



2023 Success Award Winning Submissions

ENGAGEMENT CATEGORY

Chapter Name: North Carolina

Submission Type: Chapter

Award Title: NCHFMA's revamped social media communication plan delivers value to membership

Submission Summary: In today's increasingly work-from-home environment, social media connection is more important than ever. That is why the NC Chapter made it a priority to increase engagement with our Chapter members and provide meaningful content through the strategic use of social media platforms.

Needs Identification:

According to the Global Web Index, the average person spends more than two hours each day on social media, and today's healthcare leaders are using these platforms more than ever to grow their professional networks and stay abreast of relevant topics in our industry.

Historically, NCHFMA utilized LinkedIn, Facebook, and Twitter to disseminate information to membership; however, social media usage was sporadic and engagement was low. NCHFMA leadership identified an opportunity to grow our online presence and increase member engagement by ramping up social media usage and creating a plan to be more strategic in our approach. We made a concerted effort to research what other Chapters were doing with their social media accounts and subsequently created a strategic plan with distinct goals and objectives to better connect and engage with our members.

Goals and Objectives:

The overall objective for this refreshed social media plan was to provide value to our membership. We define "value" as making sure our members are aware of everything going on in our Chapter so they can take advantage of all the things HFMA has to offer including educational opportunities (both in-person and virtual), networking events, relevant healthcare news, etc.

We began this initiative by setting three distinct goals:

1. Gain new followers on social media;
2. Increase engagement from existing followers on social media;
3. And provide a regular cadence for new posts to engage members with more meaningful content.

Methodology:

In order to achieve our goals, we knew it would not be enough to simply post more on our existing social media accounts. We needed to develop a plan to reach our members on the right platforms, at the right times, with the right content.

Step one: Determine which social media platforms were best for reaching our members.

- LinkedIn: It was easy to determine that LinkedIn is the preferred platform for our members. LinkedIn is the professional social networking site of choice in our industry, and we already had a 420 followers on our LinkedIn page.



- Facebook: We had a much smaller following on Facebook, which makes sense as it is mostly utilized as a personal socialization platform; however, we determined that there was significant opportunity to better use Facebook and engage with our members in a more personal/ less formal manner.
- Instagram: NCHFMA did not previously have an Instagram account. Like Facebook, Instagram is utilized more for personal use. That being said, we recognized that other Chapters were successfully utilizing Instagram and we wanted to make sure we were covering all of our bases. We created a brand new NCHFMA Instagram account of which engagement has grown significantly in a very short amount of time. Instagram provides us with a more informal way to engage membership and promote a sense of community.
- Twitter: We quickly determined that Twitter was not providing value to our members. Very few of our members are on the Twitter platform, so we made a deliberate decision not to include Twitter in our on-going social media plan.
- Other: The Communications Counsel also discussed the possibility of using TikTok; however, we made the decision not to proceed based on member feedback. That being said, we are open to using it in the future.

Once we determined which platforms we wanted to proceed with the next step was figuring out how to get people to follow us who were not already doing so. One example of how we gained followers was through a focused social media push at our 2022 spring conference in Pinehurst, NC. We created QR codes for each platform and printed flyers for each attendee with details on where they could follow us online. We also promoted a Social Media Contest at this event where the winner received a free registration to our Summer event in Myrtle Beach, SC. There were two ways to win:

- 1.Attendees could get their name in a drawing when they posted on one of our social media accounts using our distinct hashtag: “NCHFMAtakesPinehurst” (more posts = more chances to win).
- 2.If they were not following us already, attendees could also get their name in the drawing by following NCHFMA on our three platforms before the end of the conference.

Please refer to Attachment 4, “Social Media Contest” to see the flyer from this contest (which was also printed and displayed throughout the event space). The contest was a smashing success, and we saw a significant increase in followers after the event.

Step two: Develop a social media calendar

Based on research, it was decided we needed a social media content calendar to us help us stay organized and consistent with our posting. We knew we had to provide a regular cadence for posting new content to reach our goals, and creating a content calendar allowed us to strategize upcoming content and maintain consistency across our various platforms. At a minimum, we post twice per week on LinkedIn, weekly on Facebook, and monthly on Instagram.

Please refer to Attachment 1, “Content Calendar”, for a snapshot of the most recent month’s content calendar.

We also utilize the free analytics tools available to us on these platforms to help determine optimal days/times for posting for maximum engagement (refer page 2 on Attachment 2, “Results and Analytics”, for a sample of the analytics used across all three platforms).

Step three: Deliver better, more meaningful content to increase followers and engagement

Once we confirmed which social media platforms we wanted to utilize and developed a content calendar to keep us on track, the next step was finding out what kind of content we wanted to disseminate. We reviewed past posts as well as posts from other Chapters to learn what was getting the most likes/views/shares and what would bring the most value to our members. By creating improved, more meaningful content, we aimed to increase engagement and grow our



followers online.

Below are examples of the content we came up with to meet our goals:

- Educational event promotion: We purposefully planned posts around scheduled education events (both in-person and virtual) to drive up registration and promote corporate sponsorship. For each in-person event, we developed the following strategy to optimize exposure:
- Promote each event multiple times leading up to date (highlighting keynote speakers, networking events such as golf, fun-runs, sponsored receptions, etc.)
- Create a distinct #hashtag for each event to track engagement
- Highlight business partners as a way to deliver value to our vital event sponsors
- Regular posts throughout each event to generate enthusiasm/excitement
- Post pictures after each event thanking everyone for their participation (these posts are always extremely popular and have our highest engagement percentages)
- Board interviews: “Get to know your NC HFMA leadership team”: Our Director of Communications interviewed each NCHFMA board member and created a series of posts where members could get to know their board on a more personal level. This series was so successful that other Chapters asked if they could copy the idea. You can find examples of this series in Attachment 3, “Content Examples”.
- HFMA Certification promotion
- Reposting relevant industry highlights from Becker’s, Modern Healthcare, HFMA national, etc.
- Online Polls
- Networking opportunities
- Volunteer promotion
- New member “Welcome” posts

Please refer to Attachment 3, “Content Examples” for screenshots of NCHFMA posts across LinkedIn, Facebook, and Instagram.

We also realized the benefits of using different platforms for different kinds of content. For example, LinkedIn is geared towards professional development, so these posts are more formal in nature. On the contrary, Instagram is much more informal and allow us to present a more personal side to NCHFMA by posting pictures, memes, etc.

Evaluation and Results:

In order to confirm the overall effectiveness of our social media plan, we measured the increase in followers across all platforms as a tangible means of gaging success:

1. LinkedIn: Starting in 2021, NCHFMA had a total of 420 followers on our LinkedIn page. In one year, we more than doubled followership to 946, and we are already up to 1,154 as of February 2023. That is a two year % increase of 56% and a year-over-year increase of 18% from 2022 to 2023. LinkedIn continues to be our most popular platform, and we anticipate our numbers to grow again in 2023.

2. Facebook: In 2021, NCHFMA had a total of 66 followers on our Facebook page. In one year, we increased followership to 82 and are up to 109 followers as of February 2023 (year-over-year increase of 25% from 2022 to 2023).

3. Instagram: At the end of 2021, NCHFMA had a total of 40 followers on our Instagram page (we started the year with zero). In one year’s time, we increased followership to 68 and are currently up to 98 as of February 2023 (year-over-year



increase of 31% from 2022 to 2023).

Please refer to Attachment 2, “Results and Analytics” for a chart depicting year-over-year increase in followers across all platforms as well as screen shots of the free analytics provided by LinkedIn, Facebook, and Instagram.

Exhibit A depicts a snapshot of the number of daily clicks we received on LinkedIn from February 6 to February 21, 2023.

Exhibit B is from Facebook, and allows us insight in to how many page views we received on a daily basis. In this specific screenshot, we can see that a total of 267 people viewed our Facebook page between the dates of December 24, 2022 and February 22, 2023.

Exhibit C is from Instagram and depicts our most popular posts based on number of accounts reached. This kind of insight allows us to determine what kind of content is most popular so we can determine what to post next. In addition to the above measurable metrics, we also continue to receive positive word-of-mouth feedback on our revamped social media communication strategy from both NCHFMA membership as well as other Chapters. In a recent online poll conducted via LinkedIn and Facebook, 100% of respondents indicated they find NCHFMA's online communication to be beneficial (see Attachment 5, “NCHFMA Online Polling”).

NCHFMA is proud of the strides we have made in our use of social media and aim to continue this positive momentum going forward in 2023.

Chapter Name: Oregon

Submission Type: Chapter

Award Title: President Swap

Submission Summary: The Oregon and West Virginia chapters of HFMA have agreed to a “President Swap” with the aim of sharing best practices, fostering collaboration, and encouraging networking across regions and chapters.

Needs Identification:

HFMA chapters routinely meet with others within their region to exchange ideas and partner on a variety of initiatives. However, chapters rarely have opportunities to go outside of these bounds and learn from those further away from their home state.

The Oregon and West Virginia HFMA chapters were first introduced through networking opportunities at the 2022 Leadership Training Conference (LTC). Over beers and hotdogs at the Arizona Diamondbacks game, leaders began to discuss what each chapter does well and the challenges they face. Many similarities were identified within the chapters, as well as the geographic markets, during the initial discussions but the two teams knew they were only scratching the surface, and both wanted to learn more!

The idea of the President Swap was then born and modeled after the TV show Wife Swap from the early 2000s where two women (the chapter Presidents) swapped households (HFMA chapters) for two weeks (a conference). During the first week, the women had to live by the house rules and could then implement their way of doing things during the second week. While chaos ensued on the tv show, the two families ultimately learned from each other after the experiment was over.



Chapter leaders believed this would be a fun and immersive way to learn from each other while providing a new type of engagement for the chapter members and that is where the journey begins.

Goals and Objectives:

The goal of the President Swap is to share best practices by:

- Finding better ways of doing things: Building a shared knowledge base allows each chapter to gain insights and learnings from what has not worked for the other team. It also results in each chapter recognizing their successes to ensure these are repeated and built upon in the future.
- Building a community and learning culture: A sense of community is built by collaborating and learning from each other. This also reduces or removes any perceived differences between teams caused by geographic distance.
- Creating better member experiences: By learning what has and has not worked for others enables each chapter to bring the very best ideas to their membership.
- Retaining knowledge: The Presidents' terms will soon be ending and it's important to not lose their expertise and experience. By sharing our knowledge, we are contributing to the collective brain so that others can continue and build upon our work.
- Upping the fun factor: Learning should be fun! The format is creating a shared experience for participants and will result in long-term recall of learnings.

This will be accomplished by:

- Each President attending one (1) conference at the partner chapter.
- When attending, the President will participate in one (1) Board meeting and speak to the general audience on the topics of engagement and best practices.
- The President will report back to their home chapter with lessons learned.
- Chapter leaders will participate in podcasts to share more about their experience during the President Swap
- Each chapter will complete a write-up of feedback and lessons learned to share and memorialize the event.

Methodology:

Once the Oregon and West Virginia chapters agreed to pursue the President Swap, each chapter identified the conference where this would take place.

- West Virginia's Winter Conference: January 2023
- Oregon's Spring Conference: May 2023

Both chapters selected their largest conferences so that the visiting President and the most chapter members were able to get the most value from their experience.

The West Virginia Winter Conference included the following:

- Board Meeting
- Mini LTC
- 1 ½ Days of Education
- Vendor Fair
- 2 Networking Events, Including a Themed Dinner, Dance and Award Presentation

The Oregon Spring Conference is the chapter's annual event and will include the following:

- Board Meeting
- Mini LTC
- Golf Tournament



- 1 ½ Days of Education
- Awards Presentation
- Themed Dinner, Dance, and Installation Ceremony

Prior to the Oregon HFMA President visiting the West Virginia chapter, the two Presidents met to discuss logistics, as well as each other's expectations. The chapters agreed to the following:

- Cost Sharing: The home chapter would be responsible for the cost of hotel and conference registration. The visiting President's chapter would be responsible for airfare and transportation, as well as meals while traveling.
- President Participation: The visiting President would speak at the mini LTC, be an active participant at the Board meeting and kick off Day 1 of the conference.

To market the President Swap, Oregon HFMA invited the West Virginia President to be a guest on their podcast Imagine Amazing. The Presidents were interviewed by the hosts of the podcast and were asked what chapter members and conference participants could expect. This was then shared to each chapter's social media sites (attached).

Additionally, the Oregon HFMA President documented their journey to West Virginia starting at the Portland International Airport through photos and video with the end goal of sharing the experience via social media (attached). And a summary of learnings and observations was prepared and shared at Oregon's Winter Board Meeting (attached).

This work is still in process and next steps include:

- Inviting the West Virginia President and 1 – 2 Board Members to participate in an upcoming episode of Imagine Amazing to share their learnings.
- The West Virginia President attending Oregon's Annual Conference in May
- Documenting the experience via social media through pictures and video
- Recording a final podcast to conclude and share the experience and learning with both chapter's members.

Evaluation and Results:

As Oregon HFMA's president, I have the opportunity to network with other chapter presidents within my region on a regular basis. However, I have never had the opportunity to attend another chapter's conference prior to the President Swap and would enthusiastically encourage future presidents to do this – immersive learning at its finest!

Key observations shared with the Oregon HFMA Board include:

- Both West Virginia and Oregon HFMA have engaged leadership teams that are committed to bringing value to their members.
- Members of both chapters value the connections and friendships made with other HFMA members.
- Business partners of both chapters are highly engaged and supportive of the chapters.
- Networking events are both highly anticipated and highly attended in both Oregon and West Virginia. The fun factor is high!

Key learnings that Oregon HFMA took from the President Swap and are in the process of implementing include the following:

- West Virginia had multiple sponsorship opportunities for less than \$500 to support their themed dinner, dance and award ceremony. As food and beverage costs have increased and provider budgets have decreased, it is important to find alternative funding sources. Keeping sponsorship opportunities at less than \$500 increases a business partner's ability to contribute without additional organizational approvals. The Oregon chapter will immediately be implementing



this in preparation for its annual conference in May.

- While each Oregon HFMA President acknowledges a chapter member for their outstanding service throughout the year, it is simply titled the “President’s Award.” West Virginia has multiple chapter awards that are named in honor of past chapter members. This made the award ceremony feel very special as new award recipients were now forever tied to the chapter’s founders. Oregon HFMA will now consider renaming their award to honor of our founding members as well.
- Both chapters are continuously evaluating how members want to receive education. This includes a mix of both in-person conferences and live-streaming events, lunch and learns, analyzing case studies as a team and developing mentor / mentee relationships. An idea that developed through a brainstorming session with both chapters was sharing more about what is included in our HFMA membership at a conference. Oregon HFMA ran with this idea and our Regional Executive and Regional Executive 3 are speaking at our upcoming conference on this topic.

Feedback received from the West Virginia chapter included:

“This experience was not only a way to ‘see if the grass is greener’ but it also allowed me to realize chapters are not that different and chapter size doesn’t make things any easier. I learned that the only limitation is what you set.

Meredith and the Oregon Chapter brought a different level to our winter chapter and having another President with you gives you another level to your game. This experience was not only fun but it will rank in my top HFMA moments thus far. I loved sharing West Virginia HFMA with Meredith and having her experience a fun-loving chapter. She fit right into our group, and I know she took some great ideas back with her. I can’t wait to experience all the fun and learning Oregon has to offer!” – Marcia Leighton, West Virginia HFMA President

“It’s exciting to meet new people and learn new things. Sometimes its hard to learn from a distance over Zoom so I think it’s FANTASTIC that we’ve taken the opportunity to have you come here so we can learn from you in our own space.” – Autumn Heaster, West Virginia Board Member

West Virginia was an amazing host to Oregon this past January! It was so much fun to celebrate their Homecoming party with a message from some friends (video attached) and realize Oregon already shared a connect with the state as our chapter parodied Take Me Home, Country Roads while marketing HFMA’s Western Region Symposium in 2020.

Oregon is looking forward to our turn to host West Virginia in May as we continue our friendship and learnings!

Region Name: Region 6

Submission Type: Region

Award Title: Boldly Increasing Engagement – Region 6 Conference

Submission Summary: First ever Region 6 event! The challenge: re-engaging members for the first time post-COVID. Results: a three-day conference that had the largest percentage of provider participation compared to three other long-standing regional events, located in high-profile destination cities.

Needs Identification:



Region 6 recognized that we needed to bring all the Chapters together to meet multiple needs:

- The Chapters needed to get back to offering in-person events in the Post COVID environment.
- We wanted to reduce duplication of conferences, thus reducing the cost and volunteer efforts necessary to plan multiple conferences.
- We needed to get members reengaged with in-person events after COVID; but most providers were not reimbursing travel/conference expense.
- Providers needed to be reminded of the value of HFMA and to encourage employee involvement.
- Sponsorship needed to get back in front of the providers to promote their businesses and to share their expertise.
- Chapter sponsorship revenues had declined during COVID and the Chapters needed the financial support from the business partners in order to continue to provide the excellent programming that members were used to and expected.

Goals and Objectives:

- The primary goal was to re-engage people, providers, and business partners, and provide excellent education and much needed networking time.
- The objective of the Region was to bring the five Chapters together to work towards a unified goal, which was the first in-person collaborative event.
- Based on information provided, other regional conferences struggled with provider engagement. We wanted to get 50% providers to attend this event.
- Executive outreach was important because if they see the value, they will send staff to future local Chapter events...this event would help trigger increased local participation going forward.
- Business Partner Engagement was identified as key to the success of the event and the on-going support of the chapters. They needed to be able to talk to the providers, especially the executives that we hoped the conference would draw.

Methodology:

- Organized a unique CFO Roundtable with Joe Fiffer as moderator. We started with direct outreach to CFOs before planning the event-to gauge their interest. It was an invitation only event with a separate Cvent registration. The roundtable was held in a different wing of the conference center and a private lunch was served. Business partners were not given access to the attendees, however CFOs who attended the round table were given free access to the rest of the conference and encouraged to meet with business partners during other times.
- To achieve a more balanced business partner/provider attendance, we limited business partner registrations to 50%. The only business partners allowed to register once the quota was reached were the sponsors who had committed resources but had not yet registered their attendees.
- To boost the provider attendance, registration cost for providers was reduced to \$200, while business partner registration was \$500.



- Since many providers were not willing to pay for travel, the committee offered provider scholarships that were distributed evenly to each Chapter. The presidents and presidents-elect personally contacted providers to invite them to use the scholarships.
- Social media, such as Facebook and Twitter were used for advertising the conference, as well as the HFMA Community.
- Worked to increase value to sponsors:
 - Offered sponsors the opportunity to hold table discussions on topics of their choice at lunch on Thursday. Table signs were posted so people could sit in on discussions of interest. Some tables set up for open seating, so people did not have to participate.
 - Named the conference rooms after the sponsors.
 - Allowed sponsor to name the internet login.
 - Sponsors introduced speakers in the general sessions and breakouts.
 - Allowed sponsor advertising on hotel keycards.
 - Set up sponsor booths in the dining/entertainment ballroom.

Evaluation and Results:

- Attendee Ratio was 34.32% provider compared to 65.68% business partner. This was much more balanced compared to other recent regional events (See attachment). In fact, our conference had the highest percentage of provider attendees than three other long-standing regional events, located in high-profile destination cities.
- The CFO Roundtable event allowed CFOs to have private, open dialogue amongst peers. Also, because we provided free access to the main conference, many stayed for general sessions and networking. They all gave very positive feedback and asked that we continue this type of event in the future.
- Attendance was budgeted for 225 registrations. Actual registrations totaled 271 or 120% of goal.
- Sponsorship revenue was budgeted at \$113,000. Actual totaled over \$150,000, which was 133% of goal.
- Redundant Conferences: MI eliminated the annual Spring Conference, and Northeast Ohio eliminated their May event to do Region 6. The other three Chapters did not have routine conferences in that period.
- Feedback surveys were very favorable, 4.68 overall and 4.81 for educational content with 97% and 99% above average ratings, respectively (see attachment).
- In verbal conversations with business partners, they expressed this was the most valuable conference they attended post COVID.
- The region decided to continue this joint conference bi-annually in September.
- The main opportunity that came to light from the conference feedback surveys was the location. To address this concern, an HFMA member survey was developed to find out location preferences for future conferences, such as rotating between the Chapter areas or a central location.
- Participants were excited about the keynote speaker and the hopes of winning a signed football. One executive, who spoke on Thursday, flew back on Friday to meet the football star.



- Feedback was received about the lack of time to enjoy the amenities of the hotel. In the future, we will set up the hotel discount to include extra days before or after the conference if people choose to stay.

- Each Chapter made a profit from the conference to go towards local programming and operational costs. Net Profit was budgeted at \$14,125, actual was \$36,380, which was 258% of goal. Half of the profit was split evenly amongst the Chapters and the other half was allocated according to the attendance breakdown of Chapter members. We developed this methodology to reward Chapters for their participation in planning the event as well as encouraging their membership to attend.

INNOVATION CATEGORY

Chapter Name: Mississippi

Submission Type: Chapter

Award Title: Improve Provider Member Access to MS HFMA Meetings

Submission Summary: Due to the rural landscape in MS, there are only so many places meetings can be held. Our meetings are generally held in Biloxi or Jackson (post-COVID) which require a large number of members and non-members to travel to attend the meetings. Our goal is to bring the meetings to them.

Needs Identification:

Our MS chapter is aware of our limitations when it comes to on-site meetings. Most members that travel to out of town meetings would prefer to attend conferences in towns where "there is something to do." This is particularly true when their employers, in particular provider employed members, are allowed to attend. The current economic situation in our hospitals has made it very difficult for members to seek education that is held out of town. However, in order to entice members to travel out of town, especially after COVID, we hold our meetings in Biloxi and Jackson. Pre-COVID, we would also hold a meeting in Philadelphia, MS; however, this wasn't very well attended due to the venue.

Biloxi, where we hold our annual meeting, is well attended. Biloxi is on the MS Gulf-Coast, so it has many different activities members can enjoy. However, this causes our Northern county members to travel more than 5 hours, so they often do not come to this meeting.

Jackson is the state capitol. We generally have a one-day event in order to entice the Providers in the Jackson-Metro area to attend. This meeting is well attended, but again results in the coastal and northern regions not being able to attend due to the travel required for a one-day event. We changed it to a two-day event for August 2022 which resulted in more attendance, especially from providers. But it was attended primarily by providers from the Metro area and not necessarily out of town members.

For this reason, our board decided that it was time to find new avenues to allow all of our members to enjoy the benefits of HFMA. At our August 2022 board meeting, we decided that if members were not able to travel to our usual destinations, then it was time for us to bring the meetings to them. For that reason, we came up with "MS Road Shows". While our application is geared towards innovation, we feel the "MS Road Shows" would also fit the engagement and value category.

Goals and Objectives:

Our goal was simple: get more members to attend our meetings, in particular provider members. The solution: bring the meeting to our members so they don't have to travel. At our August 2022 board meeting, we came up with the idea of "MS Road Show". This tag line meant two things:



1. We wanted to find areas of our state where our members have not been able to enjoy the benefits of HFMA
2. We wanted to bring the meetings to these areas and show our members that we care about them

Methodology:

Once we had this goal in mind, our next move was deciding where we should take our “Road Show” first. We decided that the northern area of our state was a prime location. We have heard from our members in these areas that they are not able to attend our events due to them being so far away from home/work.

After our board meeting, our program committee met and got started on planning. The committee decided that the first “Road Show” would be in January 2023. With a date and expectations set, we created a template agenda and got started with the process of reaching out to speakers. Our team delegated duties regarding reaching out to speakers and a deadline for speaker forms to be returned. Our next step was selecting a venue and nailing down dates.

Our goal for the venue was to have it somewhere that would be provider friendly. What better place to do this than at a provider site? Luckily, one of our members is employed by North MS Health Services. They reached out about the possibility of having the event at their hospital. North MS was not only willing but went above and beyond to help us have this meeting on their campus. Once the venue was set and we knew their availability, we scheduled our conference for January 18-20, 2023.

We not only wanted to bring the education to our members, but we also knew that we were competing with virtual events that tend to be cheaper than on-site events. In order to be successful, we knew we needed to have not only great education but also a great price. Because the venue was being so generously donated by North MS, it allowed us to set the price at \$25 for a provider member and \$50 for a non-provider member. We expected only a few non-members to attend, so we set the price slightly higher at \$150. We also set up room block with a hotel nearby and had a great social at a restaurant close to the hotel/venue.

This was just the beginning of our plan. Once all this was set, we began planning our next “Road Show.” We are taking it to another area where we have members that have not been able to attend our events. Hattiesburg area, get ready!!

Evaluation and Results:

Like anything done for the first time, there were a few hiccups our team encountered along the way, but nothing that set us back from our first Road Show. North MS and Tupelo, MS were a great venue for our first event and one that really got us excited for future Road Shows. Our results can be summarized as follows:

1. While we had 62 attendees registered (this is a high number for our chapter) this doesn’t tell the whole story as we allowed North MS employees to come and check out the event. Our hope is that by then seeing what we are about, they will be want to become members down the road.
2. Out of the 62 registered members, 30 were provider members. This 48% member attendance is something unlike we have ever experienced in our chapter. However, it would be worthwhile to point out that if we count those North MS employees that “checked-out” the event, our provider percentage would be even higher.
3. In addition, our first Road Show netted \$2,450. This number might not sound very high for other chapters, but for a small chapter like MS this is huge!
4. Finally, our event received a 4.81% out of 5 when attendees were asked to rate their experience attending the conference.

This is a great beginning to what we expect to be more successful Road Shows. No area of our state will be able to say again that the events are too far for them!



Chapter Name: Oklahoma

Submission Type: Chapter

Award Title: Oklahoma HFMA'S FIRST-EVER Women in Healthcare Conference

Submission Summary: “Birds fly over the rainbow, why then oh why can’t I?” There’s no better quote or imagery to describe the sentiment that most everyone felt after the Oklahoma chapter’s first Women in Healthcare Conference!

Needs Identification:

Our chapter leadership regularly checks the pulse of our membership in an attempt to provide the best education, career development and networking experience. Chapter members voiced concerns about the lack of women specific topics and diverse speakers that could weigh in on the present-day challenges affecting women in healthcare. This especially held true after the recent changes to how we work, where we work and, more specifically, how the post-COVID environments affect our mental health, particularly for female employees. Oklahoma chapter members showed excitement when presented with the idea of having a women’s themed conference.

The chapter’s current President, Louise Kiper was passionate about holding the Oklahoma chapter’s first-ever Women’s Healthcare Conference. Research found that recent studies showed networking, professional and association groups focusing on women have become ubiquitous. However, the opposite was found to be true in the healthcare association arena, as women in healthcare have felt a need for a different kind of space for some time.

There are numerous surveys and studies that show the value of a diverse workforce and leadership team, but barriers continue to persist in the job market. Women represent over 58% of the US workforce; but, as of 2020, only held 35% of senior leadership positions. Healthcare is one of the industries with highest percentage of women in leadership positions, accounting for approximately 40% of roles. However, this percentage still falls below where it should be. Studies also show that having a diverse leadership team, which includes women, ensures that a variety of perspectives are considered and results in greater financial and non-financial outcomes.

The Oklahoma chapter of HFMA works to ensure a balanced leadership approach. Three of its six executive leadership roles are currently filled by women, and three of its six board members are women. The same balance is held in committee chair positions. This balance isn’t always present in the healthcare arena, allowing the chapter to be in a position to “lead the charge” towards a more equitable and diverse workforce.

Chapter leadership felt that more should be done to actively encourage women to become members and leaders, and that by holding an event specific to the needs of women in healthcare, it could set the stage for continued growth and engagement. In addition, the increase in virtual options available for education and peer networking caused those who are introverts to feel isolated. We believed this event would be a welcoming place for individuals, including those working from home, to get out of that comfort zone and engage with fellow members.

To signify the importance of this initiative, chapter leadership and board members included this as one of the chapter’s primary goals on the 2022-23 Chapter Success Plan.

Goals and Objectives:

The overall goal was to create an event that was led by strong women, encouraged active involvement, and provided relevant industry education to participants. The conference should be energetic, fun, and valuable to those taking time to attend and held in a location that was accessible and affordable, reducing as many barriers to attendance as possible. A hybrid session for individuals not able to attend in person was also a necessity.

While the conference was meant to specifically target women, the chapter wanted to ensure it was also inviting to men. The ability to promote a more inclusive and diverse workforce and leadership group requires men to understand the value of these changes, as well as the differences between gender, personality types, etc.

A conference’s most important components are the speakers and content. We wanted approximately half of the sessions



to cover women in leadership topics and the other half to cover industry content, but be led by female leaders. We wanted to ensure adequate time allocated to networking opportunities to share reactions and ideas, as well as grow professional networks.

In order to stand out from other conferences and not simply be a women's conference in name only, the group wanted an all-encompassing theme that could be carried throughout the event. There should also be a social event that carries the theme and encourages participation, challenges attendees, and fosters connections.

Methodology:

We started by establishing the conference theme as the Wizard of Oz, specifically the quote by Glinda the Good Witch, "You've always had the power my dear, you just had to learn it for yourself!" This quote has been a favorite of Ms. Kiper as she progressed in her career. We then engaged an advertising firm to create the graphics that would guide the conference. (Please see attachment 1 for graphics.)

Next, out of a variety of location options, we selected the Student Union & Conference Center Ballroom at Oklahoma State University (OSU) in Stillwater, Oklahoma. Most Oklahoma HFMA conferences are held in either Oklahoma City or Tulsa. Stillwater is approximately 1 hour from each major metro area, so could garner attendance from all areas of Oklahoma, including both metro cities. The OSU campus also includes The Atherton Hotel. Listed as one of the Historic Hotels of America, this boutique hotel is directly connected to the student union. By moving away from a traditional conference center and hotel, we were able to save a lot of overhead on meeting space, parking and catering which enabled us to spend more on the experience and quality speakers.

With the theme and location firmly in place, the programming committee searched for speakers and topics to meet our goals. To highlight the conference, the first female President and CEO of Oklahoma State University (OSU), Kayse Shrum agreed to discuss her career path and leadership insights. Before being named president, Ms. Shrum practiced pediatric medicine and was named President and Dean of OSU College of Osteopathic Medicine, so she also clearly understands the healthcare industry. In addition, the Vice-Mayor of Stillwater, Alane Zannotti agreed to kick off the conference with an inspirational opener.

The committee continued to identify topics and speakers that fit the objectives laid out for the conference. By securing all speakers in a timely fashion, it enabled those speakers to cater their presentations to the Wizard of Oz theme. Examples included the following sessions: "Finding Your Yellow Brick Road to Success;" "Creating a Sustainable and Optimized Workforce: We're Not in Kansas Anymore;" and "Managed Medicaid: A Look Behind the Curtain." (Please see attachments 2, 3 and 4 for agenda and speakers.)

To ensure we had one session delivered in a hybrid method, the session titled "Managing Remote Employees" was selected given the subject matter. Not only was the session offered online via Zoom, but the speakers were also onsite and we live-streamed the session to individuals onsite.

To drive home the fun and energetic components, Wizard of Oz themed decor, including cardboard cutouts, a rainbow of balloons, and a photo op location were purchased and/or created. (Please see attachment 5 for decor pizzazz.) In addition, Wizard of Oz trivia was created with prizes for participants that fit the women in leadership motif. Each table was also decorated with similar trinkets.

For the social event, we secured the "Topsy Artist" to hold a painting course after some heavy appetizers. Not only did Tiffany the Topsy Artist cater the event to the theme by creating personalized marketing materials, but she also provided a painting option that was Dorothy's famous ruby slipper with the conference slogan. Participants also had the choice of painting "Poppy" flowers or a summer themed Volkswagen Bug (geared toward men attendees.) Finally, a personalized cocktail was created just for this social event.

With all items in place, members were provided with various forms of communications to market the conference. Registration emails were sent out from Cvent and directly from the communications chair and president. The communications were on message with the Wizard of Oz theme, purpose of the conference, and stressing the



inclusiveness of the event.

Everything was set... it was time to just have fun!

Evaluation and Results:

We not only managed to pull off our first women in healthcare conference but it exceeded our expectations. Based on the survey results from 18 attendees (36% response rate), the average conference rating was 4.833 out of 5 with 100% responding that they would recommend the event to others. In addition to the quantifiable survey results, the following comments summed up the conference better than any explanation:

- “I was rejuvenated and motivated!”
- “Great conference-better than expected! Very informative and motivational! Lots of introspection.”
- “Awesome event thanks to everyone who worked so hard planning and holding this event.”
- “Great location & facilities! Painting was fun!”
- “Keep this in Stillwater, OK and an annual women’s event.”

Part of what made the conference such a success to the participants was the presentations. As Dwight D. Eisenhower noted, “Plans are worthless but planning is everything.” The speakers not only renamed their sessions to fit the Wizard of Oz theme, but also incorporated these ideas throughout their sessions. For example, the “Finding Your Yellow Brick Road to Success” presentation had unconscious bias represented by the Wicked Witch, investing in yourself represented by the Scarecrow, developing courage of course being the Cowardly Lion, and Dorothy representing self-promotion. The speakers/topics were not only very informative but were also fun and a big hit! There were even small group breakouts to discuss what was learned and what could be implemented when returning to the office.

The social event capped off the inaugural event. The majority of the participants stayed onsite to enjoy in the event, making it one of the most attended social events the chapter has had as part of a conference. The event proved to be a perfect cap to the leadership lessons discussed earlier in the day. The amateur artists were charged with one of the most fearful challenges – create a painting. “There is no living thing that is not afraid when it faces danger. The true courage is in facing danger when you are afraid, and that kind of courage you have in plenty.” The encouragement and reassurance pushed everyone through to create their own masterpieces and tangible memories. (Please again see attachment 5 for painting examples!)

At the conclusion of the event, many of the programming group stayed for a lunch at the famous Mexican Joes to decompress. There was overwhelming sentiment that this was an iconic event that met and exceeded all goals and objectives established. All of our “Dorothy’s” found the power they’ve always had.

Chapter Name: Puerto Rico

Submission Type: Chapter

Award Title: MAP Keys Top Performers Academy

Submission Summary: Academy for CEOs, CFO & C-Suite Executives where we presented the MAP Initiative to encourage the use of the keys and app for the first time in Puerto Rico. We wish to help Institutions implement strategies to measure their performance and improve their results so they can become a Top Performer.

Needs Identification:

- Unawareness of the existence of the MAP Initiative in general
- Lack of Data- Not measuring the right Data
- Resistance to comparing with others



One of the goals we had this year, was to highlight all the benefits and tools that come attached to an HFMA Membership and how we differentiate from other organizations that compete for the same kind of professional member. One of the areas where we saw a lot of potential was the MAP Initiative because of all the components it has and it is very different from what others offer.

We noticed that the MAP Initiative is a very powerful tool that could be used to help our members succeed in their roles by measuring their performance. We did a survey that demonstrated that less than 10% of our membership had heard of the MAP Initiative, Keys, or awards.

We saw an opportunity to educate our members while also adding value to the membership by providing them with tools that they are not currently using and that are available to them.

In another survey, we identified that there are numerous KPIs from the keys that none of the participants measure currently in their Institutions. Some of them are not being measured because of data availability and others because our payment system is different from that in the States in many ways. We saw an opportunity to start motivating our members to participate in this Initiative that could bring more visibility to the differences we face.

We invited members that had the decision-making power in their institutions to move this forward and nonmembers that we could present this initiative to so they can see the benefits of becoming a member.

Our vision was simple: Present the initiative, motivate the participants to start using the keys and the app during the next year and with our help establish best practices that could improve their KPI's.

Since historically there is a big resistance to publish data and to compare to other Institutions, we had to identify key members in the industry that have the vision to pioneer this project in Puerto Rico and help us highlight the benefits of measuring oneself in order to identify areas of opportunity. We thought that maybe we could get two (2) institutions to pledge participation in the next 2 years but after the educational event we got nine (9).

We agreed that we would do an initial meeting to establish which Keys they could start measuring right away depending on their systems, and establish processes to gather the missing data.

We would do a second meeting to see the results of the keys for the first time and later in the year a third meeting to see the results after improving different processes needed based on the results of the KPI's.

Another way we wanted to highlight HFMA is by coordinating a demo of the MAP app so they can see the functionality and start using the tool. We believe that as soon as they start using it, that will encourage others to do so too.

One of the messages we shared is that you can't improve what you don't measure and the Map Initiative will help them do just that.

After we gather enough information, we wish to help our Pledged institutions to submit the information to be considered for a Map Award for the first time in Puerto Rico. We wish to help our members improve their results and be recognized by it as a revenue cycle high performer.

That motivated the name of our Academy "HFMA MAP Keys Top Performer Academy".



Goals and Objectives:

- Bring awareness to the Puerto Rico Health Industry about the MAP Initiative, its Benefits, and its uses.
- Motivate at least 2 institutions to pledge to participate in the MAP Initiative during the next 2 years and pledge more institutions based on the experience of the first pledged class.
- Measure the progress with 3 meetings during the year.
- Share best practices with them so they can implement strategies in their work.
- Maximize utilization of the MAP APP by Requesting a demo for the pledged Institutions.
- Enter the data in the app and compare results consistently.
- Identify areas of opportunity and improve them with best practices.
- Document changes.
- The final goal is to improve the numbers of our pledged institutions so we can apply for a MAP award for the first time in Puerto Rico and hopefully win an award.

Methodology:

- Surveys were created to grasp the level of knowledge our members had about the MAP Initiative.
- A combination of people was chosen between Members (to engage them) and non-members (to attract them).
- We chose executives from all the groups represented in the initiative from all over the island: Hospitals, Critical Access Hospitals, hospital Systems, Integrated Delivery Systems & Physician Practices.
- An invitation was sent to an educational event (Invitation & PowerPoint attached).
During the event, we presented the initiative:
 - Map Keys
 - Map Apps
 - Revenue Cycle Conference
 - Map Awards.
- We discussed the Map Keys and helped the identify the best ways to gather the information depending on their different accounting systems and EHR.
- We then talked about how they could use the data in the MAP APP to compare to other similar institutions and start measuring the improvements they made after establishing the first results of the keys. We presented a video provided by HFMA so they can get a better idea of how it works.
- After the keys and the app were discussed, we talked about the Revenue Cycle conference to promote it motivate more participation from our Chapter in the upcoming years.



- We finalized talking about the MAP Awards where they could be recognized as a top performer in Revenue Cycle Standards.

Evaluation and Results:

- 100% of the invited executives attended the event.

- The goal was to convince 2 different Institutions to agree to participate in this initiative to measure, improve and apply for an award in the upcoming years.

- We were able to achieve 9 pledges from different groups! Compromises/pledges are attached.

- The evaluations are attached. The event, the educational quality and the event in general was rated as excellent. The attendees indicated that they pledge participation since they didn't know this was available and were excited to get to know more about the tools.

- Our attendees shared best practices and indicated that they felt in safe and professional space to discuss internal processes.

We are very happy with the results because we believe that as members, we should be the first line in promoting all of what HFMA has to offer. We exceeded our expectations of who might be interested and got a lot of positive feedback about the tools. We genuinely believe that this differentiates our Association from others to add value to the membership.

We are very proud of the event and of what we think this initiative can accomplish for our members in the future.

VALUE CATEGORY

Chapter Name: Iowa

Submission Type: Chapter

Award Title: Revamping the Payer Panel Event

Submission Summary: The Iowa Chapter suspended its bi-annual Payer Panels due to the Covid-19 and attempted to re-introduce the event virtually in fall 2020. We tried to offer 6.5 hours, but there were long down times during the event and attendance was the lowest since we started. We needed a different approach.

Needs Identification:

Since 2011, Iowa Chapters of HFMA and AAHAM have sponsored Fall/Spring Payer Panels in Des Moines. The event was positive collaboration between HFMA, AAHAM, and other major Iowa payers, providing revenue cycle professionals and opportunity to discuss questions and receive policy, education, and other updates. The live format allowed for Q & A sessions and enabled individual follow-up discussions with payer representatives. An in-person meeting was scheduled for March 2020 and was cancelled due to the Covid-19 pandemic. As the fall meeting approached, restrictions regarding the pandemic were in place, and a decision was made to trial a virtual only payer panel event. Although the payers did prepare content and presentations, each payer's content fell short of the time allotted, and providers asked very few



questions in the virtual format, leaving large gaps in the agenda. Attendance was the lowest since we started (Exhibit #1). Feedback from Crystal Estabrook, organizer of the event was as follows; “As we were still in the height of the pandemic and typical host location Unity Point was not allowing outside conferences/large group meetings to be held at the facility, Iowa HFMA leaders decided to hold the previous bi-annual payer panel virtually. Although participants appreciated the opportunity to convene remotely, there were several individuals that provided feedback post the panel as to areas of opportunity. Main areas of feedback included preparation of the speakers, length of the presentations provided by the speakers, and lack of audience participation. Many of the payer presentations ended earlier than their scheduled time allotments, leaving the participants signing off and potentially not rejoining (or questioning when to rejoin). The quality of the presentations fell short due to both the amount of content provided as well as the lack of interaction by participants.” Lessons learned: from the event were;

- 1) Set expectations with payers prior to the event, or work with payers to determine appropriate presentation time allotted. Time provided can vary based on current issues/topics applicable to each payer. Once a timeframe is established, organizers should review content/presentations with the payers to ensure presentation (and Q&A session) will meet these expectations.
- 2) Organizers/moderators request questions from attendees pre-event.
- 3) Organizers/moderators send list of questions to payers to ensure payers are prepared to respond/answer accordingly.
- 4) Organizers/moderators run through the list of questions during the event, but also have additional questions prepared if none/limited amount of questions are submitted prior to the event.
- 5) Moderator encourages audience participation throughout the event.
- 6) Communicate schedule during the event and stick to the schedule, even if a presentation ends early.

Since the pandemic was ongoing, and the virtual event had poor attendance and was not successful, Iowa HFMA made a conscience decision to discontinue the payer panels and focus on quarterly HFMA meetings during the Covid-19 pandemic. To continue to offer high quality education for revenue cycle leaders, the Iowa Chapter needed to continue the payer panel in a new format.

Goals and Objectives:

The HFMA payer panel committee decided to try a revised, new payer panel format virtually. The main reason to host a virtual versus in person event were cost of an in-person event, cost of provider’s travel and recognizing provider travel restrictions. A 2022 Iowa Member survey noted that Iowa members preferred Revenue Cycle topics held on Thursdays during the middle of the month (Exhibit #2).

Key Goals for the event were:

- Increase attendance.
- Manage event cost.
- Improve attendee satisfaction (as measured via attendee surveys).
- Provide a high-quality education at a low cost for the providers.

Methodology:

In response to dwindling content with the payer panels, Iowa Chapter leaders recognized that the payer panels needed to be re-vamped. A new format was needed to appeal to members to increase attendance and maintain high satisfaction with the event. The committee took the information from the survey and the lessons learned from the last virtual event and designed an agenda that would hopefully eliminate the issues experienced with the last event (Exhibit #3). Emails were sent out to members to solicit questions for the payers (Exhibit #4).

Evaluation and Results:

On February 23rd, the Iowa Chapter hosted its first “revised” payer panel since fall 2020. Emails were sent out for the registration in advance. The event was priced at \$50. Attendance was 73, up 43% from the most recent virtual event



(when we had 51 attendees). Since we had budgeted for 61, we met our goal, and the event was our highest attended payer panel since spring 2018, (pre-Covid-19). The feedback survey had a 37% return rate and demonstrated that we had met our goals Results of the survey were;

Overall, how would you rate this event?7-Average, 15-Good, 5- Excellent

Overall,how were the topics;7-Neutral, 14-Satisfied, 6-very Satisfied

Was the time allocated appropriate?7-Neutral, 13-Satisfied, 7-Very Satisfied

Would you recommend this event to a colleague? 26-yes, 1-no

We had a result of 75% rating of “good” or “excellent” on the overall rating of the event and a 96% rating on the recommend this event to a colleague (Exhibit #5). HFMA leadership’s goal was 70% on overall rating.

Cost of the event was minimal and less than\$100, netting the chapter a profit of over \$3,500, which accomplished our goal to manage costs. .

Overall all feedback from attendees, including a testimonial from a revenue cycle leader, demonstrated to our team a successful event that met intended goals (Exhibit #6).

Chapter Leadership was very pleased with the event and considered it successful! We are going to use this feedback to plan future virtual events and build upon the success that we accomplished by pre-planning and structuring programming with this new format.

Region Name: Region 3

Submission Type: Region

Award Title: Playing To Our Strengths, Promoting Value Through Unique Educational Sessions Across the Region

Submission Summary: As an element of our monthly calls it became apparent that certain Chapters had traditionally included unique educational sessions that fell somewhat outside the norm. It was decided that in situations where these events were virtual to promote them across the Region to the benefit of all members.

Needs Identification:

A routine agenda item on monthly calls of the Region 3 Leadership is a review of progress with Chapter Success Plans as well as upcoming educational and networking events. It became apparent that Chapters had unique educational offerings that they had traditionally presented and that there was an opportunity, for those events that would be virtual, to promote these unique events to all members of Region 3. These sessions could be the standard hour-long webinar, or a more involved presentation lasting several hours and including multiple presenters. It was decided by the Region 3 Leadership that providing access to these unique offerings would enhance the value of membership consistent with the goals of One HFMA.

Goals and Objectives:

The primary goal of this initiative was to enhance membership value through the presentation of a wide variety of topics of interest to Healthcare staff, regardless of their current position or function. The first of these educational webinars that was promoted to all Region 3 members focused on the annual Charge Master Update, which addressed the upcoming changes to CPT-4 and HCPCS codes effective January 1, 2023. The NJ Chapter had traditionally presented this as an in-person event in December, subsequent to the Annual AMA Meeting where the new codes are introduced. The second event was the Metropolitan Philadelphia Chapter’s Professional Development Seminar, which contained information to members at all stages of their professional career. The third event was Central Pennsylvania’s 340B Strategies for Success, of particular interest to 340B providers or those considering participation in the program. The fourth event is the Advanced Cost Report Preparation Course, hosted by the NJ Chapter, which is geared to individuals



with a strong background in cost report preparation. Each of these courses were promoted across the Region through emails and social media postings that originated from the hosting Chapter.

Methodology:

Virtual education sessions became the norm during the pandemic and remain an important vehicle for providing education content to our members. As the Chapters in Region 3 planned their events for the current year it was important to identify which would be held in-person and which virtually. Each Chapter used their own decision-making process, but all recognized that for the foreseeable future the education calendar would contain both in-person and virtual offerings.

On the monthly Region 3 calls the group identified those educational events that were in the planning stages that might be of interest to all members in that they were focused on unique topics not routinely presented by the individual Chapters. The four virtual sessions described in the Goals and Objective section of the submission met the criteria. By simply requesting that the presenting Chapter's webinar invitation be sent to all Region 3 members we were able to promote the events to all of Region 3. The Chapter hosting the webinar was also encouraged to promote the event on social media in order to reach the widest possible audience. Registration reports were extracted from Cvent that included the registrants' home Chapter. A fair number of registrants left the Chapter field blank, which upon review were typically non-members. There were also registrants who were HFMA members but from Chapters outside Region 3, which shows the value of social media promotion.

Evaluation and Results:

The results of the registration for the events confirmed the original premise that there was demand from members across the Region and beyond for these unique educational sessions. There were 135 registrants for the Charge Master Update (Exhibit A), hosted by the NJ Chapter on December 13, 2022. This included 78 members from the NJ Chapter, 43 members from the other Chapters in Region 3, 8 HFMA members from outside the Region and 6 non-members. Approximately 58% of the registrants were from the NJ Chapter, with the remaining registrants from other HFMA Chapters or non-members.

Metropolitan Philadelphia HFMA's Professional Development Seminar, hosted on January 19, 2023 had 180 registrants (Exhibit B). This included 73 members from the Metropolitan Philadelphia Chapter, 67 from the other Region 3 Chapters, 5 HFMA members from outside the Region and 35 non-members. Approximately 41% of the registrants were from the Metropolitan Philadelphia Chapter, with the remaining registrants from other HFMA Chapters or non-members.

The 340B Strategies for Success webinar hosted by the Central Pennsylvania Chapter on February 16, 2023 had 175 registrants (Exhibit C). Of this number 73 were from the Central Pennsylvania Chapter, 93 from the other Region 3 Chapters, 8 HFMA members from outside the Region and 1 non-member. Approximately 42% of the registrants were from the Central Pennsylvania Chapter, with the remaining registrants from other HFMA Chapters or non-members.

The Advanced Cost Report Preparation Course, hosted on February 28, 2023 had 150 registrants (Exhibit D). This includes 56 members from the NJ Chapter, 64 from the other Region 3 Chapters, 11 HFMA members from outside the Region and 19 non-members. Approximately 41% of the registrants were from the NJ Chapter, with the remaining registrants from other HFMA Chapters or non-members.

In discussing the ongoing success of this initiative on the most recent Region 3 Leadership call it was decided to continue to promote these types of unique educational sessions to all members of the Region, both through email invitations and social media postings. Of interest were the number of registrants from outside the Region, most of which came from other Chapters along the eastern seaboard, but also included members from the Tennessee, First Illinois, Lone Star, Greater Heartland and the Northern California chapters. One of the Chapter Presidents also noted that the geographic reach of these virtual sessions could be a selling point going forward in discussions with Chapter sponsors.