



One HFMA Project Plan

March 2023

Overview

1. Project Background

Saving volunteer time and ensuring a better volunteer experience, collaborative support through One HFMA reduces duplication of effort and redundancies. This gives chapter leaders more time to focus on innovation, collaboration and increase value for members. By assigning processes to the HFMA 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

❖ Chapter/Region Webinars (events spanning 60-90 minutes)

Webinar Series (certification, Excel etc.)

❖ 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 and Handouts (if requested)
- Attendee List to Chapter Event Coordinator (if applicable)

❖ Digital Events (events with multiple sessions, spanning over 90 minutes)



- ❖ Pre-Conference
 - Request support through [this form](#)
Chapter Event Coordinator (Communication with HFMA)
 - 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
 - Recording of sessions
 - Zoom creation
 - Calendar invites with speaker links
- ❖ Day of Support
 - Technology Support for Speaker Orientation
 - If Needed:
 - Attendee List to Chapter Event Coordinator (if applicable)
 - Assist with Q&A and Chat
 - Assistance with Networking Events
 - Technical Assistance (if needed)
- ❖ 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)
 - Add presentations/recordings to Cvent webpage (if requested)
- ❖ In-Person Events
 - ❖ Pre-Conference
 - Event creation in Cvent
 - Sessions
 - Speakers
 - Registration
 - Event Webpage
 - Hotel/Travel
 - Discount codes
 - Event Webpage
 - Canva graphic creation (for social media/Save the Date)
 - Communication to attendees through Cvent



- Save the Date
 - Invitation
 - Registration Confirmation
 - Event Reminder
 - Conference App assistance
 - Attendee Hub creation (for Chapter events with 150+ attendees)
 - For events under 150 attendees, there are great options using the Cvent event site. The Cvent site can incorporate most elements that an official conference app has.
 - ◆ Certain web pages can be marked so that only attendees can view them, like speaker presentations and links to session surveys.
 - ◆ The Cvent registration site can be enhanced and signs can be printed with QR codes for attendees to scan and view all the meeting information on their phone.
 - SpotMe (available for Regional events with dedicated event/administrative planning support)
 - Contract review assistance (event venue, speaker agreement)
 - OnArrival assistance
 - Day Of Support
 - Name badge design
 - Post Conference
 - Cvent feedback survey
 - Create Certificate of Attendance/CPE Certificate (if requested)
 - Add presentations/recordings to Cvent webpage (if requested)
 - Attendee List to Chapter Event Coordinator (if applicable)
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- ❖ Annual Sponsorship Creation
 - Sponsorship creation in Cvent
 - Sponsorship levels
 - Benefits outline
 - Logo collection
 - Sponsorship webpage
 - Invoice creation
 - Sponsorship Emails
 - Sponsorship confirmation
 - Renewal notice draft
 - Balance due notification draft
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- ❖ Event Sponsorship & Exhibit Creation
 - Sponsorship creation in Cvent
 - Sponsorship levels
 - Benefits outline
 - Logo collection
 - Exhibit booth selection (if requested)
 - Sponsorship & exhibit web page
 - Invoice creation



- Sponsorship Emails
 - Sponsorship confirmation
 - Balance due notification draft

- ❖ Standalone Networking Event Set Up
 - Event creation in Cvent
 - Event description
 - Registration
 - Canva graphic creation (for social media/Save the Date)
 - Communication with attendees through Cvent
 - Save the Date
 - Invitation
 - Registration Confirmation
 - Event Reminder

- ❖ 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.

- ❖ Standalone Survey Creation

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

- ❖ Chapter Ballot Creation and Distribution

- ❖ Chapter Engagement Awards and President’s Award Ordering

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, tied to Cvent 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 as applicable
- 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

Event support requires close collaboration between the Association and the chapter/region. To ensure successful rollout of an event, the following expectations must be met by the parties involved. It is imperative that all parties take a fair and reasonable approach to event 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.
- **Provide notice of an upcoming in-person conference at least 120 days prior (notice is defined as at least having a save the date published), digital conference at least 60 days prior, and a webinar at least 45-30 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 over 90 minutes. *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 in-person conferences, the following must be provided at least 120 days prior to the event:
 - The date, time, and location of the event must be solidified. It is the responsibility of the Chapter to confirm this information directly with the venue.
 - Pricing structure for the event, refund/cancellation policy, and accepted methods of payment
 - 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
 - It is the responsibility of the chapter to follow up with sponsors regarding any needed information.
 - CPE/Certificate of Attendance requirements



- For digital conferences, the following must be provided at least **60 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](#)
 - It is the responsibility of the chapter to follow up with sponsors regarding any needed information.
 - Pricing structure for the event and accepted methods of payment
 - CPE/Certificate of Attendance requirements

- For webinars, the following must be provided at least **45-30 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

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.*)

- If all requested webinar or conference materials provided within specified timelines, commitment to provide a status update within five to seven business days 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 five to seven business days of receiving information.*
- After Cvent registration goes live, the Association will make any requested updates to registration process/event webpage within five to seven business days.
- 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, the Association will create all Zoom links at the time of Cvent event setup (assuming all needed information received from chapter/region).
- Conference App Creation
 - Chapter Events: If requested, the Association will create Attendee Hub app for events with 150+ attendees. The Association will introduce a Cvent representative who can assist the chapter with conference app population.



- Region Events: If requested, the Association will create a SpotMe app for a regional conference. SpotMe is available for Regional events with dedicated event/administrative planning support.
- **Please Note:** the Association will only assist with app population for Attendee Hub 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 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 24-48 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 the chapter/region specifies they'd like the survey email to include the event recording or presentation materials, the survey will be sent within five business days.*
- 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 Cvent event.

5. Standalone Survey Creation

For non-event related surveys, you can use [this form](#) to request a survey be created. The Association will reach out with any questions on the survey creation within five to seven business days.

6. Chapter Ballot Creation and Distribution

The Association is able to assist with setting up your chapter ballot and distributing to your membership for voting. Each year the Association will provide a link to chapter leadership that can be used to request Chapter Ballot support.

7. Chapter Engagement Awards and President's Award Ordering

Effective January 1, 2023 each chapter is required to review and submit Founders Award points for their members to HFMA by February 10 of each year. HFMA will send a Founders Award eligibility report to the Founders Contact and/or President of the chapter by January 15 each year. The chapter then must validate the report and make any needed points changes using the online reporting tool located on the [Founders Awards webpage](#) by February 10. The chapter must also sign off via a survey to indicate the validation process is complete and to provide an address the awards (including the President's Award) should be shipped to. Medal of Honor awards will be requested via a separate survey. HFMA will then send a final report to the chapter



within a week, showing the final listing of awards that were ordered. If awards need to be ordered outside of this timeframe, chapters can submit as needed and they will be ordered on a quarterly basis.

8. Specific Exclusions from Scope

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

Event support is limited to chapters/regions that submit their events within the timelines mentioned within this document. If a chapter/region does not submit within the timeframes outlined, the Association will still help with Cvent registration setup for the events and will work on the event in the order it entered the event queue. Assistance is limited to initial Cvent registration setup only; no additional services, including any post registration go-live Cvent updates, Zoom setup, CPE tracking or recording features would be provided.

The Association reserves the right to deny support if timelines are not met.