payment
 - A decision must be made regarding the need to pre-record sessions or record day-of. If pre-recording, this must be completed 15 days prior to the event.
 - Pre-recording Guidelines are as follows:
 - When scheduling speakers for a recording session, all speakers (and people doing the intro/closing if applicable) for that session should be included in the

recording session. This not only ensures the recording flows better and is less choppy but it also saves time with editing. It also helps you stick with your allotted time for sessions.

- When scheduling recording sessions, please include the Association so we can also provide our availability (and ensure availability of our Zoom account). We have found that using a Doodle poll works well to get everyone's availability without emailing back and forth.
- For webinars, the following must be provided at least **30 days prior** to the event:
 - The date and time of the webinar must be solidified. It is the responsibility of the chapter to work with speakers to determine availability and timing.
 - All speaker details (bio, photo, etc.) – details will be submitted via this form
 - It is the responsibility of the chapter to follow up with speakers regarding any needed information.
 - All session details – details will be submitted via this form
 - Pricing structure for the event and accepted methods of payment
- For all digital events, the following must be decided upon at least **15 days prior** to the event:
 - Chapter/Regional roles for day of the event (for digital conferences the Association will provide a Roles & Responsibilities spreadsheet for the chapter/region to assist in filling out)
 - Cvent communication to attendees
 - Reminder emails
 - Survey emails
 - If doing a scavenger hunt through Crowd Compass or Mentimeter, all scavenger hunt questions must be submitted to the Association to complete the scavenger hunt build.
 - If doing trivia through Mentimeter, all trivia questions must be submitted to the Association to complete the trivia build.
 - If pre-recording sessions, recordings must be completed by this time to allow the Association to do any needed editing.
 - If a Certificate of Attendance is needed the chapter must supply all relevant information (number of CEU, CPE or type of NASBA credit).

Association (*all timelines displayed assume chapter/region has provided materials within their specified timelines*. If additional information is provided after an event is closed, the Association will work with the chapter/region on a per case basis to see if the work can be completed.)

- Commitment to attend chapter/region's weekly or bi-weekly program planning calls, when requested
 - If unable to attend calls, commitment to provide updates on progress
- If all requested webinar or conference materials provided within specified timelines, commitment to have Cvent registration live within one week of receiving the information Any associated sponsorship package would also be live within 40 days of conference. *Please note, if the chapter/region submits all information prior to the required timeline, the Association will commit to having registration live within one week of receiving information.*
- *After Cvent registration goes live, the Association will make any necessary updates to registration process/website once per week.*
- If requested, the Association will review event site contracts. Contract review will be complete within 14 days of request.

- If requested, the Association will provide a graphic that can be used in social media promotion of event.
- If requested, 30 days prior to a digital conference, the Association will provide a draft Roles & Responsibilities spreadsheet for the chapter/region to assist in filling out.
- If requested, the Association will create all Zoom links at least 40 days prior to a digital conference and at least 25 days prior to a webinar (assuming all needed information received from chapter/region).
- If requested, the Association will create an opening slide deck to recognize sponsors (all sponsor information must be provided at least 15 days prior to event).
- If requested, the Association will create Crowd Compass (separate charge for Crowd Compass) and have it ready at least 5 days prior to the event (assuming all needed information received from chapter/region). *Please note, the Association will only assist with app population for Crowd Compass and SpotMe. If a chapter elects to use an alternative conference app, the chapter is responsible for populating all event information in the app.*
- If requested, the Association will send event reminders and/or other communications to the event attendees via Cvent at a cadence provided by the chapter/region. *Please note, it is a best practice for the chapter/region to also send at least one communication to the attendees via their own email account if worried about spam filters.*
- If requested, the Association will run Zoom during the event and assist in answering any technical questions that come into the chat. The chapter/region should designate one volunteer to assist in answering any content questions that are asked in the chat.
- If requested, the Association will assist in checking mics/video for speakers 15 minutes prior to each session. *Please note, this only applies when using Zoom Webinar. If Zoom Meeting is used or one Zoom is set up for the entire day's sessions, all speaker mic/video checks must be completed at the start of the day.*
- If requested, the Association will pull a final list of registrants from Cvent and send to the chapter/region's designated event coordinator within 24 hours of the event. It will be up to the chapter to send that list on to any sponsors that request such information.
- The Association will send the event survey from Cvent to all registrants within 24 hours of the event's conclusion. *Please note, if the chapter/region specifies they'd like the feedback survey to go to a different audience (i.e., attendees, those that answered polls), this will take longer than 24 hours.*
- If requested, the Association will create a Certificate of Attendance and distribute upon Cvent feedback survey completion. The information will be supplied by the chapter.
- If requested, the Association will record the sessions and provide the recordings to the chapter/region within 5 business days of the event's conclusion.
- If requested, the Association will post event recordings/presentations to the Chapter website.
- If requested, the Association will assist in scheduling a post-event wrap up call.

5. Specific Exclusions from Scope

In-person event support is excluded aside from the Cvent registration, Crowd Compass and contract review support listed in the Project Scope.

Full support is limited to 12 webinars per chapter/region and three digital events annually. If a chapter/region exceeds that number, the Association will still help with Cvent registration for the overflow events.

Strategy

6. Implementation Plan



Implementation of the Digital Support Model can be unique to each chapter/region depending upon their event schedule and any other upcoming activities. It is recommended to go live with the website during a time that the chapter/region does not have already scheduled events to make the transition easier on members and volunteers. Please note, the transition to the website can occur over many weeks or months if the chapter/region prefers to submit information piecemeal overtime. The go live date will be determined based on the chapter's/region's readiness. Support for digital events can occur over time and may begin with the chapter/region only utilizing the Association support for Cvent setup. It is highly recommended that chapter/regions at least utilize the Association for Cvent support so that a uniform registration process, including uniform dataset, can be created. This will help create the vision of ONE HFMA.

7. High-Level Timeline/Schedule

All chapters/regions will be transitioned to the Digital Support Model by May 31, 2022 unless a waiver has been approved. Chapters/regions can begin transitioning to this model any time during this period.