Member Value

Title: 2025 Rising Stars Program HFMA TN Chapter

Submission Type: Chapter
Submission Summary:

The HFMA TN Chapter's Rising Stars Program was developed through a deliberate needs identification process to address challenges in engaging early-career, provider-based professionals in Chapter activities.

Needs Identification

The HFMA TN Chapter's (Chapter) Rising Stars Program was developed through a deliberate needs identification process to address challenges in engaging early-career, provider-based professionals in Chapter activities. The process involved qualitative input from Chapter leadership, board discussions, and member feedback, revealing significant barriers to membership participation and leadership development.

To further validate leadership observations, the Chapter conducted a structured review of its active membership roster using join-date data (Column AB). The analysis included 4,453 active members with valid join dates. Join-year distribution among current active members reflects accelerated enrollment beginning in 2022, coinciding with Enterprise membership expansion. Early-careerist employee membership percentages were:

- 2021: 5%
- 2022: 12%
- 2023: 18%
- 2024: 33%
- 2025: 42%

This distribution confirms that the early-career segment has expanded rapidly in recent years, requiring intentional engagement and leadership development pathways. While enrollment expanded access, engagement systems had not scaled proportionally to support structured integration.

Process and Data Collection

During strategic planning sessions in early 2024, Chapter leadership identified declining engagement among new provider-based members, particularly those whose employers could not fund HFMA membership or event participation. The Chapter Board conducted informal discussions with approximately 20 provider-based members and non-members during regional meetings and the 2023 Fall Institute. These conversations targeted professionals with fewer than five years of HFMA membership to understand their participation barriers. Key questions included:

- What prevents you from joining or renewing HFMA membership?
- What financial or structural support would encourage your involvement?
- What opportunities (e.g., networking, leadership roles) are most valuable to you?

Leadership also reviewed membership data from 2021 to 2024, noting a drop in provider-based member retention compared to non-provider members, excluding Enterprise Members. While no formal survey was conducted, the qualitative feedback and retention data provided a clear picture of the challenges. Misty Brackett, the Chapter President for 2024–2025, decided to create the Rising Stars Program to address these issues.

Specific Needs Identified

The needs identification process highlighted three critical needs impacting membership:

1. **Financial Barriers:** Many early-career, provider-based professionals could not afford HFMA membership dues or event registration due to limited employer support, leading to low participation and retention.
2. **Structured Engagement Opportunities:** New members lacked clear pathways to engage in chapter activities, such as committee roles or leadership development, resulting in disengagement.
3. **Leadership Pipeline Development:** The Chapter faced a gap in its leadership pipeline, as few early-career members transitioned into committee or board roles, threatening long-term chapter vitality.

Impact on Program Design

These needs directly shaped the Rising Stars Program. To address financial barriers, the program covers membership dues and Annual Conference registration using the Gloria Adams Scholarship Fund and chapter provider scholarships. To provide structured engagement, the program implements a two-year term with mandatory committee involvement and mentoring. To build a leadership pipeline, it encourages participants to transition into roles like committee co-chairs or board members post-program. By targeting these needs, the program has onboarded five participants (Pamela Rollins, Melanie, Tim, Christina, and Octavia Quarles) and aims to engage up to five new members annually, enhancing membership retention and Chapter leadership development.

Leadership determined that rapid enrollment growth without intentional engagement pathways risked creating a participation gap between membership access and active contribution. The Chapter identified an urgent need to convert accelerated growth into sustained engagement, volunteer capacity, and leadership continuity.

Goals and Objectives

The Chapter's Rising Stars Program was designed to address three critical needs identified through leadership discussions and member feedback: financial barriers to participation, lack of structured engagement opportunities, and gaps in the chapter's leadership pipeline. The program's goals and objectives align directly with these needs, targeting early-career, provider-based professionals to enhance membership engagement and chapter vitality.

Goal 1: Increase Accessibility to HFMA Membership and Events

Related Need: Financial barriers prevent early-career, provider-based professionals from affording HFMA membership dues and event registration, leading to low participation and retention. Given that 42% of active members joined in 2025 alone, increasing meaningful participation required more than enrollment access. Financial support was intentionally structured to deepen engagement among newer members and ensure conference participation translated into leadership development opportunities.

Objective: Provide full financial support for membership dues and Annual Conference registration for up to five Rising Stars annually.

Target Audience: Early-career, provider-based professionals (less than five years of HFMA membership) whose employers cannot, or will not, fund participation.

Measurable Performance Levels: Enroll five participants annually, with 100% of participants having dues and Annual Conference registration covered by the Chapter for the two-year program term.

Challenges: Securing sustainable funding through the Gloria Adams Scholarship Fund and chapter provider scholarships requires alignment with national HFMA policies and budget constraints. Ensuring consistent employer cooperation for participant time commitments is also challenging.

Value: By removing financial barriers, the program can increase membership retention for provider-based members, strengthen chapter engagement, and provide participants with access to HFMA's educational and networking resources, enhancing their professional development.

Goal 2: Foster Structured Engagement Through Committee Involvement

Related Need: New members lack clear pathways for active involvement, resulting in disengagement from Chapter activities. With membership composition shifting rapidly beginning in 2022, the Chapter recognized that organic engagement would not occur at sufficient scale. Structured committee placement within three months was designed to ensure early integration rather than passive membership.

Objective: Place 100% of Rising Stars participants on at least one Chapter committee each year, with opportunities to rotate or expand roles in Year 2.

Target Audience: Rising Stars participants (currently Pamela Rollins, Melanie, Tim, Christina, and Octavia Quarles).

Measurable Performance Levels: Achieve 100% committee placement within three months of onboarding and ensure 80% attendance at committee meetings annually.

Challenges: Identifying suitable committee openings and matching participant skills/interests requires coordination across board guides, with strategic meetings planned at regular intervals. Balancing participant workloads with committee responsibilities may also pose difficulties.

Value: Active committee involvement builds practical skills, fosters a sense of belonging, and increases long-term member retention, strengthening the Chapter's operational capacity and member-driven initiatives.

Goal 3: Build a Sustainable Leadership Pipeline

Related Need: The Chapter faces a gap in transitioning early-career members into leadership roles, threatening long-term vitality. Historically, leadership progression relied on informal pathways. The Rising Stars Program formalized succession preparation to ensure that accelerated membership growth produced board-ready leaders within defined timeframes rather than multi-year passive participation.

Objective: Transition at least 50% of Rising Stars participants into advanced roles (e.g., committee co-chair, board member) within one year of program completion.

Target Audience: Rising Stars participants completing the two-year program.

Measurable Performance Levels: By 2026, at least two of the current five participants assume leadership roles, with annual tracking of post-program involvement.

Challenges: Encouraging participants to take on leadership roles requires ongoing mentoring and overcoming potential hesitancy due to inexperience. Ensuring Chapter resources support long-term mentoring adds complexity.

Value: A robust leadership pipeline ensures the Chapter's sustainability, enhances Chapter governance, and positions participants as role models, inspiring future cohorts and adding value to the broader HFMA community.

Overall Impact: Achieving these goals will transform the Chapter by increasing provider-based member participation, fostering active engagement, and securing a steady flow of capable leaders. The program's success will enhance the Chapter's reputation as an inclusive, forward-thinking organization, delivering value to members, their employers, and the healthcare finance industry.

Methodology

The Chapter's Rising Stars Program employs targeted methods to address its goals and objectives: increasing accessibility to HFMA membership and events, fostering structured engagement through committee involvement, and building a sustainable leadership pipeline. These methods, implemented by Chapter leadership, board members, and participants, directly respond to the identified needs: financial barriers, lack of engagement pathways, and leadership pipeline gaps.

The Chapter committed approximately $5,000 annually in direct financial investment and more than 600 cumulative volunteer hours across board coordination, committee service, and mentorship activities. This level of resource allocation reflects deliberate, measurable action aligned directly to identified needs.

The program model is intentionally replicable. Chapters seeking to implement a similar initiative require:

1. Defined eligibility criteria
2. Designated funding source
3. Structured onboarding session
4. Committee placement tracking mechanism
5. Quarterly mentor check-ins

The Chapter's documentation, onboarding outline, and tracking templates provide a framework adaptable to other HFMA chapters.

Goal 1: Increase Accessibility to HFMA Membership and Events

Objective: Provide full financial support for membership dues and Annual Conference registration for up to five Rising Stars annually.

Methods:

- **Who:** The program is overseen by the Chapter board, with Becca Meredith (program coordinator) and Kathryn Topper (financial oversight) leading funding allocation. Five participants (Pamela Rollins, Melanie, Tim, Christina, and Octavia Quarles) are currently enrolled.
- **How Many:** Five participants receive funding, supported by approximately 10 board members and two volunteers coordinating logistics.
- **How:** Funds from the Gloria Adams Scholarship Fund and provider scholarships cover membership dues and Annual Conference registration. Marcus Green reviews funding policies with National to ensure compliance, with updates discussed regularly. Volunteers verify participant eligibility and contact details.
- **What:** Funding covers 100% of dues and registration costs for the two-year term. Participants are onboarded via a July group call to confirm benefits and expectations.
- **When:** Funding allocation began in mid-2024, with policy reviews and onboarding by July. Annual funding renewals occur each fiscal year.
- **Resources Expended:** Estimated annual cost: $5,000 ($1,000 per participant x 5). Volunteer hours: 20 hours for policy review, 10 hours for participant coordination, and 5 hours for onboarding call planning. Total: ~35 volunteer hours.
- **Evidence of Effort:** Chapter volunteer call notes document funding discussions and participant verification tasks. The program overview outlines eligibility and benefits, serving as a promotional tool.

Goal 2: Foster Structured Engagement Through Committee Involvement

Objective: Place 100% of Rising Stars participants in at least one Chapter committee each year.

Methods:

- **Who:** Board members (10–12 members) identify committee openings, with board members facilitating placements. Five Rising Stars participants are assigned roles.

- **How Many:** Five participants, supported by 10–12 board members and committee chairs (estimated 15 total).
- **How:** Board members submit committee sizes and openings by June 20, 2025, for discussion at a strategic meeting. Board members match participants' skills/interests to roles (e.g., education or membership committees). Participants attend committee meetings (virtual or in-person) and contribute to tasks like event planning or member outreach.
- **What:** Each participant serves on one committee, with Year 2 offering role rotation or expansion. Simple volunteer tasks (e.g., registration desk support) are explored for Annual Conference and Kelly Miller Road Shows.
- **When:** Placements are finalized by October, with ongoing committee involvement through the following year. Volunteer task list development is due by October.
- **Resources Expended:** Volunteer hours: 15 hours for committee placement planning, 10 hours for matching and coordination, and 50 hours annually per participant for committee work (5 participants x 10 hours/month x 12 months). Total: ~575 volunteer hours annually.
- **Evidence of Effort:** The project tracker assigns committee placement tasks, with a strategic meeting agenda.

Goal 3: Build a Sustainable Leadership Pipeline

Objective: Transition at least 50% of Rising Stars participants into advanced roles within one year of program completion.

Methods:

- **Who:** Board members provide mentoring and leadership guidance. Five participants are mentored for future roles.
- **How Many:** Five participants, supported by 5–7 board mentors and two coordinators.
- **How:** Regular check-ins (quarterly calls) and mentoring sessions guide participants toward leadership roles. Year 2 includes exposure to advanced roles (e.g., committee co-chair). Post-program, board members nominate participants for leadership positions.
- **What:** Mentoring includes goal-setting, leadership training, and role shadowing. The Rising Stars Onboarding call emphasizes leadership expectations.

- **When:** Mentoring begins in July, with check-ins throughout the two-year enrollment. Leadership transitions are targeted for 2027–2028.
- **Resources Expended:** Volunteer hours: 20 hours for onboarding and mentoring planning, 40 hours annually for mentoring (5 mentors x 2 hours/month x 4 participants). Total: ~60 volunteer hours annually.
- **Evidence of Effort:** The project tracker notes the onboarding call. Mentoring guidelines are included in the program overview.

Summary: The Rising Stars Program's methods—funding support, committee placements, and mentoring—directly address and improve the goals and objectives of the Chapter's Rising Stars Program.

Evaluation and Results

The Chapter's Rising Stars Program evaluates its impact on Chapter members and the broader healthcare finance community by measuring progress toward its goals and objectives: increasing accessibility to HFMA membership and events, fostering structured engagement through committee involvement, and building a sustainable leadership pipeline.

Performance levels were measured through a combination of roster trend analysis, budget tracking, committee attendance logs, structured participant surveys using a 1–5 Likert scale, and documented mentor feedback. Data was reviewed quarterly to assess progress toward stated objectives. The increase from 3.2 to 3.8 on the leadership confidence scale represents a 19% improvement in self-reported leadership readiness within the first program cycle.

Evaluation Methods and Data Collection

Financial Support Tracking:

- **Instrumentation:** Budget reports and participant records tracked funding allocation for membership dues ($400/participant/year) and Annual Conference registration ($600/participant/year).
- **Data Collection:** The program coordinator maintained a spreadsheet documenting funding disbursed for each of the five participants.
- **Analysis:** Compared actual expenditures against budgeted amounts to confirm 100% coverage for all participants.

Committee Involvement Monitoring:

- **Instrumentation:** Committee attendance logs and activity reports submitted by committee chairs.
- **Data Collection:** Board guides noted attendance data for the five participants, targeting 80% meeting attendance and active contribution. Data is compiled monthly.
- **Analysis:** Calculated attendance rates and reviewed qualitative feedback on participant contributions.

Leadership Pipeline Assessment:

- **Instrumentation:** Participant progress surveys and mentor check-ins.
- **Data Collection:** Participants completed a brief survey during the onboarding call, rating their leadership development confidence (1–5 scale). Mentors provided qualitative feedback on participant readiness for advanced roles.
- **Analysis:** Aggregated survey scores and synthesized mentor feedback to gauge progress toward the 50% leadership transition target.

Participant Feedback:

- **Instrumentation:** Feedback forms distributed post-onboarding asked participants about program benefits, engagement, and suggestions.
- **Data Collection:** All five participants submitted responses.
- **Analysis:** Responses were categorized to identify common themes (e.g., value of networking, committee experience).

Results

Goal 1: Increase Accessibility to HFMA Membership and Events

- **Performance Level Attained:** 100% achieved. All five participants had membership dues ($2,000 total) and Annual Conference registration ($3,000 total) covered for 2025–2026.
- **Impact:** Enabled five provider-based professionals to join HFMA, increasing provider membership by 5% compared to previous year.

Goal 2: Foster Structured Engagement Through Committee Involvement

- **Performance Level Attained:** 100% placement achieved, with all five participants assigned to committees. Attendance averaged 85% across all meetings, exceeding the 80% target.
- **Impact:** Enhanced Chapter operations through participant contributions and increased member engagement. Participants reported a 4.2/5 satisfaction score with committee roles.

Goal 3: Build a Sustainable Leadership Pipeline

- **Performance Level Attained:** Early indicators are positive. Initial survey showed an average leadership confidence score of 3.8/5, up from 3.2/5 pre-program. Mentors noted participants' readiness for co-chair roles by Year 2.
- **Impact:** Strengthened leadership potential, with two participants expressing interest in board roles post-program.

Value to the Chapter:

- Increased Membership: 5% growth in provider-based membership enhances Chapter diversity and vitality.
- Improved Engagement: Committee contributions have boosted event planning capacity, with 10% higher volunteer support projected for Fall 2025.
- Leadership Development: Early leadership confidence gains ensure a robust pipeline, securing the Chapter's future governance.
- Member Satisfaction: Feedback forms indicate 90% participant satisfaction with networking and professional growth opportunities.
- Community Visibility: The program positions the Chapter as an inclusive leader in healthcare finance, inspiring other chapters.

Data Appendix – Membership Analysis Methodology

Data Source: HFMA TN Chapter Active Membership Roster
Field Utilized: Join Date (Column AB)
Total Active Members Analyzed: 4,453

Join-Year Distribution of Early-Careerist Members:

- 2021 – 5%

- 2022 – 12%
- 2023 – 18%
- 2024 – 33%
- 2025 – 42%

Percentages reflect distribution of current active members by join year and were calculated to identify membership composition trends following Enterprise enrollment expansion beginning in 2022.

Evaluation Instruments:

- Committee attendance logs
- Budget tracking spreadsheet
- Leadership confidence survey (1–5 scale)
- Participant satisfaction feedback form

Multi-Chapter CRCR Virtual Study Hall

Submission Type:

- Multi-Chapter

Metro-Philadelphia, Michigan Great Lakes, Oklahoma, New Jersey, Tennessee, Alabama, South Carolina, Georgia

Submission Summary:

Georgia HFMA wanted to expand its success and efforts for CRCR Certification Completion after offering a virtual study hall to other chapters within multiple regions. The goal was to illustrate the positive impact study halls have on increased CRCR certification completions amongst members.

Needs Identification

One key factor in the continued evolution of the healthcare industry is the need for ongoing professional development, education, and the ability to demonstrate competency in revenue cycle and financial acumen through certifications. HFMA offers many certifications free of charge to its members, allowing them to enhance their knowledge, expertise, and visibility for future roles and promotions. These certifications are highly valuable to health systems, business partner organizations, and positively impact the patient financial experience.

With the CRCR being a member benefit, the Georgia Chapter, along with other chapters, identified the value of offering virtual study halls to increase certification completion. The sessions, scheduled from July 10, 2025, through August 14, 2025, were designed to supplement HFMA's free online certification resources, providing additional structured training and support. This initiative aimed to increase member certification completion, engagement, and overall professional development.

Georgia HFMA has been hosting CRCR Virtual Study Halls since 2024, with attendance growing from 51 participants in 2024 to 231 in 2025. This focus has allowed the chapter to surpass the Total HFMA Certified Members percentage for FY26, reaching 25.80%. Currently, 73% of all member certifications in the Georgia Chapter are CRCRs, highlighting the effectiveness, engagement, and awareness generated by the virtual study halls.

Recognizing the broader impact of professional development across regions, Georgia HFMA collaborated with multiple chapters to share and offer the CRCR Virtual Study Hall materials. By doing so, they aimed to increase certification completion and engagement in other chapters, strengthening the nationwide healthcare workforce by equipping members with advanced knowledge and skills.

Goals and Objectives

Goal 1: Increase Engagement in Certifications
The first goal was to provide members with a platform for collaboration, focused study, and hyper-targeted review of CRCR material and questions. Feedback from members indicated that self-learning alone did not instill confidence to pass the certification, highlighting a need for structured learning experiences. The objective was to achieve an attendance rate of at least 3% of all invited members.

Goal 2: Maximize CRCR Certification Completion
The second goal was to replicate the successful virtual training platform across chapters, increasing CRCR certification completion and promoting professional development. Georgia HFMA shared its methodology with other chapters to enhance business partner and provider engagement while benefiting the healthcare industry across multiple states. The target was to increase each chapter's CRCR certification completion rate by at least 1%.

Goal 3: Increase CRCR Conversion Rate Post-Study Halls
The third goal focused on demonstrating that attendees of structured CRCR Virtual Study Halls would complete certifications at higher rates and within shorter timeframes. The objective was to achieve a conversion rate of at least 40% for attendees completing their CRCR certifications.

Methodology

Georgia HFMA partnered with Michigan, Oklahoma, Tennessee, Alabama, South Carolina, New Jersey, and Metro-Philadelphia Chapters to offer a six-week CRCR Study Hall Series virtually to all members.

The series consisted of six weekly one-hour sessions focused on revenue cycle content and exam preparation. Each participant could earn one CPE credit per session. Sessions included live Q&A interactions with actionable tips and study recommendations and a comprehensive review of all CRCR exam topics, including Patient-Centric Revenue Cycle, Pre-Service Financial Care, Time-of-Service Financial Care, and Post-Service Financial Care. Sessions took place every Thursday from July 10, 2025, to August 21, 2025.

The training was hosted and materials were created by William Bill Rodgers, with chapter support to facilitate polling and engagement during sessions. The planning committee included Tina Stone (Michigan), Amina Razanica (New Jersey), Steve Lufty (South Carolina), Beth Erten (Florida), Rhianna Gentry (Alabama), Meghan Campbell (Tennessee), Kristen Weetenkamp (Metro Philadelphia), and Katharine Johnston (Oklahoma).

Evaluation and Results

Over the six-week series, there were 257 attendees across eight chapters.

Goal 1: Increase Engagement in CRCR Certifications
The study hall achieved a 4.2% attendance rate among 5,512 email invitees, surpassing the target of 3%.

Goal 2: Maximize CRCR Certification Completion
Each participating chapter experienced an overall increase in CRCR completions of 0.5% to 1% of active chapter membership, with the highest increases observed among enterprise membership participants.

Goal 3: Increase CRCR Conversion Post-Study Halls
Among members who attended the virtual study halls, 88% successfully completed their CRCR certifications. The additional certifications earned across chapters included:

- Georgia: 76 additional CRCR certifications
- Tennessee: 61 additional CRCR certifications
- Alabama: 19 additional CRCR certifications
- South Carolina: 50 additional CRCR certifications
- Metro-Philadelphia: 74 additional CRCR certifications
- Michigan: 197 additional CRCR certifications (direct correlation to the course not fully verifiable)
- Oklahoma: 36 additional CRCR certifications
- New Jersey: 11 additional CRCR certifications

Strengthening Multi-Region Collaboration Through a CHFP “Weekend Warrior” Bootcamp

Submission Summary:

Building on Regions 8 and 10’s award-winning CRCR Bootcamp, this second-year collaboration launched a CHFP “Weekend Warrior” Bootcamp to create a sustainable certification pathway, deepen multi-region alignment, and advance member growth through focused sessions, exam support, and national speakers.

Submission Type: Multi-Region

Region 8 and Region 10

Needs Identification

Building on the success of Regions 8 and 10’s award-winning multi-region CRCR Bootcamp collaboration, this second-year initiative expanded professional development opportunities by focusing on the Certified Healthcare Financial Professional (CHFP) certification. Maintaining the same participating regions allowed leadership to intentionally deepen collaboration, refine execution, and strengthen alignment across chapters. Rather than treating the CHFP initiative as a stand-alone program, Regions 8 and 10 positioned it as the next step in a sustainable certification pathway designed to support long-term member growth and leadership development.

The CHFP Bootcamp was delivered using a “Weekend Warrior” model that offered spaced, high-impact sessions tailored for engaged members willing to dedicate focused personal time toward meaningful career advancement. Through a nationally diverse speaker lineup, structured exam-readiness support, and visible recognition of certified members, this initiative reinforced the value of certification while further establishing Regions 8 and 10 as leaders in scalable, multi-region engagement.

Following the success of the prior year’s CRCR Bootcamp, leadership from Regions 8 and 10 evaluated member engagement patterns, certification trends, and informal participant feedback to determine how to build on existing momentum. While the CRCR initiative successfully introduced certification to many members, there was a clear need to provide advanced opportunities for those seeking continued professional growth. Interest increasingly shifted toward the CHFP certification, which offers broader financial leadership competencies and aligns with members’ long-term career goals.

Member feedback indicated that accessing the CHFP resources was often confusing and not always intuitive. In response, we identified this need and developed a concise reference sheet to help guide members through the process and improve overall ease of access. Many members struggle with finding the path to get started and finding the resources necessary on the course.

At the same time, leadership recognized the importance of retaining and further investing in members who had already demonstrated a willingness to dedicate time and effort toward certification. These engaged members represented a critical segment of the HFMA community whose continued development would strengthen both chapter leadership pipelines and overall member value. Additionally, after a successful first year of collaboration, Regions 8 and 10 identified an opportunity to move beyond initial coordination and instead strengthen leadership alignment, communication, and shared ownership across a second consecutive year. Finally, feedback reinforced the need for flexible scheduling that allowed members to balance professional responsibilities while maintaining momentum toward certification completion. These needs directly shaped the design and objectives of the CHFP Bootcamp.

Goals and Objectives

The overarching goal of the CHFP Bootcamp was to build upon prior multi-region success by delivering a high-impact professional development experience that advanced member leadership skills, strengthened cross-region collaboration, and supported CHFP certification attainment. Regions 8 and 10 sought to provide an experience that was challenging, meaningful, and clearly aligned with long-term career development rather than a one-time educational event.

The initiative was designed specifically for engaged HFMA members across both regions who were willing to dedicate weekend time toward certification efforts. By adopting a spaced “Weekend Warrior” format, the program intentionally balanced rigor and flexibility, allowing participants time between sessions to study, apply content, and prepare for testing. Additional objectives included expanding leadership involvement through a new and diverse group of nationally respected speakers, improving participant success by repeatedly addressing testing requirements and registration processes, and reinforcing the value of certification through intentional recognition of members who successfully completed the CHFP process.

Methodology

To accomplish these goals, Regions 8 and 10 implemented a structured and collaborative approach to program design, promotion, and delivery. The CHFP Bootcamp curriculum was aligned with HFMA certification requirements and delivered through three virtual sessions scheduled on separate dates. This spacing allowed participants time to absorb material and prepare for the two-part CHFP examination while maintaining momentum throughout the program. The “Weekend Warrior” theme was intentionally integrated into program messaging to emphasize focused effort and timely completion.

The educational experience was strengthened through the involvement of a new lineup of respected HFMA leaders representing multiple chapters, regions, and healthcare organizations. Speakers brought practical expertise and diverse perspectives, enhancing both the quality of instruction and the national connectivity of the program. Throughout each session, leadership intentionally incorporated exam-readiness messaging at the beginning, middle, and end of the agenda. This ensured participants clearly understood not only the content but the full certification process, including testing requirements and registration steps, which improved confidence and preparedness.

Promotion and accessibility were also key components of the methodology. A professionally designed event flyer outlined session dates, topics, speakers, certification expectations, and the “Weekend Warrior” concept, while emphasizing that the bootcamp was free and open to all HFMA members. By removing financial and geographic barriers, Regions 8 and 10 were able to broaden participation and reinforce HFMA’s commitment to accessible, high-value member education.

Evaluation and Results

The CHFP “Weekend Warrior” Bootcamp was delivered on July 18, July 22, and July 30, 2025, and generated strong participation and measurable certification outcomes across Regions 8 and 10. A total of 373 members registered for the virtual bootcamp, confirming strong demand for advanced certification opportunities and validating the effectiveness of a structured, multi-region CHFP pathway.

CHFP totals in this evaluation include members holding either the CHFP credential or the Fellow of HFMA (FHFMA) designation. Because CHFP is a prerequisite to becoming a Fellow, members who advance to FHFMA do not always appear separately as CHFP-certified in reporting. Including both designations ensures the results accurately reflect certification progress.

This approach also highlights the role of the CHFP “Weekend Warrior” Bootcamp as a key step in a longer-term certification and leadership pathway. By helping members achieve

CHFP, the bootcamp positions them to pursue Fellow status as a next goal—supporting continued engagement, leadership development, and sustained involvement in HFMA.

Evaluation focused on certification attainment, regional growth, and chapter-level impact following program completion. As a direct result of the bootcamp, 132 CHFP certifications were earned after January 1, 2025, across Regions 8 and 10. When combined with existing certifications, the total number of CHFP-certified members across both regions increased from 482 to 614, representing a net gain of 132 certifications and an overall 27.4% increase.

Region 8 and 10 Certification Stats

- **Region 8:** Starting CHFP – 292 | Ending CHFP – 353 | Total increase – 61 (20.8%)
- **Region 10:** Starting CHFP – 190 | Ending CHFP – 261 | Total increase – 71 (37.4%)
- **Combined Total:** 132 CHFPs | 27.4% increase across both regions

Region 10 demonstrated particularly strong results, achieving a 37.4% increase in CHFP certifications, while Region 8 experienced steady growth despite a higher baseline. These outcomes highlight the adaptability of the bootcamp model across regions with varying chapter sizes, geographic diversity, and certification maturity.

Beyond certification counts, the CHFP “Weekend Warrior” Bootcamp demonstrated meaningful impact on how participants apply financial leadership within their organizations—particularly in rural and critical access settings. Participants consistently reported increased confidence in connecting financial strategy to operational and clinical decision-making.

Kolton Hewlett, CFO at Cass Health, a Critical Access Hospital in Iowa and a successful CHFP Bootcamp participant, described how the certification supports his leadership approach:

“I like to think of my role as CFO as being a bit of a financial translator. It’s not just about knowing the numbers; it’s about making them meaningful and accessible to everyone I work with—whether that’s our board, clinical staff, revenue cycle team, or leaders. I want our revenue cycle and finance teams to clearly understand how their work connects to the patient experience in real, tangible ways. And I want our clinical teams to see financial strategy not as a barrier, but as a partner in delivering high-quality care. When we operate from shared understanding and common goals, we’re stronger—and ultimately, our patients and communities benefit the most.”

This feedback reflects the broader intent of the CHFP Bootcamp: to equip healthcare finance leaders with the skills to bridge financial strategy, operational execution, and patient-centered care. The inclusion of participants from critical access hospitals and rural communities further underscores the program's relevance and its ability to strengthen financial leadership where resources are limited and impact is greatest.

To further assess engagement and ensure the program was meeting participants where they were in their certification journey, interactive polling questions were incorporated throughout the bootcamp sessions. These real-time polls provided valuable insight into participant readiness, experience levels, professional roles, and geographic representation, while also increasing interaction in a virtual environment.

Polling results demonstrated that the CHFP "Weekend Warrior" Bootcamp attracted a highly experienced audience, with nearly half of participants reporting more than 13 years in healthcare financial management and an additional 23% reporting 8–12 years of experience. Participants represented a broad cross-section of healthcare finance roles, including accounting and finance (36%), revenue cycle management (19%), patient financial services (12%), executive leadership (14%), and other related functions (20%). This diversity reinforced the relevance of the CHFP curriculum across multiple functional areas and leadership levels.

Importantly, polling confirmed the program's national reach. Participants reported representation from all HFMA Regions (1–11), extending the impact of the initiative well beyond Regions 8 and 10 and highlighting the scalability and appeal of the bootcamp model across the HFMA community.

Readiness-focused polling also validated the structure and pacing of the "Weekend Warrior" approach. While only a small portion of participants indicated they were immediately ready to sit for the CHFP exams, the majority reported either needing additional preparation or feeling confident that the bootcamp would position them to successfully pursue certification. These insights reinforced the value of spaced sessions, repeated exam-readiness messaging, and structured support embedded throughout the program.

To further extend accessibility and reinforce learning, all bootcamp sessions were recorded and made available on the HFMA YouTube page. At the time of this submission, Session 1 had received 57 views, Session 2 had 18 views, and Session 3 had 29 views. These view counts indicate that the program's reach continued beyond the live sessions, while also providing participants with the ability to revisit and reinforce key concepts as they progressed through exam preparation.

The success of the CHFP Bootcamp was further validated through national recognition. The initiative and its multi-region collaboration were featured in HFMA Magazine (October–

November 2025), providing external confirmation of the program’s innovation, scalability, and effectiveness.

By intentionally evolving a proven multi-region model rather than creating a one-time event, Regions 8 and 10 established a sustainable, repeatable CHFP certification pathway that strengthens member value, supports leadership development, and provides a scalable framework for future multi-region initiatives.

Mission Impact

Submission Title:

Achieving Mission Impact through Event and Education Collaboration with Statewide Associations

Submission Summary:

In summary, the primary goal was to build partnerships with other Iowa healthcare associations to expand our reach to other healthcare professionals, to provide additional educational opportunities as requested in the chapter survey, and to have broader membership participation in local events.

Submission Category:

- Mission Impact

Submission Type:

- Chapter

Needs Identification

On May 16, 2025, the Iowa Chapter met for the annual planning session. The chapter leaders reviewed HFMA's purpose, the June 2024–2025 Chapter Membership survey, the HFMA Outlook Survey Report from Winter 2024–25, the chapter cash sources and uses, and the chapter success plan category definitions.

The Healthcare Financial Management Association (HFMA) purpose is to advance the profession and industry by providing relevant education and professional development opportunities, building and supporting coalitions with other healthcare associations to achieve consensus on solutions for the challenges facing the U.S. healthcare industry, ensuring accurate representation of the healthcare finance profession, educating a broad spectrum of key industry decision makers on the intricacies and realities of maintaining fiscally healthy healthcare organizations, and working with a broad cross-section of stakeholders to improve the healthcare delivery system by identifying and bridging gaps in knowledge, best practices, and standards.

The Iowa Chapter Membership survey for June 2024–2025 gave chapter leaders clear direction on member needs. Members were asked to provide feedback on ways for chapter improvement. The overall response rate was 64% for education. All member categories listed education as the top area for improvement. The second response was communication at 33%.

The chapter membership survey also directed members to “Rank the value of each of the following aspects of chapter membership only.” The highest rank for the Iowa Chapter was local/regional educational events. All categories of partners had local/regional educational events as their top value except for non-Enterprise business partners.

The chapter membership surveys do not directly request suggestions for educational content, so the leaders used the HFMA Outlook Survey Report to find trends for educational content. The slides reviewed covered the change in average days in AR and net patient revenue, the projected change in employment over the next three months, and the types of products or services surveyed organizations will be investing in or purchasing within the next 12–18 months. Among the top five categories, two stood out: Artificial Intelligence and Patient Accounting/Revenue Cycle Systems. The chapter decided to focus on these two topics due to the January 2025 conference where facilities design, construction, and management were covered. The chapter felt analytics could fall under AI and patient accounting/revenue cycle systems. Recruiting and retaining talent had a similar response and would involve human resources and nursing.

The chapter financial statements are always reviewed, but the information was compiled to show the use of chapter dollars over the past three years. The chapter spent on average 30% of funds on membership conferences/women’s conference in 2025. This includes venue, audio needs, food, and speaker costs. The remainder of the revenue was spent on leadership training and meetings, networking, other, or added to cash reserves. The chapter leadership determined more revenue should be utilized for membership activities. The Iowa Chapter has a strong cash reserve, so any additional revenue should be reinvested in chapter members. After this discussion, the treasurer applied the information to the 2026 budget. The 2026 budget has 45.9% of projected revenue allocated to membership meetings, a 15.9% increase from the prior year.

The meeting continued by using the information above plus information from the 2025 Leadership Summit chapter meeting to brainstorm ideas for the 2026 Chapter Success Plan. The chapter leaders presented ideas and identified whether each idea aligned with member value (MV), chapter excellence (CE), mission impact (MI), or was a tool used to gather data (T). The team identified AI compliance, Iowa Hospital Association sessions on finance and clinical communication and collaboration, and best practices for revenue cycle and registration as membership value items, and collaborating with the Iowa Hospital Association for mission impact. The leaders summarized the list into three success plans for 2026: CHFP Free Bootcamp (MV), increasing membership value by improving provider engagement (CE), and IHA & IHLA partnership (MI). The IHA & IHLA partnership will also impact membership value through AI and patient accounting/revenue cycle systems. Mission impact team members were identified as Brian, Megan, Zak, Ashley, and Hilary.

Goals and Objectives

The primary goal was to build partnerships with other Iowa healthcare associations to expand reach to other healthcare professionals, provide additional educational opportunities as requested in the chapter survey, and increase broader membership participation in local events. The leaders agreed to partner with two Iowa healthcare associations: Iowa Healthcare Leaders Association and the Iowa Hospital Association.

Objectives

The objective for the partnership with IHLA was to invest chapter dollars to provide more educational opportunities to members. Specifically, by working with a broad cross-section of stakeholders to improve the healthcare delivery system by identifying and bridging gaps in knowledge, best practices, and standards. This was measured by the amount budgeted and spent during the IHLA partnership. Another objective was to expand HFMA's reach to other healthcare professionals, measured by attendee job functions. Action steps included signing a memorandum of understanding, agreeing to and marketing the discount to Iowa HFMA members, marketing the program, assisting day-of event execution, and surveying participants after the event.

The objective for the Iowa Hospital Association partnership was to participate in the October 2025 annual conference and the January and April 2026 conferences to provide additional educational opportunities, specifically on AI and patient accounting/revenue cycle systems. This was measured by educational content presented at each conference. Another objective was expanding reach to other healthcare professionals, measured by registration lists. A third objective was increasing broader membership participation in local events, including Enterprise members. This was measured by registration data and member roles. Venue savings were also measured by cost differences between locations.

Action steps included coordinating dates, speakers, food, marketing, and surveys with IHA collaboration.

Methodology

The Iowa Healthcare Leaders Association (IHLA) purpose is to promote professional growth and development and visibility of medical group managers, provide targeted educational opportunities, support information sharing among members, and maintain advocacy with organizations affecting healthcare delivery and funding. IHLA serves medical group managers, whereas HFMA provides value as a leading healthcare finance organization working across stakeholders to improve the healthcare delivery system.

The Iowa Chapter leadership rotation begins with the Vice President, who also serves as programming committee chair. Work for this role begins prior to formal induction in April. The incoming Vice President began discussions with IHLA in October 2024, reviewing a sample MOU. Conversations continued through early 2025, including speaker proposal discussions prior to the January board meeting.

The programming chair brought the proposal to the board in January 2025, where concerns were raised about fit for hospital versus clinic audiences. A call was held in February 2025 with the speaker and providers to address concerns. Additional Iowa HFMA hospital revenue cycle professionals were consulted. It was determined the program was applicable to both hospital and clinic settings, as both face denial management challenges.

Discussions continued at the April board meeting and May planning session. The MOU was signed in June 2025. The cost of the program was $449 per individual. The board decided to subsidize registration to $150 for Iowa HFMA members. Marketing for the subsidy began in August and continued through the October event date.

The second objective was partnering with the Iowa Hospital Association by continuing collaboration at annual meetings, using IHA space and technology for conferences, leveraging resources for speaker identification, and expanding marketing reach.

The Iowa Hospital Association reimagines healthcare in Iowa for life-changing outcomes through advocacy, education, and data. Its strategic initiatives include financial strength, workforce development, and healthcare innovation, including AI. HFMA's purpose and IHA's initiatives align, reinforcing collaboration.

For several years, Iowa HFMA has partnered with IHA during its annual meeting, sponsoring a finance track attended by CEOs, CFOs, nurse leaders, and other healthcare professionals across Iowa.

Outside of fall conferences, Iowa HFMA previously held events at the Hilton Garden Inn in Urbandale, Iowa. These required significant logistical effort, including technology setup, audiovisual costs, and volunteer coordination.

For the 2025 winter meeting, the chapter trialed hosting at the IHA conference center in Des Moines, which provided improved technology, reduced risk, and reduced volunteer burden. The facility included integrated sound and projection systems and improved attendee experience.

IHA communication channels also helped expand marketing reach to hospital leaders at no cost.

For the spring 2025 conference, the chapter returned temporarily to the Hilton Garden Inn due to contractual obligations. The board ultimately began planning a continued partnership with IHA based on cost, efficiency, and reach.

IHA's 2025 annual meeting included a finance track covering payer challenges, Medicare Advantage updates, and healthcare transformation topics. The 2026 winter conference focused on AI and aligned with both HFMA survey findings and IHA strategic priorities.

Evaluation and Results

The first objective was met through partnership with IHLA. The chapter supported a program called Denial$ to Dollar$, with a budget allocation of $10,000. The program included subsidized attendance for Iowa HFMA members. Attendance included a mix of enterprise members, professional members, and organizational leaders across revenue cycle roles, as well as additional IHLA attendees from clinic operations. This demonstrated expansion of HFMA's reach.

Post-event survey results showed strong satisfaction, with responses rated superior, good, and acceptable. Feedback highlighted value, peer interaction, and practical takeaways.

Member feedback indicated strong impact, including improved understanding of payer processes, appeals, and regulatory guidance, leading to improved denial outcomes and operational performance.

Lessons learned included securing guaranteed slots upfront to reduce cost risk.

Overall, the partnership met objectives of expanding reach and increasing educational opportunities.

The second objective involved partnership with the Iowa Hospital Association. Using IHA space and technology reduced costs and volunteer burden and increased investment in member education. Comparing 2026 and 2025 events, the chapter achieved approximately $2,500 in savings.

Additional benefits included reduced risk of technology failure, improved attendee engagement, and enhanced networking opportunities.

Attendance trends:

Spring 2024 – 60 attendees
Winter 2025 – 66 attendees
Spring 2025 – 91 attendees
Winter 2026 – 75 attendees

These data show no growth in broader membership participation and a decline in enterprise member attendance.

Survey results for the 2026 winter conference were highly positive, with an overall rating of 9.53/10. Feedback emphasized strong programming, relevance, and value of the location and agenda.

Feedback from Iowa Hospital Association leadership confirmed the strength of the partnership and continued collaboration.

Lessons learned included ensuring contract clarity regarding marketing support and addressing enterprise member engagement gaps.

Summary

The chapter met its primary goal of expanding partnerships with Iowa healthcare associations, successfully partnering with IHLA and IHA. Educational offerings were expanded, including additional programming focused on revenue cycle systems and artificial intelligence. While broader membership participation goals were not fully achieved, gaps were identified in enterprise communication, and corrective actions were initiated. These efforts continue to align with HFMA's purpose of advancing healthcare finance through education, collaboration, and system improvement.

Submission Title:

Bridging the Pacific: Uniting Chapters for Leadership Equity & Inclusive Allyship

Submission Summary:

On Oct 16, 2025, HFMA Hawaii & Oregon transcended boundaries with "Women and Allies Conference." Championing leadership equity, the event achieved 4.67/5 satisfaction, $3.7k+ net profit, and $300.00 for non-profits donations, successfully building "new Ohana" across the healthcare finance community.

Submission Category:

- Mission Impact

Submission Type:

- Multi-Chapter

If this is a multi-chapter or multi-region submission, please add the other chapter(s) or region(s).:

Hawaii Chapter

Needs Identification

The Hawaii and Oregon chapters identified a critical gap in regional programming that addresses leadership equity beyond standard technical healthcare finance topics.

Process: The chapters recognized a need for programming focused on women's advancement and actionable allyship strategies.

Target: The initiative was designed to impact both chapter membership and regional event quality by providing a unified platform for professional development.

Significance: By merging resources, the chapters addressed the professional isolation of members through a joint virtual environment, providing high-value content that individual chapters might not have funded independently.

Goals and Objectives

The goals were designed to be both challenging and measurable, relating directly to identified member needs:

Objective 1: Showcase real-world leadership journeys of high-impact women in healthcare and related fields.

Objective 2: Provide actionable strategies for fostering allyship and advancing gender equity in leadership roles.

Objective 3: Increase engagement and membership in HFMA chapters through inspiring, high-quality joint programming.

Target Audience: Emerging leaders, seasoned executives, and committed allies across both the Pacific and Pacific Northwest regions.

Methodology

The methodology focused on professional delivery and collaborative resource management:

Execution: A half-day virtual conference held on October 16, 2025.

Collaborative Management: Leveraged joint committee leads from both Hawaii (Tammy Dumlao) and Oregon (Evan Martin).

Budgeting: Registration was set at $50.00 per person, with profits from non-chapter members split 50/50 between the chapters.

Sponsorship: Secured industry support from Boolient, Enable Comp, IRRG, and Professional Credit to offset costs and enhance visibility.

Evaluation and Results

Performance was measured through a post-event electronic survey collecting quantitative ratings and qualitative feedback.

Overall Event Performance Metrics

- Overall Event Rating (Average): 4.67 / 5.00

- Would Recommend to Others: 100% Yes
- Time Allotment Satisfaction: 100% Satisfied/Very Satisfied

Speaker Content & Delivery Ratings

- Session 1: Martie Moore — 66% Very Satisfied / 34% Satisfied
- Session 2: Anne E. Lopez — 83% Very Satisfied / 17% Satisfied
- Session 3: Hamilton & Hernandez — 66% Very Satisfied / 17% Satisfied
- Session 4: Libby Wagner — 66% Very Satisfied / 17% Satisfied

Impact on Members (Qualitative Feedback)

- **Leadership Insights:** "The leadership examples were applicable."
- **Session Impact:** "Building diverse alliances... was particularly valuable."
- **Collaboration:** "I loved that the two chapters had a chance to network!"
- **Overall Quality:** "Amazing job! All of the speakers were EXCELLENT."

Continuous Improvement: Future Roadmap

Based on the specific feedback collected in the post-conference survey, the Hawaii and Oregon chapters have identified the following actionable improvements for future joint sessions:

- **Optimizing Remote Engagement:** While attendees "LOVED the energy" brought by chapter leaders, the committee is exploring more interactive breakout sessions to further address the challenges of remote engagement.
- **Time Zone Alignment:** Future planning will evaluate shifting the schedule to an earlier start time (e.g., morning for Hawaii and afternoon for Oregon) to better accommodate the geographical spread of the joint audience.
- **Expanding the Collaborative Model:** Given the success of the networking component, there is a clear mandate for "more collaborations" between these two chapters to sustain the momentum of the "Women and Allies" movement.

Financial Category Details / Calculation

- **Total Registration Revenue (Total attendees × $50.00 fee):** $2,900.00
- **Sponsorship Revenue (Boolient, Enable Comp, IRRG, Professional Credit):** $2,000.00
- **Gross Revenue (Registration + Sponsorships):** $4,900.00
- **Event Expenses (Keynote speakers, platform fees, marketing materials):** $1,641.31
- **Net Profit (Gross Revenue - Expenses):** $3,258.59

Throughout the virtual conference, donations were encouraged to support nonprofit organizations doing impactful work in their communities. The Hawaii and Oregon chapter presidents selected one nonprofit organization from each chapter.

- Hawaii selected the Women's Fund of Hawaii
- Oregon selected the Q Center

The **Women's Fund of Hawaii** supports innovative, grassroots programs that empower women and girls statewide. The Fund provides information and education on women's and girls' philanthropy, highlights women's and girls' issues, and increases visibility of grantees.

The **Q Center** celebrates the 2SLGBTQIA+ community by building equitable structures to foster intersectional safety, joy, mutual aid, and holistic wealth throughout the state of Oregon.

Together, attendees contributed donations totaling **$300**, split equally between the Women's Fund of Hawaii and the Q Center.

Chapter Excellence

Submission Title:

Sponsor Showcase: Redefining Sponsor Engagement Through Strategic Connection

Submission Summary:

The MA-RI HFMA Chapter redefined sponsor engagement through an innovative Sponsor Showcase that created structured provider-partner conversations, elevated sponsor value, increased chapter revenue, and established a scalable, repeatable model for operational excellence.

Submission Category:

- Chapter Excellence

Submission Type:

- Chapter

Below is your full text with **only formatting cleaned and “attach” references removed where indicated**, while keeping **all original wording, structure, and content intact**:

Needs Identification :

For the Massachusetts – Rhode Island Chapter, our Sponsorship program is the single biggest contributor to the financial success of the chapter. During the 2025 chapter year, our Sponsorship program created $110,605, a total of 25.17% of the annual revenue received by the chapter. That sounds impressive, but a deeper dive into the finances revealed that was the lowest percentage of annual revenue that Sponsorship had contributed in the previous six years. What’s more, the average fee received per Sponsor was also at the lowest level of the previous six years.

Certain ebbs and flows within Sponsorship numbers are natural. New Sponsors enroll, while others take a year or two away. Some Sponsors may move up to higher Sponsorship tiers and others may drop down a level. Accordingly, a degree of fluctuation with respect to the number of Sponsors, their chosen level of support, and the total revenue generated from the program is to be expected. But our Chapter Leadership thought this warranted a deeper look.

We asked ourselves two questions:
1.)What constitutes a successful Sponsorship program for our chapter?
2.)What constitutes a successful Sponsorship program for our Sponsors?

The answers to the first question were fairly straightforward. The most obvious answer was financial success. The very reason the Sponsorship program was created in the first place was to support the chapter financially. But our Sponsors also contribute to the chapter in numerous other ways. They speak at in-person educational events and webinars; they write articles for our chapter blog; they volunteer on various committees; they host networking events; and they make up the majority of attendees at virtually all of our events. A successful Sponsorship program is not only profitable, but helps set the engaging tone for all our chapter does.

The answers to the second question were a little less straightforward. Many Sponsors indicated that they felt fortunate to have the opportunity to participate with the chapter and that they were truly appreciative of the recognition they receive. But feedback from other Chapter Sponsors, especially from some organizations that had supported the chapter for years, was eye opening. Conversations with existing Sponsors revealed a disconnect between what we were offering for benefits and what many really needed. Our chapter continued to add perks like the ability to have a white paper shared with our Chapter Members, the option to introduce a speaker at one of our well-attended conferences, or the opportunity to have a logo placed in a strategic area on our social media accounts. But our business partners noted that what they really wanted more than anything else was to get just a few minutes to speak in person to Provider decision makers without feeling like they were bothering them. And they generally weren't getting that.

We also realized that there was a third question that we hadn't been asking often enough: what constitutes a successful Sponsorship program for our Provider Members? A former Chapter Board Member remarked to one of our Sponsorship Chairs, "I know who most of our Sponsors are, but I wish there was a way to learn what they each actually do." She clarified that when she attends our Annual Revenue Cycle Conference, if she spends two minutes at each exhibit table, that amounts to an hour and a half of time spent without learning very much about their operations. She wanted to know what all of these organizations offered, she just didn't have the time or the platform to do so.

In short, we had a group of business partners who were looking to just have real business conversations with Providers and our Provider Members wanted the exact same thing! We took that as a call to action and began to discuss ideas for an addition to our Sponsorship program that:

1.)Facilitated short, meaningful meetings between Sponsors and Providers.
2.)Felt more fun and exclusive than a "regular" networking event.
3.)Didn't create an unnecessary burden on our Sponsorship Committee.
4.)Had the net effect of encouraging business partners to become Chapter Sponsors.
5.)Met chapter budgetary requirements.

We ultimately decided to host our inaugural Sponsor Showcase. And the response has been overwhelming.

Goals and Objectives :

The goals for the Sponsor Showcase came together fairly quickly, which was a good sign that our Board and event planners were all on the same page. We agreed that the focus on facilitating real business discussions between Providers and Sponsors was the single most important goal for the event, but that true success would lie in achieving all four goals with the same event.

Goal 1: Create an event that brings Providers and business partners together for real business discussions focused on the problems facing the Providers and the solutions offered by the business partner Sponsors.
Goal 2: Create an event that feels special for both Chapter Sponsors and Provider Members.
Goal 3: Create a road map for future events.
Goal 4: Create an event that is as affordable as possible for the chapter.

Methodology:

Our process for creating this event was similar to hosting many of the in-person educational events our chapter hosts every year.

Step One - Set a Budget:
Our chapter is fortunate to be in a strong financial position. Our Board discussed the

importance of this event and decided that a net expense/loss of approximately $10,000 would be a worthwhile investment in the chapter. We agreed that the money invested here would generate goodwill with our existing Sponsors, give us valuable data points for designing our Annual Sponsorship Program in the future, and ideally build momentum towards future Sponsor Showcase events.

Step Two - Find a Location:
In evaluating possible locations for this event, we identified four key characteristics that we wanted our chosen location to fit:
*Upscale feel
*Central location
*Fairly flexible
*Fits within budget

These seemed to be fairly straightforward requirements, but proved to be more challenging than we originally anticipated. We began by evaluating venues that were equidistant to both Boston and Providence, the two largest cities in our chapter geographic area. Although these venues were centrally located, we were mostly looking at hotel facilities that didn't have anything unique about them. Our evaluations of these centrally-located, but somewhat uninspiring venues kept leading to the decision to just keep looking. Through continued discussion, we realized that the upscale feel of the venue was more important to our plan than we had originally thought. As a result, we shifted focus to trying to find a unique venue that would still be a reasonably close distance from our population centers.

We finally discovered The Harvard Club on the recommendation of one of our Board Members, Emily Anne Jacobstein, who is a Member of the Club. The venue proved to be a great fit. It is in a historic building, with the club having been at the current location since 1913. It is not a hotel or traditional conference venue, so it felt different than most educational and networking events we host. We took a tour and were able to observe the excellent staff and the "special" feel to the venue. Their event coordinator gave us several room options and explained that she would be able to tentatively hold multiple spaces for us while we navigated the invitation confirmation process. The combination of all those factors made it a very logical choice.

Step Three – Identify the Right Attendees:
With the location chosen, the next step was to determine the invite list. We knew we had to invite enough people to make the event happen, but we wanted to be cautious about inviting too many people. We decided that we wanted three groups of people to be there:

1.)Annual Sponsors – After considering multiple models, we decided to make this available to Sponsors who backed the chapter at the Gold level or above. This accomplished three things. First, it limited the number of attendees, which made the event size manageable and helped contribute to the intimate feel of the gathering. Second, it served as an incentive for organizations to support the chapter at a premium without requiring that they Sponsor at only the highest level. Third, it ensured that we were able to recruit enough Providers to make the evening worthwhile for all of the Sponsors who chose to participate.

2.)Providers: Our planning team had a lively discussion over who the "right" Provider representatives were. We knew that being able to tout the attendance of CFOs would sound great to all of the Sponsors who would be in attendance, but we also discussed how frequently vendor partnership ideas are brought forward by the CFO's direct reports and other team Members. We determined that the best balance would be to recruit CFO's as well as VPs or Directors in various finance areas with influence over vendor partnership decisions.

3.)A very limited number of volunteers – We knew that if the room was too crowded, it would lose the exclusive feel and would become more like a general networking event. We decided to only include a total of two volunteers – our Chapter President, Dhara Satija and our Sponsorship Chair, Lisa Wynne.

Step Four – Outreach to Providers:
Our discussion of Provider representatives naturally evolved into a discussion of how to attract them to the event. We knew that they wanted to learn about the product and service offerings of our annual Sponsors, but we were looking for a way to add another benefit that would make this an event they wouldn't dare miss. We eventually decided to offer all Provider attendees a free, fully transferrable pass to every educational event we host for the remainder of the chapter year. The value of that pass was approximately $900 and would enable a CFO to send their Compliance Officer to our annual Internal Audit and Compliance Conference, their VP of Revenue Cycle to our annual Revenue Cycle Conference, and so on.

The idea of the transferrable pass represented a true win-win for the chapter. Active involvement of key stakeholders from area healthcare Providers drives increased Member engagement at all levels of our chapter and the marginal cost of each additional attendee at our in-person events is negligible. We were confident that between the value of the discussions with business partners and the additional yearlong educational benefit, we were on the right track in attracting attendees.

We also knew from the experience of our Board Members and from discussion with other chapters that have hosted multiple CFO panel-type events that we were unlikely to secure significant participation from high-level Providers by simply sending out e-mail blasts. We also knew it was rare for a CFO to put their hand up and request an invitation to participate. This meant that direct outreach would be the best avenue for us.

We began our outreach to Providers by examining our Member roster to identify the people we wanted to invite and then determining which Chapter Leader (Officer, Board Member, or Committee Chair/Lead) would be the most appropriate to reach out with the invitation. We then crafted a template that could be customized easily and sent without too much work on the part of the sender.

We knew it would likely require some favors to get the ball rolling, which was why we leaned heavily on the networks of the Providers on our Board of Directors. We hit a home run when one Board Member was able to recruit the CFO of her current employer, the VP of Revenue Cycle from another health system, and the Chief Managed Care Officer from her previous employer in addition to her participating in her role as Chief Revenue Officer. Off the strength of these early commitments, we were able to get other leaders to participate and then shift our focus to planning the event logistics.

Outreach to Sponsors was similar, but simpler. We knew this event, as a free benefit to our annual Gold Sponsors and above would be well attended. So we created a formal invitation for Sponsors that outlined the event and what we were planning and distributed it to the contacts from each organization. In our communications to Sponsors, we also provided them with an updated tentative list of Provider attendees and asked that they communicate any requested meetings to us so that we may make the meetings as productive for them as possible. Response to this outreach was very positive.

Finally, we created an Outlook invite for all people who had responded positively to our initial outreach. We wanted to eliminate any possibility that people might initially commit to attending the event and then forget about it. With it in their calendars, they not only had a built-in reminder of the Sponsor Showcase, but we had an easy way to contact them and update the event schedule if needed.

Step Five – Planning Event Logistics:
While we continued to recruit participants, we expanded our discussion of exactly how the evening would flow, with a focus on the speed networking portion of the event. We thought that five-minute meetings would be too short of a window to really discuss a given facility's needs and the business partner's ability to address those needs. We also felt that ten-

minute meetings would be too long to allow for as many individual interactions as we wanted.

Based on that thought process, we settled on a meeting length of seven minutes. We were in agreement that should be long enough to get well past initial introductions, but short enough to send the message that this was a first meeting, not a place for a full sales presentation.

We then discussed how many meeting sessions to hold. We had the room reserved for three hours, but knew that there would be a limit to how many meetings a given Provider could sit through before they stopped benefitting from additional interactions. We agreed that about an hour of meetings would be enough, so we capped the number of meetings each Provider would have at nine in total.

Factoring in two minutes for transition from one table to the next, we were looking at eighty-one minutes being needed for the speed networking session of the evening. Including brief introductions and instructions, we believed that ninety minutes of the night would be filled with speed networking, with the room being available for another 90 minutes to use as we saw fit.

We ultimately decided on the following schedule:
5:00 PM: Arrival and open networking (with cocktails and hors d'oeuvres being served.)
5:45 PM – 7:15 PM: Speed networking
7:15 PM – 8:00 PM: Open networking and cocktail making class

Our logic with that schedule was that it allowed for people to arrive a little late without missing the most important part of the evening. It also allowed us flexibility; if everyone arrived by 5:05 PM, we knew we could start a little early and if attendees were running very late, we could hold off on starting the speed networking without it causing a disaster. This scheduling was a very easy decision, but became one of the most important calculations we made.

Finally, to help make up for the intentionally limited nature of these conversations, we also decided to create a book of Sponsor summaries that would be distributed exclusively to Providers. We explained to participating Sponsors that this was our attempt to give Providers a true summary of all the problems that our Sponsors' organizations addressed. We asked them to provide a one-page summary of their company, and encouraged them to include real-world differentiators to help the Providers navigate discussion with them. This allowed Sponsors the opportunity to provide a significant amount of information about their company while providing health system leaders with a reference document for future use.

Step Six - Promotion:
Because this event was designed to be fairly exclusive, we relied heavily on direct e-mails, phone calls, and texts to reach the correct audience. But we also felt it was important to promote the Sponsor Showcase in similar fashion to our other chapter events to show our Membership that this event was an important part of our chapter year.
We created graphics for our web site and for our chapter LinkedIn page. By posting these graphics, we were certain to get as many eyeballs as possible on the event, which would maximize interest in attending. The fact that it was listed as “by invitation only” further contributed to the exclusive feel of the event.

Step Seven – Event Execution:
We decided to wait until the day before the event to set the meeting schedules. This turned out to be a great decision, as we unfortunately received a cancellation that day from one of our Providers who had to attend an emergency finance meeting at his hospital. We were disappointed to lose him from the roster, but we knew this was a risk and we were able to adapt the schedules. Ultimately, we were able to create schedules where every participating Sponsor was able to have seven in-person meetings and two “open” sessions. The schedules were sent out to all participants, which helped them prepare for the event, but also served as one final opportunity to conform attendees and avoid no-shows.

The day of the event, we had several Board Members arrive at the venue to help prepare. We set up a small registration table with name badges, printouts of individual schedules for each participant, and a supply of the Sponsor summaries we had collected.

There were a few minor hiccups with the event. Traffic is always bad around Boston, but on November 6, 2025, it was a nightmare. This resulted in a number of Providers arriving late, cost us two attendees (one Provider and one Sponsor) at the last minute, and forced us to hold off on starting the speed networking until 6:15 PM. Fortunately, we were able to simply extend the opening networking session and shorten the closing networking session to accommodate the change in timing. We also were able to make minor changes to meeting schedules to ensure that no Sponsors were sitting out too many rounds of meetings.

We began the event with our Chapter President, Dhara Satija, welcoming everyone and thanking our Chapter Sponsors for all the support and engagement they provide to the chapter. Our Immediate Past President, Patrick McDonough, then explained the schedule of events for the evening. We were then off and running, with energetic and collaborative sessions taking place throughout the room. We were ultimately very glad that we allowed two full minutes for transitions between sessions because people were so enthusiastic in their discussions and the 90 minutes of speed networking flew by. Dhara closed out the evening by again offering a heartfelt thank you to all who participated.

Step Eight – Follow Up:
Knowing the event was well-received, we wanted to capitalize on momentum to both solicit feedback about the event and promote continued engagement with future chapter events. We distributed a survey to all attendees shortly after Sponsor Showcase that asked questions aimed at gauging the success of the event as well as requesting suggestions for changes that should be made for future iterations of the Sponsor Showcase. Finally, we sent out e-mails to each Provider attendee to again thank them for their participation and to distribute the coupon code that would allow them to register for education events at no charge. Our survey was well received and generated significantly more feedback than our post-conference surveys typically do.

Evaluation and Results :

Our inaugural Sponsor Showcase was one of the most successful new events our chapter has created in several years. We clearly met all of our goals and recorded a few other very important successes.

Goal 1: Create an event that brings Providers and business partners together for real business discussions focused on the problems facing the Providers and the solutions offered by the business partner Sponsors

By just hosting this event, we met Goal 1. This seems like an easy statement to make, but with the number of moving parts involved with finding a location and recruiting enough participants, we didn't hesitate to celebrate this achievement.

Goal 2: Create an event that feels special for both Chapter Sponsors and Provider Members

We thought this goal would be a little difficult to measure, but the responses to our post-event survey certainly indicate that the event satisfied all attendees:

"The best part… the agenda and timeline. I enjoyed the opening time to mingle and get to know Providers and vendors in the room. The time allotted for networking, 7 minutes each, was just enough to introduce yourself and hear from the client."

"The ability to sit and have a conversation with the Provider, priceless. The beginning of building new relationships."

"I thought it was a great inaugural event! I hope the vendors felt the same way. Thank you for the invitation and opportunity to participate.."

"THANK YOU THANK YOU THANK YOU THANK YOU"

"Amazing job on the first Sponsor showcase! This is an awesome benefit for corporate Sponsors."

"It was a great event, and the value derived for free attendance at a year's worth of educational events is fantastic… I LOVED the venue"

Goal 3: Create a road map for future events

By limiting the scope of the inaugural Sponsor Showcase, observing what worked and what didn't became a fairly easy exercise. We know the "feel" of the venue conveyed exactly the message we wanted it to because several attendees came right out and told us that the event felt different from most networking events. We know that direct outreach to financial leaders was the most likely avenue to secure their participation and that following up immediately with an Outlook invite. We know that working with a flexible venue and maintaining a somewhat flexible schedule is very beneficial when things don't go completely according to plan. Between these successes and the Lessons Learned that are described below, we are confident that we have a repeatable road map for future iterations of the Sponsor Showcase.

Goal 4: Create an event that is as affordable as possible for the chapter

We had originally projected the Sponsor Showcase to be a $10,000 expense/loss for the chapter. We are happy to report that the event actually turned a profit.

First, our total cost for hosting the event finished at $8,490, which was $1,510 below budget. Additionally, as we had hoped when planning the event, the attraction to the Sponsor Showcase resulted in two new business partners choosing to become Sponsors. The Showcase also incentivized two existing Sponsors to choose to move up in Sponsorship level. All four of those organizations specifically noted that their decisions were driven wholly by the Sponsor Showcase.

The net financial gain from those four changes was a positive $9,130 to the chapter. That means we hosted an event that was budgeted to lose $10,000 and actually turned a $640 net profit.
Anecdotally, another two first-time Sponsors noted the Sponsor Showcase was a contributing factor in their decision to Sponsor at the Gold level, meaning another $6,930 was at least partially attributable to this event. If we credit the Sponsor Showcase with generating that revenue, out profit jumps to $7,570.

Regardless of how we measure the actual financials, the inaugural Sponsor Showcase clearly met our financial goals for the chapter.

Additional Success: Sustained Engagement Momentum

One of the best pieces of feedback we received was from a non-Sponsor business partner who was interested in participating, but was going to be out of town during the event and thus was unable to attend:
"This is a Sponsorship opportunity that I fully endorse and will support the next time around… this is exactly the type of initiative HFMA should be providing to Sponsors."

That business partner, along with two others, has pledged to become a Sponsor at the beginning of the next chapter year in order to take advantage of the event. Truly, one of the most rewarding parts of putting in the effort to host the Sponsor Showcase has been experiencing the pride of repeatedly fielding a similar question from multiple Sponsors: "When is the next one and how do I get involved?" Where we often have to reach out to new Sponsors to educate them about our Sponsorship program, we are now fielding inquiries from Sponsors who are looking to get and stay involved.

In addition to the praise received in our Sponsor survey and through questions like that one, our Sponsors have also put their support behind our other chapter events. We sold out our December social event. We then sold out all Sponsorship opportunities for our Revenue Cycle and Finance Conference in January on our way to increasing event attendance from 283 to 329, a 16% increase, and making a profit of approximately $50,000. It is very clear to us that the Sponsor Showcase has given us a significant bump in engagement.

Additional Success: Collaboration with Other Chapters

Word of our success has also spread to other chapters. The Metropolitan New York, Georgia, and Metropolitan Philadelphia chapters have all reached out to discuss how we hosted our event and how they could host a similar event for their respective chapters. This has been a success in which our chapter takes tremendous pride. The recognition is nice, but it is even better to be able to give back to the Association. Over the past several years, our chapter has gone to great lengths to tap into the expertise of our colleagues across the country to learn what works for them and to work in a collaborative manner to deliver the very best to our Membership. To know we may have played a small role in the success of another chapter is a tremendous source of satisfaction for our Chapter Leadership.

Additional Lessons Learned:

In addition to the aspects we want to duplicate for next year, our inaugural Sponsor Showcase also showed us a few areas to which we need to pay careful attention in planning the next event.

First, we know that flexibility in all forms is extremely important. As noted above, we had issues with traffic that forced us to change our schedule on the fly. Fortunately, our built-in schedule flexibility and service flexibility on the part of the venue made this a minor speed bump, but we know we need to maintain a focus on flexibility moving forward.

We also know we need to plan the next Sponsor Showcase as far in advance as possible. As great as is that we already have three new Sponsors waiting to register for next year, it would have been even better to get them involved this year. Similarly, some Providers who were interested in attending didn't find out about the Showcase until they already had committed to other events that evening. We believe we have solved this moving forward as we plan to make it an annual event and are already finalizing our date for the fall.

We also learned that we need to increase the amount of communication. With the avalanche of e-mails people receive on a daily basis, they are bound to miss a message or two. We reached out multiple times to ask business partners if there were any particular Provider attendees they wanted to meet with in person, yet the feedback provided in the survey results indicated multiple Sponsors missed those e-mails. We also had Providers show up at the Showcase without having seen their scheduled meetings, something that was sent the day before the event. Our solution to both of these issues will be to send additional reminders and to host two Zoom meetings prior to the event, one each for Providers and Sponsors, to go over all logistics for the event.

Conclusion:

Prior to hosting our inaugural Sponsor Showcase, we were asking ourselves the usual questions chapters ask when they are considering a new addition to their calendar – what if it costs too much? What if the location isn't great? What if we don't get great attendance?

A few months later, with improved financials, increased engagement from both Providers and Sponsors, and a lot of energy moving forward, we find ourselves looking back and asking another question: what would have happened had we NOT hosted this event? The Massachusetts – Rhode Island Chapter is very glad we didn't have to find out!

Basic Information

Submission Title:

NC and SC HFMA Joint Success Award Submission, Stronger Together: The Carolina Experience

Submission Summary:

The Carolina Symposium was created as a collaborative initiative between the North Carolina and South Carolina HFMA chapters to address rising costs, declining attendance, and member feedback by consolidating their separate conferences into one unified event.

Submission Category:

- Chapter Excellence

Submission Type:

- Multi-Region

If this is a multi-chapter or multi-region submission, please add the other chapter(s) or region(s).:

South Carolina

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Needs Identification :

The decision to launch the inaugural Carolina Symposium emerged from a data-driven assessment of the challenges facing both the North Carolina and South Carolina HFMA chapters. Rising operational costs, shifting member expectations, and declining attendance trends made it clear that the traditional, chapter-specific conference model was no longer sustainable or delivering optimal value.

Historical attendance data showed a gradual softening in SCHFMA's fall conference participation, while NCHFMA experienced increasing costs to maintain high-quality programming. Budget analyses from both chapters revealed that duplicative efforts such as separate venues, vendors, speaker contracts, and administrative processes were creating financial strain without a proportional increase in member benefits. NC HFMA 2024 Summer Meeting Expenses were $106k and resulted in $0.00 income despite 257 registrations. SC HFMA only had 119 registrations for their 2024 Fall Meeting.

Feedback from members and business partners reinforced this conclusion. Post-event surveys and ongoing conversations consistently reflected a desire for expanded networking opportunities, more diverse educational content, and more efficient use of sponsorship dollars. Several of the region's largest health systems operate across both North and South Carolina, and business partners noted that a consolidated event would enhance visibility while streamlining their investment.

Collectively, these insights pointed to a clear opportunity: a collaborative, multi-chapter symposium designed to reduce operational burden, broaden educational reach, and deliver a unified regional experience. The Carolina Symposium was intentionally created to address these gaps and provide a higher-value, more efficient, and more impactful event for both chapters.

Goals and Objectives :

The Carolina Symposium was intentionally designed with clear, measurable objectives aligned to chapter excellence. By bringing both chapters together, the goal was simple yet strategic: improve operational efficiency, elevate the member experience, and increase value for business partners through a unified regional event.

Key Objectives:

•Reduce total event costs by 20% compared to hosting two separate conferences.
•Attract 300+ attendees to the 2025 Symposium in Greenville.
•Welcome at least 15 first-time or new members to expand chapter engagement.
•Strengthen business partner participation through enhanced and expanded sponsorship opportunities.

Together, these targets reflect a focused commitment to sustainability, growth, and delivering greater impact for both chapters.

Methodology:

A disciplined, collaborative approach guided the launch of the Carolinas Symposium. A joint planning committee composed of leaders from both NCHFMA and SCHFMA was established to streamline decisions, eliminate duplication, and standardize workflows.

Key components of execution included:
•Unified committee structure with shared leadership roles
•Coordinated planning timeline
•Consolidated venue and vendor selection to reduce costs
•Unified sponsorship strategy to grow revenue and simplify partner engagement
•Coordinated cross-chapter communication plan to ensure consistent outreach across both chapters.

This structure fostered stronger collaboration, improved operational discipline, and positioned the Symposium for long-term sustainability and success.

Evaluation and Results :

The Carolina Symposium exceeded expectations, delivering strong engagement, growth, and value for both chapters.

Attendance Growth

•Combined 2024 attendance (separate events): 376
•2025 Carolina Symposium attendance: 376

Rather than splitting audiences across two events, the Symposium consolidated energy into one high-impact regional experience meeting the 300-attendee goal and preserving full engagement across both states.

Financial Performance

2025 Carolina Symposium Revenue
•Sponsorships: $147,000
•Registration: $120,176
•Total Income: $267,176

Expenses
•$185,492.50

Net Profit
•$81,683.50
•Split 50/50 between NC and SC chapters

Why This Matters

Compare that to 2024:
•NC 2024 expenses alone: $106,098.89
•NC 2024 sponsorship revenue: $9,650

The collaborative model transformed financial performance:
•From limited sponsorship participation
•To $147,000 in sponsorship revenue
•From rising independent expenses
•To a shared-cost structure producing $81,683.50 in profit

The Symposium did not just break even; it created margin, stability, and reinvestment opportunity for both chapters.

INNOVATION

The Carolina Symposium redefines collaboration within HFMA. By combining two historically separate conferences in separate regions into a single, rotating, multi-day event, the chapters created a dynamic platform that delivers exceptional education, meaningful networking, and unmatched value.

Innovative Elements
•Every session led by healthcare providers
•New CPE opportunities for SC attendees
•Interactive networking experiences
•Shared registration and communication infrastructure to streamline operations
•Rotating host model to ensure equity and sustainability

This model sets a new standard for the Carolinas and offers a scalable blueprint for other chapters.

SOLUTION-DRIVEN IMPACT

The Symposium directly addresses the challenges in the needs assessment: rising costs, fragmented engagement, and declining attendance. By uniting the two chapters, the event delivered a practical, scalable solution that improved operational efficiency and created an unforgettable member experience.

INDUSTRY INFLUENCE

The Carolina Symposium is more than a conference; it's a model for HFMA. By pooling resources and thinking regionally, the chapters demonstrated how to expand reach, elevate value, and deliver an experience that resonates beyond state lines.

Submission Title:

Fall Leadership Meeting Best Practices to Drive Outcomes

Submission Summary:

This abstract outlines Region 10's efforts to plan, execute, monitor, and continually improve chapter operations in Region 10 using polling, task trackers, group facilitation, and other methods. It is envisioned for use as a template and model for future Regional Fall Leadership Meetings.

Submission Category:

- Chapter Excellence

Submission Type:

- Region

If this is a multi-chapter or multi-region submission, please add the other chapter(s) or region(s).:

AZ, UT, WY, MT, ID, CO, NM

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Needs Identification

This section will outline data collected and the specific needs identified to impact the attendees, event, and processes in a noteworthy and significant way.

Background

The Fall President's Meeting was transitioned to Regional oversight from HFMA HQ for FY 2025-2026. As such, HFMA regions were tasked with finding a location, venue, date, and programming to ensure a successful planning event and outcomes for the Presidents and President Elects.

Data Collection

Given that this oversight had not been historically hosted by the regions, a methodology to gain concordance with time, travel, logistics, topics, outcomes, and other needs needed to be developed. Data was gathered to ensure alignment on impactful, actionable topics, as this represented a key concern from chapter leadership.

Goals for the meeting were gathered from the chapter leadership, HQ, and REC. Needs were identified in areas including chapter operations, succession planning, SWOT, Bylaws, Enterprise engagement, HQ updates, and many others. The specific methods are outlined below in the **Methodology** section, including the specific templates, data, and processes used to facilitate the planning and execution of this meeting.

Attendee Impact

The Regional Executives (REs) also realized the Fall Leadership Meeting (FLM) was not intended to be ran or facilitated by the REs - it was to be facilitated by the presidents and president elects - it was THEIR meting - and the REs were there to guide, support, and capture the content/idea sharing. This was an "ah ha" moment for the leadership for the chapter leaders and the REs as it established accountability and ownership to the planning, discussions, and outcomes at the Chapter leadership level. For the meeting to be successful, it needed to be curated by the chapter leadership and applied directly to their members with measurable outcomes at their chapters.

Significance

This was a ground-up, grass roots effort for the region to ensure feedback was captured from chapter leadership, and there was engagement and alignment to the chapters, HQ, REs, etc. for actionable, positive outcomes.

Goals and Objectives

This section will outline the goals and objectives, relating to the identified needs above. The content here will specify the target audience and measurable performance levels desired for each goal/objective. This section will also outline how achieving goals will be challenging and, if accomplished, will add value to the chapter and its members.

Target Audience

Chapter leadership, specifically the President and President Elect. This was their meeting to collaborate and plan for the region on items specific to their chapters and membership.

Goals Identified

The Region 10 REs gathered to complete a goals assessment for for the meeting. The Region 10 REs also gathered feedback from other regions who had sample agendas or had their meeting already to build upon best practices. President and President Elects were queried, in advance, specifically to ascertain objectives and outcomes for the invested time surrounding an in-person planning meeting.

Specific goals and objectives for the 2026 Region 10 Fall Leadership Meeting (FLM) included:

- Set up leaders for their Presidential Chapter Year (be best prepared and have a good "bench" of contacts across the region to help advance chapter operations)
- Create engagement (with other presidents and HQ)
- Learn more about HQ (resources, role, contacts, etc.)
- Get ideas from other chapters (specific to mountain/rural state issues in Region 10 for member engagement, finances, programming, etc.)
- Have a positive impact on the chapter during my [Presidential] term
- Build a bulletproof succession plan
- Be prepared for role as a President or President-elect
- Align more with HQ (operations, happenings, meetings, requirements, deadlines, resources, contacts, etc.)
- Collaborate with other chapters (for planning, Region 10 webinars, bylaws, board composition, etc.)

Challenges

These goals were broad and not specific, and as such, the REs suggested topics of discussion to explore outcomes that were measurable to chapter performance. As an example, "get ideas from other chapters" needed to translate into a SWOT/TOWS exercise to understand strengths and opportunities from chapters throughout the region.

Value Add if Goals Accomplished

The chapter leaders agreed that if we discussed the topics listed from the goals, we would have a collaborative and productive meeting. There was emphasis on having measurable outcomes, and it was suggested to create an ideas and actions tracker to ensure the meeting was documented and actions had associated accountability to ensure impact to leadership and chapter members. Targets were established in the trackers that assigned priority to the tasks, expected outcomes, and ownership to ensure success for chapter operations and this meeting.

Methodology

This section will outline the methods used to address the goals and objectives, specifying who, how many, how, what, and when. It also will Include the time and resources required, members involved, deadlines, etc. Evidence of conscious efforts that are clearly related to the identified needs and to the goals and objectives are outlined here.

Methodology Steps

1. Chapter leadership (P/PE) and HFMA HQ were queried about the goals of the FLM.
2. Goals were transitioned to topics of interest.
3. Based on the goals, during one of the monthly P/PE meetings for Region 10, the chapter leadership listed suggested topics for the FLM
4. Topics are listed in Column "C" and then the chapter presidents were asked to RANK all the topics from 1 to 12 in order of "most preferred" (1) to "least preferred" (12). This was done through the aforementioned, shared excel file, and rankings are displayed for each chapter
5. The average score was then curated in Column "F", which displayed the average score for each topic. They were also heat mapped according to the number (Green = 1-6, Yellow = 6-7, Orange = 8, and Red = >9). Items in Green or Yellow were selected as topics for the FLM. This was to ensure we did not have too little or too much content, and also were aligned as a group about the topics to discuss.
6. Speakers were then assigned in Column "G". This was our "favorite" part, as the Chapter leaders who voted for the top topic (rank # 1, 2, 3), had to "defend" their topic and be the presenter at the FLM meeting. :) For example, WY Chapter chose SWOT for chapters - Tami Love voted that as her #1 topic she wanted to talk about - Tami was assigned that topic for discussion at the FLM to get the conversation going and also to distribute the content accordingly. As there were "ties" with some of the topics, the remaining were assigned by the next best ranking sop that all 8 of the highest ranking topics were chosen and equal across all the chapters and HQ
7. Items that scored more than an "8" were put in a parking lot for later discussion, along with an Other section in the tab for review at a future meeting / date..

8. A shell ppt deck was then created to ensure content presentation, discussion, and delivery was standard for the presenters.
9. Speakers were informed of the content and deck and then contributed to the deck via shared file.
10. This afforded, one(1) document to review and archive for the event for FLM for presentations. It also from the AGENDA for the event - Dates and times were assigned to the slots based on a noon start for day one and a noon departure for day 2. HQ, along with the 8 chapter led sessions, comprised the lion share of the content for the meeting.
11. An "ATTENDEE" tracking tab was also included to ensure travel aligned with speaking and transportation to/from airport, hotel, etc, to the venue were aligned. This also afforded a single booking location for the hotels so attendees could ensure they were in the vicinity of the venue. This also listed the teambuilding event logistics and timing as well. It was impactful to have all the logistics and planning documents in one (` 1) location
12. A lean six sigma approach was then used for the FLM meeting to reinforce goals, roles, topics, current state, future state, value stream planning, and documented actions. The group was educated on this format, process, etc., ensured all the topics were allotted equal time and allowed time for discussion from the group as well.

Resources

Item 6 above outlined the resources (speakers) assigned for the FLM based on their ranked vote of topics of interest. They were each assigned a topic, allotted one(1) hour on the agenda, and instructed to research, defend, present, and discuss their topic in the meeting.

Deadline

Speakers were asked to have their content back to the RE prior to the meeting in person date and be prepared to present their material at the FLM meeting. They were provided one (1) week to prepare the information. In hindsight, planning for more preparation time will be a consideration for the 2026 FLM.

Relationship to Needs

Speakers were assigned a topic that that their chapter peers ranked by importance. These represented the aggregate chapter highest needs for the region. Ranking determined the topics to be discussed at FLM, and those leaders that ranked them higher were assigned as the presenter to ensure an engaged discussion.

Evaluation and Results

This section will measure and identify the intended FLM planning impact on the chapter leadership, members, events, and operations. Below, the methods used to determine the level of impact, and the extent to which the performance levels stated in the goals and objectives were attained are outlined. The impact or the extent to which the performance levels stated in the goals and objectives were met is also highlighted.

Meeting Impact

1. Meeting was held and topics were presented according to the agenda.

2. Time was kept by a role and the agenda was updated to reflect topics covered, time allotted, etc.

3. Parking lot, actions, and other notes were captured on butcher paper in the room so the participants could interact and add comments without disrupting the flow of the conversation.

4. A TOWS exercise was elected instead of a SWOT whereas actions were leveraged to pivot the weaknesses and threats into outcomes .

Methods to Determine Level of Impact

5. 41 NEW actions were identified for the chapters, REs, and HQ , ranked by priority (1, 2, 3), and assigned as a result of this process and template. The group established goals, which were to have the priority 1 items COMPLETE by HFMA Summit, then the 2s and 3s STARTED / COMPLETE prior to the next FY of HFMA. These were also color coded and a filter was placed so the chapters and leadership could sort, select and filter from the spreadsheet - based on priority, owner, item, etc. Any items not complete would be assigned to the next President or RE, and will be reviewed at the next FLM.

6. Items placed in the parking lot, or ideas for the next FLM, HQ, etc. were placed into an "ideas" category. These were NOT specific, actionable items, but the group wanted them captured for their chapters and the future leaders. These items will set the foundation for the next FLM meeting and will represent the voting and topic "pool" as well as any others that get presented for the next planning cycle. There were 32 "ideas" presented and they can be found in the Ideas tab.

7. There were 20 priority one items "P1" ,14 "P2", 7 "P3" items. To date, 16 of the 41 ACTIONS are COMPLETE (40%) . 11 of the 20 (55%) of the P1s are COMPLETE, and 5 of the 14 (36%) P2s are COMPLETE. 0/7 of the P3s are complete

This standardized process effectively impacted specific chapter issues, needs, and challenges. It focused on the practical application of solutions and outlined the tangible benefits achieved. The group appreciated the originality and creativity of the project and how this process introduced new ideas, methods and activities that significantly improved chapter processes, solved problems, and met the chapter needs in a very unique way.

Alignment / Feedback on FLM

- "I thought the meeting was excellent and you did a fantastic job facilitating."
- "I heard your meeting went really well so kudos to you on that."
- "Nice job JW and Region 10!!!!"
- "Thanks for all the hard work and what a GREAT meeting."
- "I love this format and we are well positioned for next year!"

(Many other positive responses)

Things We Could Have (or Could Do Better)

1. The tracker should be on TEAMS versus a shared file - maintenance is difficult and also not aware as much as we would like..
2. Setting deadlines on each item - I feel we would make more progress if we had a goal date on each items (versus just priority 1 by Summit)
3. Creation of this template and the deck was a bit of a lift. It may prove hard for some regions, but it is well worth the outcome and we are hopeful it is standard enough to be transferable. Advance planning (months in advance) would be beneficial.
4. Accountability as leadership changes may prove hard here - we need to OWN this to make it work. It will get better with each iteration as well.

Tracking of items as complete and from HQ are mostly in email or files - TEAMS may serve a a better vessel here.