

Show-Me Update

Greater Missouri Chapter

Healthcare Financial Management Association

Summer 2004

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Letter from the editor

This issue includes a letter from our new president, Greg Johnson, and the strategic plan for our chapter. Please review this plan, as it addresses the current status of the chapter, its strengths and weaknesses, and the goals for the new year. This issue also includes a new list of officers and board members and an updated list of sponsors.

The articles include one from Tim Wright, who contributes to many healthcare financial publications, and an article from Matt Levsen, our past president, on meeting continuing education requirements (CPE). As always, I welcome any submission of articles for future issues or any ideas for articles.

For the new year, I want to add more to the newsletter. This issue includes photographs. If you get digital pictures at meetings that you wish to forward to me, I will include what I can in future issues. Please include a complete description of the photo and its context. My email address is kmitchell@rss.net.

Thanks for your participation as a member of the Show-Me Chapter. I'll see you at the next meeting!

Leading with Vision: The Importance of Your Vision Statement

By: Tim Wright

True leaders have vision. I do not mean the leaders' optical ability to see the noses in front of their faces. I mean the foresight and the drive to see what the organization can achieve for the good of its customers, its employers, and its stockholders.

Without a defined vision, a hospital would not require leaders at its head. Such a hospital could survive well with capable managers overseeing daily operations. With vision for the future, however, a leader sets the course, inspires members of the team, acquires and allocates resources, and maintains direction toward vision fulfillment.

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The SHOW ME of MISSOURI CHAPTER of HFMA PROGRAMS USING TO MEET CONTINUING PROFESSIONAL EDUCATION REQUIREMENTS

By: Matthew Levsen

The Show Me of Missouri Chapter of HFMA educational programs MAY qualify for continuing professional education (CPE) requirements for you to maintain your ongoing CPA designation. The Chapter does not maintain the information required by the State Board of Accountancy for CPE; however, you as an individual may maintain the necessary supporting data. We recommend that you contact your respective State Board of Accountancy to obtain their guidelines. Basic information from the Missouri Board on the necessary requirements for you to maintain include the following:

- An outline or agenda of the program indicating the program subject matter, instructor(s), and the dates and length of program.
- A computation of the number of CPE hours. The program must be at least one hour in duration. The Missouri Board considers 50 minutes of contact time to be equal to one hour exclusive of any breaks.
- The instructor(s) must be qualified which means that they have the background, training, education or experience to lead the discussion on the particular subject. Our Chapter in developing programs considers this requirement in selecting speakers.
- A record of registration or attendance is maintained. If you keep a copy of our program announcement, this should be sufficient as opposed to needing a certificate of attendance.

For more details we ask that you contact your State's Board of Accountancy. *Thanks to the Heart of America Chapter for their input in the preparation of this article.* ■

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Leading With Vision, Cont.

A leader's vision allows the organization to share four distinct strengths.

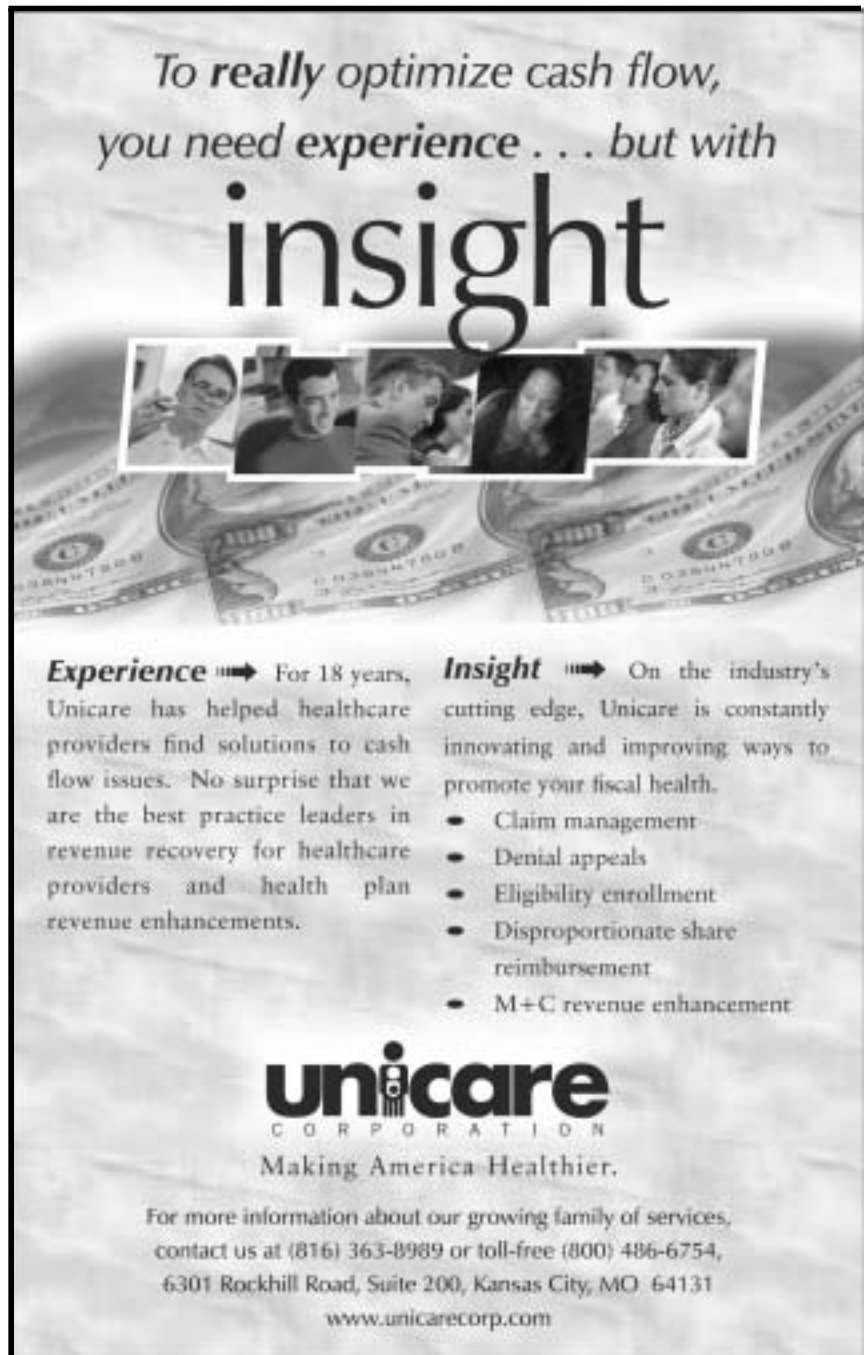
Destination. A good vision statement clarifies desired results. If you do not know where you are going, you cannot arrive there. A vision statement denotes the desired final results—final, from the current perspective. In effect, it puts the end in sight.

Direction. In laying down the destination, a vision statement encourages clarity of direction, of how to get there. Well stated, the vision enables—encourages—everyone involved to select methods to reach the destination. That, then, supports the entire team's determining and following common direction more readily.

Unity. All of the players involved—whether members of a unit, participants in a department, or employees of an entire organization—look, work, and move in a single direction thanks to a well-founded vision statement. That unity expresses complementary, focused decisions and actions.

Motivation. Destination, direction, and unity promote motivation among individuals to seek and to achieve the vision. By clearly indicating where a person, team, or entire company wants to be, how it will get there, and the ways it will work (as a whole) to journey successfully, the vision statement motivates the "let's get it done!" mindset.

A vision statement asserts where an organization, association, department, team or individual will be in the future. The future is usually three to five years out. Still, the vision statement should be worded in present tense.



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Statements of "will be" or "will have" or "will do" place the vision always ahead (and just out of reach), as the proverbial carrot in front of the donkey. To be believed as possible by all involved, your vision should be stated in the present tense.

A successfully strong vision statement blends the general and the dynamic. It ought to be broad enough to entice interest, spark attention, and motivate actions. As well, that vision statement must be dynamic enough to be believable, meaningful, and specifically valuable for all who pursue it. For a vision statement to have full potency, it must remain in the heads (memory) and hearts (inspiration) of the team members. That means express it concisely. Use active verbs. Select words that deliver punch or pizzazz and make the vision come alive.

Letter from the President

By: Greg A. Johnson



This being my first “Letter from the President” I would first and foremost like to thank each and every one of you for your past, present, and future support of this chapter. Much has been accomplished yet much is to be done. In addition, I want to thank the members of the Strategic Planning Committee for their time and efforts in developing the 2004-2005 Strategic Plan and the Board of Directors for their approval of this plan.

This should be an appropriate time to provide you with some additional information of who I am and how I see this upcoming year playing out. My past performance evaluations indicate my strengths include honesty, straight forward, gets along well with staff, organized, pays attention to details, dependable, motivated, reliable, etc. *lati dati da*. I agree that these are all good traits of an effective leader, but I feel some of my basic, yet very important, characteristics have been overlooked. I enjoy what I do, I like to celebrate successes, I look forward to change, I like new challenges, and most of all, I feel I’m able to look “Beyond the Numbers”. As the 2004-2005 President of the Show-Me of Missouri Chapter of HFMA, I understand the importance of this leadership role. I accept the responsibilities of this position and will utilize all of these strengths in pursuit of meeting the needs of our members.

Included in this newsletter, you will find a copy of this year’s strategic plan. As you read through it be asking yourself, where do I fit in, how can I become more involved, which committee would I be interested in helping? We want you to be an active participant. Give us your opinions, your suggestions and your support, and we will do our best to provide you with the results you are looking for.

The Show-Me of Missouri Chapter’s Vision Statement states that we “will continue to be the leading professional resource for the individuals seeking excellence in the financial management of healthcare organizations”. This we will do. Our Mission Statement states that we “will improve the financial management of healthcare institutions”. This we will also do. Now, lets go “Beyond the Numbers” and have some fun. I challenge each of you to identify an area within this chapter where you would like to get involved. Communicate that to us and we will see that you’re included. It doesn’t take much time, it’s rewarding, and it is a lot of fun. We will maintain our vision, we will fulfill our mission, and we will create some lifelong friendships. That is how I see this year playing out. ■



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Leading With Vision, Cont.

To shape and formalize your vision statement, I recommend that you follow six integrated steps. Each step contributes unique value to the statement. Each step is simple—even enjoyable!—to complete.

Step 1. Encourage input. No matter how large your team or organization, invite every member who will be expected to strive for the vision to provide thoughts, opinions, data, and responses to the development of the vision statement.

Step 2. Ask questions. As thoughts, opinions, data, and responses come in, seek clarification and explanation and elaboration. As you encourage individuals to share more, they will add more value to what they say.

Step 3. Draft. Simplify. Redraft. Revise. Redraft. Vision statements start off too wordy. Cut back to essential, power-packed words. Imagine that you are sharpening a knife or polishing silver or sanding fine woodwork.

Step 4. Share it. Speak it. Show it. Sign it. Shout it. Sing it. The best test for your vision statement is to show it to the public. You will recognize your statement's strengths and weaknesses by how it feels to express it and by how others receive it. Use every format for expressing it; give your public a chance to receive it from every format.

Step 5. Invite feedback. Obviously.

Step 6. Print it. Distribute it. Believe it. Practice it. For your vision statement to make its desired impact, it cannot just be on your wall or in your annual report.

A Bonus Step. Change your vision statement if it does not work. Changes in the marketplace, your structure, the economy, your services, the regulatory environment, or your leadership/management teams may throw your vision right out the window. When that happens, throw your vision statement out also. Start over.

SIDEBAR
Who Needs A Vision Statement?

Every (large) company expects to have a vision statement.

Boards of Directors approve them. CEO's and Presidents support them.

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But consider the value of a true Vision Statement for:

1. Your department: supporting the hospital's vision statement with a more specific application.
2. Your unit: supporting the department's overall strategy with a vision focused on your unit's functions.
3. Your team/task force: clarifying and expediting the concrete assignment for which the team was created.
4. Your Self: defining and directing your personal/professional values and aspirations. ■

Tim Wright, President
Wright Results
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Strategic Plan

HEALTHCARE FINANCIAL MANAGEMENT ASSOCIATION SHOW-ME OF MISSOURI CHAPTER

STRATEGIC PLAN, June 1ST, 2004 THRU May 31ST, 2005

Values of Chapter

The values of the Show-Me of Missouri Chapter are:

- The Chapter will provide value added service to our members.
- Teamwork is essential to our mission and success.
- Individuals are important and should be treated with respect, dignity, and fairness.
- The organization and its membership will act in a financially responsible manner.

Chapter Assessment

The chapter will perform assessments on its achievement of its mission and goals throughout the coming year. These assessments will be accomplished by:

- *Education and Programs*—*education* in topics relating to healthcare financial management is the most important value our chapter provides to both our members and non-members in the healthcare field. Our best-attended programs continue to be those that present Medicare/Medicaid information regarding reimbursement and billing or other timely topics affecting our industry. Other organizations, such as Missouri Hospital Association, MGMA, AAHAM and other HFMA Chapters are also offering similar educational programs on these topics.
- *Networking Opportunities*—*many* of our members find value in the relationships they develop with their peers from other area institutions, vendors, and organizations while attending chapter meetings. These relationships facilitate the sharing of the most up-to-date information on current financial topics and issues in our industry.
- *Declining Membership* our chapter's membership continues to decline by small margins every year. This continued decline is a major concern. Most hospitals, medical group practices, and employers are reducing the number of members they will support both from a time and financial perspective.
- *Serving Less Active Members*—*many* of our members take part only at a minimal level in the HFMA organization. They fail to fully participate and take full advantage of the benefits of the organization. We need to improve our communication and identify the issues that may be preventing them from greater involvement.

Chapter Goals

The Educational goals of the chapter are:

- Continue to enhance the quality of the educational opportunities our Chapter offers—ensuring it meets the diversified needs of our members.

- Offer breakout sessions at our meetings to meet these diversified needs.
- Offer at least one non-traditional educational session for our sponsors and vendors.
- Maintain the quality and timeliness of our mailings for our educational offerings.
- Enhance online notification of our education offerings.
- Establish on-line registration for chapter meetings.
- Increase the number of educational opportunities for chapter members.
- Develop the process to assist attendees in obtaining CPE credits for educational sessions.

The Membership Goals of our Chapter are:

- Increase membership of our chapter by five percent.
- Increase attendance at chapter meetings by three percent using DCMS data.
- Identify new members in our quarterly mailings and develop a program of orientation for the new members to the Chapter.
- Develop a process to mentor new members to the Chapter.
- Encourage greater participation of membership on board and committees.
- Survey membership for interest in participation in Chapter committee and leadership opportunities.
- Have at least two new certified members, including one Board member.
- Increase member accomplishment recognition at all chapter functions.
- Identify potential new candidates for future leadership roles within the Chapter.

The Chapter Operations Goals of the Chapter are:

- Hold a strategic planning meeting.
- Increase the financial viability of our chapter and establish financial targets.
- Further enhance the chapter website, membership directory, and newsletters.
- Hold a Mini-LTC to develop new board members and officers.
- Update and further develop the chapter's organization manual.
- Maintain a high level of participation of Board and committee chairs in annual Leadership Training.
- Review and update the chapter's bylaws as necessary.

The Chapter Sponsorship Goals of the Chapter are:

- Provide a personal survey with each of our sponsors to determine their satisfaction with the chapter, to identify additional needs, and for obtaining their suggestions for improvements.
- Maintain the mailings to thank sponsors and non-members for attendance at meetings.
- Change the Sponsorship year to follow the calendar year.
- Increase our chapter's sponsorship revenues by 10%.

Specific Implementation Plan

The implementation plan to ensure the success of our chapter's goals, are:

- Develop the 2004-2005 Strategic Plan and build a Budget to meet the goals of the plan. Present the Strategic Plan and Budget to the Board for their approval by May 31, 2004.
- Mini Leadership Training Course to be held after the conclusion of our Spring Conference in May.
- Introduce the 2004-2005 Strategic Planning to our chapter members at the opening session of the July meeting.
- Follow-up on non-renewals of membership as information is available from National HFMA.
- Develop a succession plan to ease the transition of our leadership as they accept new roles and responsibilities.
- Review the functionality and organizational structure of our Officer and Board positions to ensure for complete and effective administrative coverage. ■



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