



# Financial Operations Management Level 3

### 2024 TRAINING



This program has been recommended for 14.1 CPE and 11.8 CEU in the "Specialized Knowledge" category.

#### **Delivery Method:**

Group Live and Group Internet-Based

#### Prerequisites and/or Pre-Work:

A minimum of five years working in the health care sector in a financial, management, or administrative role.

#### **Program Level:**

Advanced

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Duration of Training:
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Two days

## This training will focus on the following CFO Competencies:

- Leadership (Level 4)
- <u>Risk Management (Level 3)</u>
- <u>Strategic Management and Marketing</u>
  (Level 3)

These competencies align with NACHC's Value Transformation, with detailed descriptions of knowledge and skill levels. NACHC resources are mapped to competencies in the TTA Catalog.

#### **ACCOUNTING PROFESSIONALS (CPE)**

The National Association of Community Health Centers, Inc. (NACHC) is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.nasbaregistry.org. (Sponsor #108392)

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# Financial Operations Management Training Workshop Level 3 (FOM 3)

Hybrid • April 10 - 11, 2024

NACHC is pleased to offer health center Financial/Operations Management National Training Workshops. The FOM training series offers basic, intermediate, and advanced level training to suit the needs of today's health center leaders. Each level features a training curriculum designed with the innovative knowledge, tools, and best practices required to meet the unique challenges of operating a health center. Although it is not required to attend the series in order, each training curriculum is designed to build on the other.

FOM 3 is designed to provide established CEOs, CFOs, COOs, Controllers, Finance Managers, and accountants with high-level approaches to concepts of management and leadership, leveraging data for decision-making, creating high-performing teams, and defining the principles of an effective compliance program for health centers.

#### Learning Objectives:

By the end of this two-day training, participants will be able to:

- Distinguish between the concept of leadership and management and explain how both are necessary to drive operational and strategic performance.
- > Analyze data using metrics to make financial and operational decisions.
- Use provider incentive programs to drive performance.
- Identify elements of an effective compliance program and develop an appropriate compliance work plan for your health center.

#### **Presenters:**

Curt Degenfelder, President, Curt Degenfelder Consulting, Inc.

Dianne K. Pledgie, Esq., Partner, Feldesman Leifer LLP

Dolores Di Re, Senior Manager, CohnReznick LLP

Scott Gold, Partner, FORVIS LLP

Steven Schwartz, Partner, CohnReznick LLP

#### **Registration Pricing Information**

- Early Bird Registration Fee: \$875 if received by March 27, 2024.
- Regular Registration Fee: \$975 if received after March 27, 2024.
- Registration Cutoff Dates:
  - Last day to register for in-person attendance: April 4, 2024.
  - Last day to register for virtual attendance: April 8, 2024.
- Enjoy a 10% group discount for 3+ attendees from the same organization, whether virtual or inperson. Applies to Early Bird and Regular Registration rates for National Workshops after February 1, 2024.

To register online for this training, visit: **www.nachc.org** and click on Trainings & Events.

For questions and comments, please contact the Training & T/A Department: Email trainings@nachc.org or call (301) 347-0400.

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- Hotel: Hyatt Place Denver/Downtown 440 14th Street Denver, CO 80202
- Group Rate: \$199
- Reservation Cutoff: April 2, 2024
- Instructions: Book your room online here.

NACHC has negotiated a discounted rate of **\$199/night**, which will be honored until these days or until the block has sold out, whichever occurs first.

**Tip:** We encourage you to register and pay (by credit card) for this training and book your hotel accommodations on the same day. A confirmed hotel reservation does not guarantee a spot in the training. If you have not received confirmation for participation in the training, you will be responsible for any hotel cancellation fees.

## Day One: April 10, 2024 Hybrid LIVE in Mountain Time (MT)

8:00 am - 9:00 am	Breakfast			
9:00 am - 10:30 am	Leadership and Management in Health Centers			
	Leadership and management are two distinctive and complementary systems of action. The challenge is to combine strong			
	leadership and strong management and use each of them to enhance the other.			
	Curt Degenfelder, President, Curt Degenfelder Consulting 1.8 CPE/ 1.5 CEU			
10:30 am - 10:45 am	Break			
10:45 am - 12:00 pm	Corporate Compliance: Integrating Leadership and Management Maintaining compliance with applicable legal requirements cannot rest on the health center's Compliance Officer alconstructure initiatives that require both leadership an management to be successful. This session will explain the role of accountability for compliance, elements of an effect strategy for maintaining compliance, and tools for managing the implementation of a compliance program. Dianne Pledgie, Partner, Feldesman Leifer LLP 1.5 CPE/ 1.25 CEU			
12:00 pm - 12:55 pm	Lunch			
12:55 pm - 1:45 pm	Corporate Compliance: Integrating Leadership and Management (cont.) 1.0 CPE / 0.8 CEU			
1:45 pm - 2:00 pm	Break			
2:00 pm - 3:30 pm	Provider Compensation and Incentive Programs			
	Recruiting and retaining provider staff is an ever-growing challenge for community health centers. This session will discuss total provider compensation – both salaries and fringe benefits – as well as other drivers of provider satisfaction. The session			
	will also present a basic incentive compensation system for providers.			
	Curt Degenfelder, President, Curt Degenfelder Consulting 1.8 CPE/ 1.5 CEU			
3:30 pm - 3:45 pm	Break			
3:45 pm - 5:00 pm	Provider Compensation and Incentive Programs (cont.) 1.5 CPE / 1.25 CEU			
Day Two: April 11,	2024 Hybrid LIVE in Mountain Time (MT)			
8:00 am - 9:00 am	Breakfast			
9:00 am - 10:30 am	<b>Revenue Cycle Risk Management</b> Vulnerabilities in finance and revenue cycle management can be financially devastating on centers. A Revenue Cycle Management department vulnerability assessment is an evaluation of the organization's procedures, systems, and controls to identify weaknesses and potential threats that could impact its ability to generate or collect revenue. Creating systems, processes, procedures, and reporting structures designed to identify, analyze, monitor, and mitigate drastic changes in revenue is critical to minimize risk and sustain a healthy revenue cycle. This session will cover evaluating risk and improving internal controls.			
	Dolores Di Re, Senior Manager, CohnReznick LLP Steven Schwartz, Partner, CohnReznick LLP 1.8 CPE/ 1.5 CEU			
10:30 am - 10:45 am	Break			
10:45 am - 12:00 pm	Benchmarking and Analyzing Costs for Improving Operations			
	Learn about health center industry benchmarks and how to use them in your practice to better manage cost, productivity and revenue by establishing goals and objectives for budgeting and realization of better financial performance. Scott Gold, Partner, FORVIS LLP 1.5 CPE/ 1.25 CEU			
12:00 pm - 1:00 pm	Lunch			
1:00 pm - 2:00 pm	Evaluating Fraud Risks and Improving Internal Controls			
	Fraud can wreak havoc on an organization's financial performance and undermine business objectives. No business is immune from the risks associated with fraud, and community health centers are no exception. Health care organizations have some unique and rampant risks for fraud and embezzlement. This session will cover evaluating risk and improving internal controls. Scott Gold, Partner, FORVIS LLP 1.2 CPE/ 1.0 CEU			
2:00 pm - 2:15 pm	Break			
2:15 pm - 4:00 pm	Reporting and Analytics - Decision Driven Data			
	In the fast-paced and ever-changing world of healthcare, operational efficiency has become critical for centers. The intricacies of revenue cycle management are constantly evolving, pushing centers to seek out advanced technologies that can optimize their financial processes and boost revenue optimization. Excel-based reports have been replaced with data-driven, business-intelligence platforms. Accurate data analytics can be a game-changer offering invaluable insights and transforming how revenue is managed. This session will discuss key revenue cycle metrics and the importance of data			

analytics. Dolores Di Re, Senior Manager, CohnReznick LLP Steven Schwartz, Partner, CohnReznick LLP 2.0 CPE/ 1.75 CEU

REGISTRATION FOR			NATIONAL ASSOCIATION OF	
-	perations Management		Community Health Centers	
Training Workshop Level 3 (FOM 3)			<b>Financial Operations</b>	
PARTICIPANT INFORMATION			Management Training Workshop Level 3 (FOM 3)	
			April 10 - 11, 2024	
Name			Hybrid	
Title		Thre	e Ways To Register:	
Email		@	<b>ELECTRONICALLY</b> Online registration is available. Go to <b>www.nachc.org</b>	
Organization			Click Trainings, find the date and name of the training and click "register now."	
Address		$\bowtie$	MAIL Mail Registration to:	
City, State	Zip		NACHC Meetings/Acct. Dept. 7501 Wisconsin Avenue Suite 1100W	
Phone ()	Fax ()		Bethesda, MD 20814 Mail registration by March 21,	
ATTENDANCE METHOD	<b>Check One)</b> ATTEND ON-SITE ATTEND VIRTUALLY		2024.	
COST INFORMATION Financial Operations Management Training Workshop Level 3 (FOM 3) Registration is based on a 100-participant availability capacity or the indicated online registration cut-off date, whichever occurs first.* Enjoy a 10% group discount for 3+ attendees from the same organization, whether virtual or in-person. Applies to Early Bird and Regular Registration rates for National Workshops after February 1, 2024.			FAX Send registration form with credit card information to (301) 347-0457. Fax registration by April 1, 2024. E: Registration forms will not be essed without payment.	
Early Bird Registration	\$875 per person	,		
Regular Registration	(if received by March 27, 2024)			
Regular Registration	\$\$975 per person (if received after March 27, 2024)		IC CANCELLATION POLICY: All ellations must be in writing and	
* Registration cutoff date (Last day to register online): April 8, 2024		must be received at NACHC on/before March 27, 2024.		
PAYMENT INFORMATION			ancellations received on/before arch 27, 2024 will be assessed a	
Check (payable to NACHC) C MasterCard Visa American Express			00 processing fee. ancellations received after <b>March</b>	
Total amount enclosed \$			7, 2024 are not refundable.	
Card Number Expiration Date			ancellations after the conclusion of e training are non-refundable.	
		• S	ubstitutions <u>are</u> encouraged.	
Print name as it appears on credi	t card	• "N	lo Shows" are non-refundable.	
Cardholder's signature			ncel your reservation, please send a est in writing to ngs@nachc.org.	
	ntil NACHC confirmation is received. This may take up to two weeks from NACHC's . DO NOT mail your forms after March 21, 2024 or fax your forms after April 1,	aunn	igsendenciory.	

2024.