



HFMA Nebraska Chapter Strategic Plan 2023 - 2025

*Prepared by the Chapter Officers, Board of Directors, and
Committee Chairs for the Fiscal Year beginning June 1, 2023*



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Chapter Leaders

Officers

President Kyle Teel
 President-Elect Sheila Augustine
 Vice President Kayla Rhynalds
 Secretary/Treasurer Ed Finan

Board of Directors

Mike Feagler (ex-officio)
 Jess Paisley (Past President)
 Gavin Blum (2nd term /1st year)
 Jason Yungtum (2nd term/1st year)
 Dayle Harlow (1st term/2nd year)
 Oscar Gonzalez (1st term/2nd year)
 Ashley Woodward (1st term/1st year)
 Reba Burgett (1st term/1st year)

Committee Chairs

Awards/Social Dayle Harlow
 Bylaws Louise Hoffmann
 Certification Randy Hoffman and Justin Hope
 Collaboration Kyle Teel
 Communication Reba Burgett
 DCMS Kayla Rhynalds
 Financial Review Randy Hoffman
 Founders/CEU Renee Fink
 LINK Mike Feagler
 Membership Gavin Blum and Jason Yungtum
 Nominating Jess Paisley
 Policies and Procedures Louise Hoffmann
 Programming Sheila Augustine and Kayla Rhynalds
 Sponsorship Oscar Gonzalez and Joel Bahensky
 Strategic Planning Cindy Cherry, Rebekah Mussman and Sean Wolfe
 Success Award Sheila Augustine



Executive Summary

Overview

The Nebraska Chapter of HFMA will continue our mission to promote education and professional development of our members. Our Chapter's highest priority is service to our members and **sustained excellence in performance**.

Our future goals of the Chapter incorporate a balanced approach in our service to our members and the development of Chapter goals through five foundational elements: Education, Networking, Collaboration, Membership/Professional Development, and Finance. The plan applies specific goals and targets to each committee chair for attainment of those goals and implements a long-term focused marketing campaign to ensure progress is maintained.

This strategic plan outlines the framework in which the Nebraska Chapter officers, Board of Directors, and the committee chairs will operate for the upcoming fiscal year and beyond. The strategic plan that follows this executive summary outlines our mission and vision as well as our core Chapter values and our balanced approach to the future.

Chapter Mission

The mission of the Nebraska Chapter of HFMA is to promote education and professional development of our members and other healthcare professionals through ongoing educational opportunities. The following underlying core principles support our mission statement:

- Provide professional development through educational sessions offered to our members and other healthcare professionals.
- Promote professional development through certification opportunities and leadership development through active participation in Chapter leadership roles and peer interaction.
- Encourage our members and guests to interact at all Chapter social events in order to promote networking and communications.
- Promote and maintain professional and ethical standards of conduct.
- Influence health policy decisions, practices and principles, through dissemination of information and advocacy by the Chapter membership and other health care professionals.

Chapter Vision

To strengthen our position as the leading professional organization in Nebraska for individuals seeking education, professional development, networking and access to current information affecting the financial management of healthcare organizations.



Core Chapter Values

The Chapter has identified core values, which ensure that our strategic direction is in line with the ideals espoused by our profession as well as those that lead our national programs. These include:

- **Excellence:** We will continuously strive to offer the highest quality educational programs and events to our members and guests.
- **Integrity:** The Chapter will demonstrate and promote honesty, truthfulness, sincerity, trustworthiness and fairness; sticking to self-imposed high standards of ethics, principles and work quality in all Chapter affairs.
- **Inclusion:** The Chapter will promote and maintain respect, dignity and fairness for all individuals. We foster an environment of professional respect and inclusion.
- **Responsibility:** The Chapter's programs will be based on sound financial principles in accordance with our annual budget.
- **Service:** Our highest priority is service to our members, by offering educational sessions to meet their professional development needs.
- **Teamwork:** We will encourage participation by our members in Chapter leadership roles. Active participation is vital to our Chapter's relevancy and long-term success.
- **Innovation:** The Chapter will encourage new ideas from the officers, board members and chapter members. As a Chapter, we believe in being attentive to new opportunities and valuing creative solutions that will promote education and professional development.



Environmental Assessment

I. Chapter Assessment

Healthcare industry issues at both the national and local level have affected every aspect of the Nebraska Chapter. These factors have directly impacted member enrollment as well as member involvement in Chapter activities. The impact of these factors includes:

- Through the change of membership structure at the national level, the Nebraska Chapter membership has grown rapidly. Through May 17, 2023, there were 131 individual members and 728 enterprise. For comparison, prior to the expansion of the enterprise membership, FY20 included 282 individual and 9 enterprise members.
- The long-term commitment of the Chapter members is evidenced by Founder's Award winners with 61 bronze, 44 silver, 31 gold, and 10 medal of honor.

HFMA Chapter Survey Report

Members of the Nebraska Chapter participated in the recent Chapter survey report conducted by the national HFMA office. HFMA surveys a twelfth of membership monthly, with results published quarterly. Measures assess perception of member value, satisfaction, and opportunities for improvement. The Jan 2022-Jan2023 survey included responses from 142 total statewide members.

Chapter members rated membership value at an average of 3.96, slightly above the national average of 3.87. Overall satisfaction for Nebraska was a 8.33 average, with the national average at 7.81.

The survey indicated that all categories of members consider local/regional educational events to be the most valuable piece of their membership, with local/regional networking events coming in a distant second.



II. External Assessment

Political & Governmental Regulations

- Healthcare financial professionals are required to possess different skill sets especially collaboration and communication with external stakeholders.
- With the breadth and unknown changes to healthcare, it is increasingly important to stay in tune with the changes as they occur and provide updates and education to the members on the changes.
- Government regulations fail to recognize the role of hospitals versus other healthcare service providers and the impact of regulatory burden.
- There is a need to stay in tune with legislative actions and educate members on what is happening (example 340B, Rural Emergency Hospital model).
- Compliance with price transparency rules and surprise medical billing legislation.

Membership

- Due to budget constraints and industry consolidation, the chapter will need to continue to focus on affordable opportunities for members.
- Membership retention and inclusion will remain a focus.
- The Nebraska HFMA Chapter draws members from a wide geographic area.
- The Chapter must have a good process for integration of new enterprise members.
- Meeting the needs of a diverse workforce/membership continues to be a challenge.
- Staff turnover due to demographics causes challenges and loss of institutional knowledge.
- Workforce shortages across the State and Nation causing stress for facilities.
- Shift to remote working changes dynamics in membership engagement.

Technology & Innovation

- Members receiving continuous information overload (ex. HFMA Communities).
- Members accustomed to and expect access to live stream or record events.

Payment and Delivery Model Trends, Economic Trends

- Healthcare entities are getting pressures from commercial payers, employers and governmental payers.
- Because of decreased reimbursement and cost cutting measures, healthcare entities have pressures to join forces through mergers and acquisitions, networks, and affiliations.
- Healthcare entities are cutting costs and sending fewer members to attend HFMA events.
- Consumerism is impacting the healthcare industry as a result of higher deductibles, increase in patient financial responsibility, price transparency and publication of quality scores.
- Healthcare entities are experiencing difficulties recruiting staff.
- Certain healthcare markets are experiencing continuous changes in their access to commercial individual health insurance policies (ex. ACA health insurance marketplace, managed care plan growth).
- Changing payment models from FFS to value, including new payers and payment methods.
- Shifting sites of care and changing healthcare delivery models.

One HFMA

National HFMA continues making changes to improve access and information for members. A new learning platform was recently introduced to lessen the burden on volunteer leaders and enhance education and certification. New leadership at national HFMA with CEO transition.



III. Internal Assessment

An internal assessment of our Chapter yielded the following conclusions:

Strengths

- Chapter leadership
- Quality education
- Member Engagement
- Networking
- Sustained excellence
- Strategic planning
- Business Partner support
- Strong generational diversity
- Proactive education topics
- Number of subject matter experts within chapter who are willing to present

Weaknesses

- Geography
- Limited urban participation
- Increased individual membership costs and decreasing budgets
- Difficulties engaging our expanding membership base
- Transition in leadership throughout the profession
- Succession planning for leadership positions including younger leaders

Opportunities/Goals

- Increase membership value to promote inclusion and chapter growth
- Educate employers on enterprise value
- Grow Certified membership with new certification opportunities Revive communication methods and content
- High quality education tailored to our expanded membership needs/clinical and financial
- Increase coordination and member engagement through technology
- Explore collaboration with other healthcare industry organizations
- Balancing the use of technology to provide education (virtual vs in-person)
- Engaging Enterprise members
- Increase communication and value opportunities for our business partners

Threats

- Competing educational offerings
- Competing healthcare sector organizations
- Reduction in membership engagement due to use of virtual meetings and staffing shortages at their facilities
- High annual HFMA dues for individual members
- Budget cuts to pay dues and/or send employees to meetings; balance quality of venues with costs



Essential Issues – Balanced Approach

The Chapter leadership determined that even with the exceptional programs it offered the Chapter needed to maintain a focused, measurable, understandable and long-term approach to addressing the concerns of our members and to **sustaining excellence**. The Chapter Strategic Planning Committee facilitates the yearly assessment of the current strategic planning process included a review and revalidation of the Chapter's mission, vision and value statements, along with a complete review of Chapter member survey.

Through this assessment, the key “pillars” our members and their leaders valued are revalidated. These foundational pillars are identified and defined as follows:

- **Collaboration:** The Nebraska Chapter of HFMA will endeavor to engage complimentary peer organizations as part of its mission of promoting high quality education. .
- **Education:** The Nebraska Chapter of the HFMA will offer education programs to meet the needs of our broad base of membership.
- **Finance:** The Nebraska Chapter of HFMA will operate the chapter activities in a fiscally sound manner according to the direction of the Board of Directors.
- **Membership/Professional Development:** The Nebraska Chapter of HFMA will value the commitment of our members and promote professional development opportunities for our members through the use of certification programs and leadership development opportunities within the Chapter.
- **Networking:** The Nebraska Chapter of HFMA will leverage the professional and business partners of the Chapter to encourage interaction and enhance personal and professional relationships.



2023 – 2025 Strategic Initiatives

The goal with this process was the validation of the Chapter’s mission, vision and values. An intermediate goal was the development of a balanced approach in determining and prioritizing the Chapter’s long-term initiatives to ensure our resources are appropriately utilized where the membership will respond to our observed opportunities in participation in education programs and member recruitment/retention. The identification and implementation of short-term strategic initiatives assists the Chapter in obtaining its’ long-term goals and objectives. The Chapter’s short-term strategic initiatives are as follows:

Collaboration – engage and influence the larger community:

1. Create and enhance collaborative relationships including associations, payers, business partners, and providers.
2. Create collaboration opportunities with other industry trade groups/associations.
3. Collaborate to provide comprehensive educational series.. (ex. revenue cycle, new CFO, Leadership).

Education – provide timely, quality, cost-effective, relevant education programs:

1. Use technology and innovative methods to enable education.
2. Provide proactive education to a comprehensive audience.
3. Embrace foundational and emerging issue programs that align with National HFMA strategies.
4. Continue to provide meeting models that provides virtual or in-person participation.
5. Create awareness of educational opportunities for enterprise members.

Sponsorship and Finance – operate chapter activities in fiscally sound manner:

1. Focus on recruitment and retention of sponsors through demonstration of value and expanding the base.
2. Ensure financial viability of the Chapter.

Membership/Professional Development – recruit and develop members:

1. Promote certification and leadership development opportunities.
2. Focus on relevant education for a diverse membership group.
3. Continue process for succession planning for committees and leadership positions, focusing on new members and regular attendees.
4. Offer in-person and select virtual events to drive membership engagement.
5. Focus on orientating and integrating new members, especially Enterprise members.
6. Evaluate process for following up with non-renewers based on new renewal structure.

Networking – encourage interaction to enhance personal and professional relationships:

1. Ongoing communication including technology/social networking tools.
2. Keep senior leaders engaged in chapter activities.
3. Involve new members and first-time attendees in chapter activities.
4. Explore new activities for social/professional networking in a hybrid world.
5. Focus on developing and maintaining business partner relationships.



2022-2023 Operational Goals and Objectives

Collaboration

- Identify opportunities for collaboration with other industry associations/chapters to offer educational events.
- Engagement of members with dual ACHE credits.
- Hold focused education on singular topic like revenue cycle in collaboration with other organizations to help engage our enterprise members.

Communications

- Develop communication to new members on the benefits of HFMA membership.
- Reach out to Enterprise contacts on white listing CVENT domains.
- Have a condensed presentation prepared for "extra" time at conferences.
- Explore OneHFMA and other sources for assistance with publishing.
- Refresh Chapter update communication with calendar of items (Sponsor Spotlight, Education highlights, Photos from events, Leadership and new member bios).
- Coordination with Sponsorship for business partner highlights and with education committee for event highlights.

Sponsorship and Finance

- Expand the base of sponsorship members by improving value for provider sponsors.
- Work with the education committee to ensure in-person meetings to increase business partner value, including introducing the speakers and sponsor introduction or showcase/lighting round.
- Opportunities to promote sponsors in education registration process (logos on e-mails, registration page, etc.)
- Sponsor appreciation events/social.
- Explore sponsor prospect introduction process.

Education

- Collaborate with other industry associations on events to expand audience reach and member engagement.
- Promote certification opportunities in an effort to drive membership engagement.

Membership

- Encourage current leadership to recruit less involved members for committees or committee work.
- Obtain non-renewers list from National Office and distribute as part of quarterly board meetings.
- Include a networking event at every chapter meeting.
- Continue a "board member bring a non-member for free" campaign.
- Identify Key Enterprise Champions to communicate education and certification opportunities to their organization members.

Networking

- Lightning round of business partner introduction of business and/or representative.
- Strive to create value for both the members and the business partners in the activities
- Work with education to expand networking opportunities during the event; offer senior leader invites to these expanded networking events.
- Use various styles/formats of social events with different lengths and activities.