



hfma

healthcare financial management association

**New Hampshire/Vermont Chapter of the
Healthcare Financial Management Association**

**Annual Report
2000-2001**

I. Executive Summary

It is my pleasure to share with you the 2000-2001 Annual Report for the New Hampshire/Vermont HFMA Chapter. This report highlights the initiatives and achievements the chapter undertook during the past chapter year.

The activities for the past year were developed and planned through the chapter's strategic planning process. During the spring and summer of 2000, the officers, directors, and committee chairs worked together to develop the goals and objectives for the 2000-2001 chapter year. I am pleased to say that we accomplished many of the goals.

During the 2000 - 2001 chapter year we were able to increase our member count from 307 on 5/1/00 to 346 as of 4/30/01, an increase of 12.7% and the second largest percent growth in National HFMA. This occurred despite a national trend of decreasing membership in professional associations.

One of the primary goals of the chapter is providing high quality education programs for the membership. As a chapter, we continue to be very successful in this arena. The chapter offered 14 education programs with an average attendance of 90; an improvement over the prior years' averages attendance of 82. The NH/VT Chapter collaborated with the other Chapters in Region 1 to bring the Boston Cluster back into existence. This effort was so successful that the Chapters are working to bring back the annual Region 1 group meeting.

These are just a few of the highlights of the past chapter year. I am confident that the new initiatives that were launched this past year, as well as the many activities and programs that we maintained and carried forward from previous years, will continue and flourish under the guidance and influence of the new chapter leadership during the 2001 - 2002 chapter year. I am proud of our accomplishments during the past year and have been privileged to have the opportunity to serve as president of this chapter. I look forward to continuing to support the chapter in my new role of past president.

Sincerely,

Rebecca B. Bruce, FHFMA
President
New Hampshire/Vermont Chapter
2000-2001

II. Services to Members

A. Educational Programs and Events

The Education Committee, led by Erica Clermont McNamara, President-Elect, developed the 2000-2001 program calendar. The Calendar was published in the membership directory, in the chapter newsletter, on the chapter web site and a reminder postcard was sent to the membership at mid-year.

The programs were planned in direct response to the needs identified by members in the annual chapter membership survey conducted in February 2000 by Marie McGee, Secretary. While programs are planned up to a year in advance, the Chapter deliberately retained flexibility in programming to allow us to insert programs to meet the immediate needs of the Chapter.

This year we scheduled a HIPAA Privacy Regulation program in March 2001 in collaboration with six other professional organizations that drew more than 160 attendees. We are planning a follow-up program in August 2001 that is also outside of the regularly scheduled program calendar.

Educational Programs were held in different locations throughout our chapter service area in an effort to make them more accessible to our members. Most of the educational programs were held in W. Lebanon, NH, the geographic midpoint of the bi-state chapter. In order to bring educational programs closer to the membership, programs were also held in Randolph and Berlin, Vermont; and in Manchester and Portsmouth, New Hampshire.

In direct response to the membership's desire to have National HFMA programs presented locally, the NH/VT Chapter partnered with National HFMA on May 20-21,

2001, to present the national HFMA program Fundamentals of Healthcare Financial Management. This program was attended by 63 members and non-members, including attendees from HFMA members in the Massachusetts, Maine, and Maryland chapters. The program received such high approval ratings that we are planning to bring back another National program next year.

The NH/VT Chapter collaborated with the other four chapters in Region 1 to bring a National Cluster program to Boston in March 2001. The program was very successful with 135 attendees representing all of the Region 1 chapters and 48 other National chapters. One highlight of the meeting was a Past President's luncheon that was attended by 30 past-presidents from Region 1. Richard Clark, FHFMA, President of FHMA, was the keynote speaker at this popular event.

The chapter had a successful Annual Meeting and annual awards program with 91 program attendees, up from 51 in the prior year. Connie Cape, FHFMA, National HFMA Chairman, was the keynote speaker and participated in the annual awards program. Jeffrey D. Walla, CPA, FHFMA, current CLR, joined us as did many of the chapter Past Presidents and two of the three recipients of the Christopher F. Weinheimer scholarship award.

The Awards ceremony recognized twelve members receiving Founders Awards, the most recipients in any single year in the Chapter's history. There were 6 recipients of the Follmer Bronze Merit Award, 1 Reeves Silver Merit Award recipient, and 5 recipients of the Muncie Gold Merit Award. Six members who authored the three winning submissions for the 2000 Helen M. Yerger Special Recognition Awards were presented their awards. Bruce P. King, Past President, was recognized and holds the 2000 Silver Award for Excellence in Education, the Silver Award for Certification, and the Bronze

Award for Membership Growth. Four Chapter members were recognized for their volunteer work with National HFMA: Jeffrey D. Walla, FHFMA, nominated to the National Board of Directors for 2001-2004; Jeffrey Shutak, CHFP, member of the Patient Financial Services Advisory Forum 1998-2001; Bruce P. King, member of the National Advisory Council 2000-2001; and Rebecca B. Bruce, FHFMA, member of the Managed Care Advisory Forum 2001-2004.

As part of the chapter's ongoing commitment to meeting the needs of our diverse membership, the following programs were offered in 2000-2001:

- ?? September 28, 2000: Regulatory and Legislative Update
- ?? October 5-6, 2000: Claims Processing Workshop (two-track program)
- ?? October 12, 2000: Impact of Civil Union Legislation on Healthcare Providers
- ?? October 26, 2000: The Essentials of Project Management
- ?? November 17, 2000: Overcoming Claims Denial
- ?? January 17, 2001: Models for Managing Physician Compensation and Productivity
- ?? February 8, 2001: Annual Meeting; BBRA and Provider Based Status
- ?? March 7, 2001: APC Changes for 2001
- ?? March 16, 2001: HIPAA Privacy Regulations
- ?? April 12, 2001: Employment Practices Liability
- ?? April 12, 2001: Rehab PPS Implementation
- ?? April 26, 2001: Legal Implications of PHO and IDS Development
- ?? May 20-21, 2001: Fundamentals of Healthcare Finance (National Program)

In addition to partnering with National HFMA to bring a national program locally, the NH/VT chapter also partnered with National HFMA by promoting and supporting the CFO Exchanges, and the upcoming Annual National Institute (ANI) to held in San Antonio, TX at the end of June 2001.

In summary, fourteen (14) programs were provided or co-sponsored on a variety of topics. The preliminary NH/VT Chapter year-end report shows that more than 5,440 hours of education were delivered to at least 995 attendees. The chapter's continued commitment to high quality, affordable, and accessible education for chapter members resulted in a high level of attendance by both members and non-members.

This high level of attendance was recognized by National HFMA with the Charles F. Mehler Gold Award for Excellent in Education

B. Publications

The NH/VT Chapter produces two primary publications, the Membership Directory, and a newsletter, *Mountain Views*. The Chapter also maintains a web site, www.nhvt-hfma.org, that contains a current roster of officers and board members, the program calendar, a job registry, and past issues of *Mountain Views*.

The Membership Directory was published under the direction of Erica McNamara, President-elect, with support services provided by Berry, Dunn, McNeil and Parker. This is a very popular service for the membership, and next year we are considering publishing a mid-year update to the Directory.

The chapter newsletter, *Mountain Views*, was published under the leadership of Kathy Peterson as the Editor. In 2000-2001, Kathy and the newsletter committee

continued the direction and high quality with improvements to the look, content, and focus on a specific topic for each newsletter. Five editions of the newsletter were published for the 2000-2001 chapter year.

The March/April 2001 edition of *Mountain Views* was published not just for Chapter members, but was also distributed to everyone who attended an educational program in the past year. The issue highlighted membership benefits and volunteer opportunities, and was very well received.

A special thanks goes to the newsletter committee for their hard work. Part of the formula for the newsletter committee's success has been the diversity of the committee. The Chapter is fortunate to have representatives from hospitals, health plans, a collection agency, and a medical software company. The committee includes Linda Blaisdell, Linda Ducharme, Dave Ellis, Theresa Koehler, Barbara Lynch, and Diana Whitney.

The NH/VT Chapter web site was established during the summer of 1998 under the direction of Jeff Walla, past-President. The web site is intended as a key communication medium for the chapter. The Chapter will be reviewing the structure of the web site as National completes their planned web site services.

Finally, there is an on-going effort to collect members' e-mail addresses in a database and to include them in the membership directory in an effort to enhance and facilitate communications with members.

C. Services

The Christopher F. Weinheimer Scholarship program continued during 2000-2001. For the seventh year, three \$1,000 scholarships were awarded; two for University of New Hampshire students and one for a University of Vermont student. Recipients of the scholarships are selected by the health care faculty at each of the institutions based on criteria provided to them.

A recent enhancement to the scholarship program allows for two new scholarships of \$1,000 per year for up to four years for an immediate family member of an HFMA member. The recipient must be attending an accredited college or university and be majoring in a finance-related field. The first of these scholarship awards was awarded for the 2000-2001 academic year.

Last year the chapter added a pre-paid discounted educational coupon book. This allows for the purchase of 10 registrations at the member rate, saving up to \$150 over the non-member registration cost. This year, as a service to new members, one coupon was forwarded to each new Chapter member with their welcoming letter from the President.

As a service to our voluntary leadership, the chapter sought the issuance of credit cards for our HFMA related business use. The cards are restricted to use by the Officers, and the Treasurer has established policies to monitor appropriate use.

III. Strategic Quality Management

The goals and objectives for the 2000-2001 chapter year were developed by the officers, directors, and committee chairs. The first Chapter Strategic Plan was published in the 1997-1998 Chapter Year. The current strategic plan updated the prior years' three-year plans, incorporating the results of the membership survey completed in February 2001, the Chapter Self-Assessment completed in May 2001, and the Goals & Objectives developed in June 2000.

In previous years Goals and Objectives were outlined in four categories: chapter infrastructure, chapter leadership, membership, and education. This year we brainstormed on the Goals & Objectives without trying to fit them into specific categories, and then assigned the Goals to various committees or board members in order to develop strategy.

The Goals and Objectives have been published every year in the Strategic Plan. This year, as a new incentive to become more accountable for Goals and Objectives, board members and committee chairs identified one personal goal that they would shepherd over the year and these personal goals were published in the Membership Directory.

IV. Growth

Despite national trends of declining membership and attendance at education programs, our chapter succeeded in improving upon the high level of membership and educational attendance achieved during the past several chapter years. The NH/VT Chapter increased membership by more than 12% this year, and increased average attendance at educational programs by more than 10%.

The increase in membership is due in large part to the individual efforts of Lynn Guillette, chair of the chapter membership committee, and to the individual efforts of Chapter Board Members who encouraged their peers to join HFMA if they were enjoying the educational programs.

An excellent incentive was provided by the discounted registration fee for the National HFMA Program: Fundamentals of Healthcare Finance, which was produced in May 2001. The discount was just enough to cover the cost of becoming an HFMA member, and about a dozen registrants decided to become members.

Next year the Chapter will need to focus on member services and retention to keep these excellent new members.

Other indications of the growth and success of the chapter include:

- ?? Increased Corporate Sponsorship contributions from \$15,700 in 1999 to 17,800 in 2000 to more than \$21,500 in 2001.
- ?? A dramatic increase in the Chapter net assets from \$52,084 in 1999 to \$76,965 in 2000 to \$88,870 in 2001 (unaudited).

And last, but not least, the NH/VT Chapter demonstrated the success of the past year with the following Awards from National HFMA:

✍️ HFMA National Awards of Excellence:

- ? ? Charles F. Mehler Gold Award for Excellent in Education
- ? ? Henry Hottum Award for Education Performance Improvement
- ? ? Gold Award of Excellence for Certification
- ? ? Gold Award for Excellence for Membership Growth

✍️ HFMA Yerger Awards of Achievement:

- ? ? HIPAA Program Collaboration Between Six Professional Organizations; Kasey Davila; Collaboration
- ? ? Impact of Civil Union Legislation on Healthcare Providers and Delivery Systems; Becky Bruce; Education
- ? ? The Essentials of Project Management; Mary Kay Boudewyns; Education
- ? ? Corporate Sponsorship Program Enhancement; Mark Beliveau; Improvement
- ? ? Educational Coupon Program; Bruce King; Innovation
- ? ? Membership Growth in the Face of Declining National Trends; Lynn Guillette; Membership Recruitment & Retention
- ? ? Region 1 Education Cluster/Partnering with National HFMA and Associated Regional Events; Jeffrey Walla, Region 1 CLR for the Multi-Chapter Award (Connecticut, Maine, Massachusetts, New Hampshire-Vermont, Rhode Island); Innovation