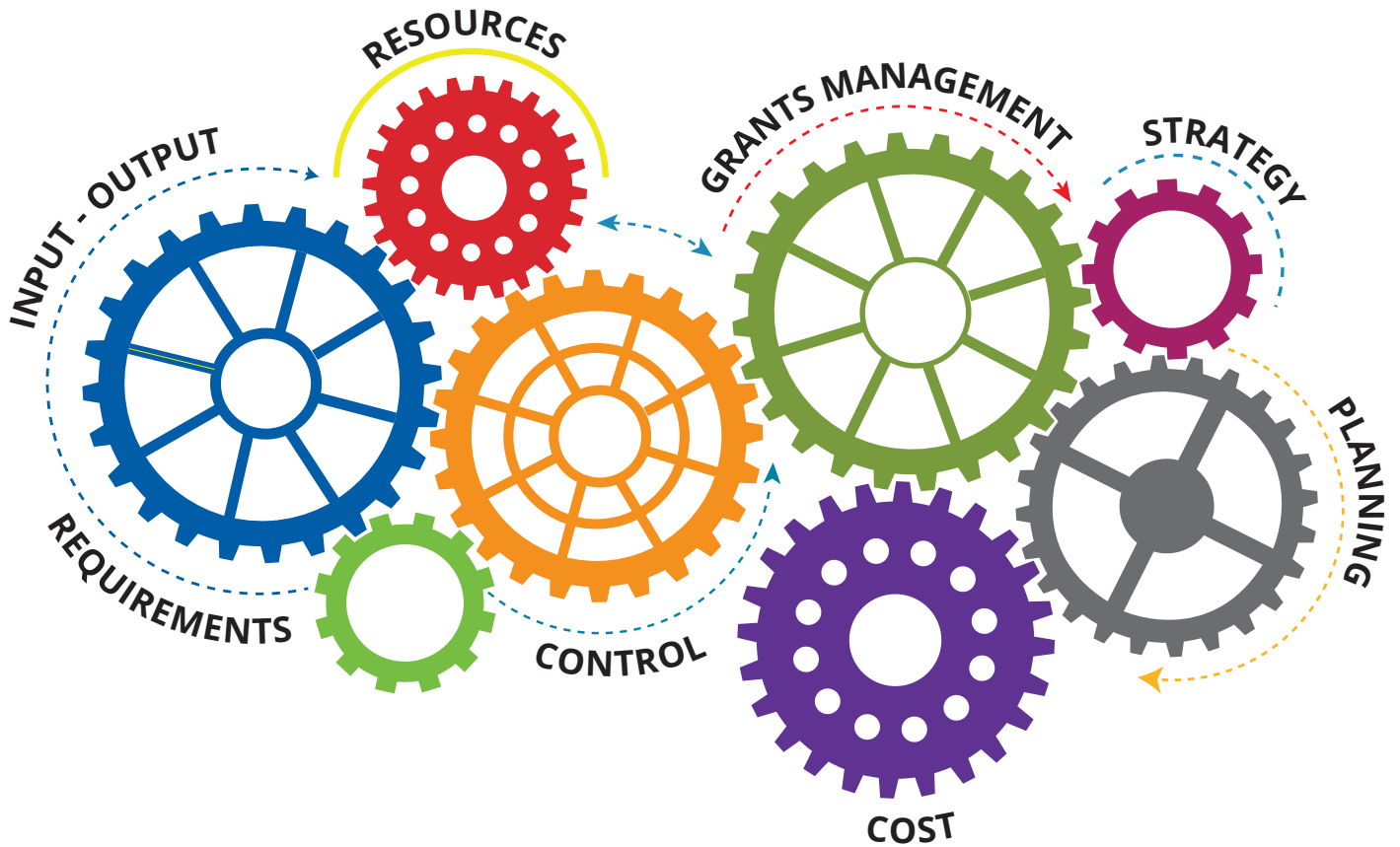




NATIONAL ASSOCIATION OF  
COMMUNITY HEALTH CENTERS®



# Financial Operations Management I

*The Nuts and Bolts of HC Financial Operations*



NATIONAL ASSOCIATION OF  
COMMUNITY HEALTH CENTERS®

## 2025 TRAINING

# Financial Operations Management I

## *The Nuts and Bolts of HC Financial Operations*

March 19–20, 2025

New Orleans, LA

This training will provide Continuing Education Unit (CEU) and Continuing Professional Education (CPE) credits. This program has been recommended for 14.6 CPE in the “Specialized Knowledge–Technical” category and 12.5 CEU.

### Delivery Method:

Group Live

### Prerequisites/Pre-Work:

Participants must have 3 years of experience at the supervisory or above level in reviewing transactions processed through the accounting ledger.

### Program Level:

Intermediate

### Duration of Training:

Two Days

### Advance Preparation:

None

If you have any questions, please reach out to [eventlogistics@nachc.com](mailto:eventlogistics@nachc.com).

## 2025 TRAINING

# Financial Operations Management I

## *The Nuts and Bolts of HC Financial Operations*

NACHC’s Financial Operations Management Training Workshop offers an intermediate-level exploration into essential financial operations for health centers, focusing on grants management, budgeting, profitability, and Medicare cost reporting. Designed for CEOs, CFOs, COOs, Controllers, Finance Managers, and accountants, this two-day training provides participants with the tools to enhance financial decision-making, streamline reporting processes, and strengthen financial sustainability. Attendees will delve into CFO Competencies, including Grant Compliance, Accounting and Finance Operations, and Business Communication, with a hands-on approach to real-world financial challenges facing Community Health Centers.

- ▶ **Operational Budget Development:**  
Develop a comprehensive operational budget aligned with financial goals and compliance by completing a sample budget exercise.
- ▶ **Profitability Drivers:**  
Identify and apply three key drivers of profitability using industry benchmarks to enhance financial performance.
- ▶ **Medicare Cost Report Mastery:**  
Accurately complete a Medicare Cost Report, achieving 90% accuracy in a practice exercise.

This training will focus on the following CFO Competencies:

- Grant Compliance (Level 3)
- Accounting and Finance Operations (Level 3)
- Business Communication (Level 3)

— New Orleans, LA • March 19–20, 2025 —

### Pricing Information:

**Early Bird Registration Fee:** \$875 if registration received by March 5, 2025

**Regular Registration Fee:** \$975 if received after March 5, 2025

**Registration Cut-off Date:** March 13, 2025

To register online for these seminars, visit: [www.nachc.org](http://www.nachc.org) and click Trainings & Events. For questions, comments or complaints contact [trainings@nachc.org](mailto:trainings@nachc.org) or 301-347-0400

### Hotel Information:

**Hotel:** Courtyard New Orleans Warehouse Arts District

**Address:** 300 Julia St, New Orleans, LA 70130

**Group Rate:** \$159/night

**Hotel Reservation Cutoff Date:** February 17, 2025

**Instructions:** Book your room online [here](#).

NACHC has negotiated a discounted rate from March 18-20, 2025, which will be honored until the cutoff date 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 1 • Wednesday, March 19, 2025**

9:00 – 11:00 am

**The Community Health Center of 2030**

This session will address the current trends of health care and the issues that the CHC of 2030 may face. Will risk-based contracts be the norm? Will collaboration with hospitals or other health care providers be financially significant to the bottom line? What will compliance look like in 2030? Understanding that some variables are unknown, what financial and operational decisions should be considered to strengthen financial metrics, improve operating performance, and reduce risk? What resources, both financial and human, will be needed to meet the challenges of the future? Special consideration will be given to best practices in the strategic planning process to help CHCs financially prepare for providing primary and preventative health care in the future.

***Gervean Williams, MS, MIT, Director, Health Center Finance Training, NACHC***

***2.4 CPE Specialized Knowledge – Technical/ 2.0 CEU***

11:00 – 11:15 am

**Break**

11:15 am–12:30 pm

**Grants Management, Health Center Policies, and Preparing the Federal Financial Report**

Effective grants management is crucial for the sustainability and compliance of Community Health Centers (CHCs). This session will guide participants through the essential elements of managing federal grants, with a specific focus on HRSA-funded programs. We will begin by exploring the policy guidelines outlined in HRSA's Financial Capacity Review document, providing participants with a clear understanding of the expectations and standards required for Health Center grants management policies. The session will also address other critical policy considerations that CHCs must navigate, ensuring they remain aligned with federal regulations. Participants will gain insights into common findings from HRSA site visits, learning from past experiences to avoid common pitfalls and enhance their readiness for HRSA Operational Site Visits. The session will conclude with a detailed walkthrough of preparing Federal Financial Reports (FFRs), ensuring that attendees are equipped with the knowledge and tools to meet reporting requirements accurately and efficiently.

***Catherine Gilpin, CPA, Partner, Forvis Mazars, LLP***

***3.8 CPE Specialized Knowledge – Technical / 3.25 CEU***

12:30 – 1:30 pm

**Lunch**

1:30 – 3:30 pm

**Grants Management, Health Center Policies, and Preparing the Federal Financial Report, *continued***

3:30 – 3:45 pm

**Break**

**Day 1 • Wednesday, March 19, 2025, continued**

3:45 – 5:00 pm

**NEW: Focus on Indirect Costs: The Use of the De Minimis Rate or Negotiated Indirect Cost Rate Agreements with Federal Grant Funding**

During this session, we will delve into the intricate realm of indirect cost rate proposals and the pivotal role of negotiated indirect cost rate agreements (NICRAs) in regard to federal grant funding. Indirect costs are an essential component of federally funded projects, yet navigating the complexities of their determination can be daunting. This presentation aims to clarify the processes, challenges, and benefits associated with developing indirect cost rate proposals. Furthermore, it explores the advantages of securing a NICRA, emphasizing its potential to streamline administrative burdens. Attendees will gain valuable insights into improve indirect cost recovery mechanisms including the potential use of the De Minimis rate as an option over a NICRA.

**Catherine Gilpin, CPA, Partner, Forvis Mazars, LLP**

**1.5 CPE Specialized Knowledge – Technical / 1.25 CEU**

**Day 2 • Thursday, March 20, 2025**

9:00 – 11:00 am

**Medicare Cost Report**

There are unique aspects to how health centers must bill and receive payment for the services they provide.

Explanations of how reimbursement for Medicare PPS, Medicaid, sliding fee scales, and other revenue streams operate are discussed. This session will also cover Medicare cost reporting including discussion on patient visits, reclassifications and adjustments, and the draft of the new Medicare Cost Report form.

**Jeff Allen, CPA, Partner, Forvis Mazars, LLP**

**2.4 CPE Specialized Knowledge – Technical / 2.0 CEU**

11:00 – 11:15 am

**Break**

11:15 am – 12:30 pm

**Introduction to Value-Based Care**

Change in anything is often met with trepidation but change often brings opportunities. During this session we will review the fundamentals of value-based care and how it compares to the current reimbursement environment for FQHC's. We will also discuss the financial implications of value-based care and share how proposed changes can be a win-win for both patients and your financial statements. A discussion will occur on staffing priorities for value-based care along with financial opportunities and some pitfalls to avoid during the transition.

**Steve Schwartz, CPA, Partner, CohnReznick**

**Aparna Mekala, Principal, CohnReznick**

**2.6 CPE Specialized Knowledge – Technical / 2.25 CEU**

12:30 – 1:30 pm

**Lunch**

**Day 2 • Thursday, March 20, 2025, continued**

1:30 – 2:30 pm      **Introduction to Value-Based, continued**

2:30 – 2:45 pm      **Break**

2:45 – 4:30 pm      **Budgeting and Profitability**

Health centers need to have positive bottom lines to fund growth and development. This session will show the link between budgeting and profitability and identify key drivers of the health center's bottom line.

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.

**Steve Schwartz, CPA, Partner, CohnReznick**

**2.0 CPE Specialized Knowledge – Technical / 1.75 CEU**



**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](http://www.nasbaregistry.org). (Sponsor #108392)

This program was supported by the Health Resources and Services Administration (HRSA) of the U.S. Department of Health and Human Services (HHS) as part of an award totaling \$6,625,000 with 49 percentage financed with non-governmental sources. The contents are those of the author(s) and do not necessarily represent the official views of, nor an endorsement, by HRSA, HHS, or the U.S. Government. For more information, please visit [HRSA.gov](http://HRSA.gov).

# REGISTRATION FORM

2025 TRAINING

## Financial Operations Management I

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### PARTICIPANT INFORMATION

Name \_\_\_\_\_

Title \_\_\_\_\_

Email \_\_\_\_\_

Organization \_\_\_\_\_

Address \_\_\_\_\_

City, State \_\_\_\_\_ Zip \_\_\_\_\_

Phone (\_\_\_\_) \_\_\_\_\_ Fax (\_\_\_\_) \_\_\_\_\_

### COST INFORMATION\*

Early Bird Registration \$875 per person  
(if received by March 5, 2025) \$ \_\_\_\_\_

Regular Registration \$975 per person  
(if received after March 5, 2025) \$ \_\_\_\_\_

### PAYMENT INFORMATION

(Payment **MUST** be received with registration form.)

Check (payable to NACHC)  MasterCard  Visa  American Express

Total amount enclosed \$ \_\_\_\_\_

Card Number \_\_\_\_\_ Exp. Date \_\_\_\_\_

Print name as it appears on credit card \_\_\_\_\_

Cardholder's signature \_\_\_\_\_

*Note: Registration is not final until NACHC confirmation is received.  
This may take up to two weeks from NACHC's receipt of REGISTRATION FORM.*



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### THREE WAYS TO REGISTER



#### ELECTRONICALLY

Online registration is available.  
Go to [www.nachc.org](http://www.nachc.org).  
Click Trainings, find the date and  
name of the training and click  
"register now."



#### MAIL

Mail Registration to:  
NACHC Meetings/Acct. Dept.  
7501 Wisconsin Avenue  
Suite 1100W  
Bethesda, MD 20814  
**Mail Registration by  
February 5, 2025**



#### FAX

Send registration form with credit  
card information to (301) 347-0457.  
**Fax Registration by  
February 26, 2025**

**NOTE: Registration forms will not be  
processed without payment.**

#### ATTENDEE CANCELLATION POLICY:

All Cancellations must be in writing and  
must be received at NACHC on/before  
March 5, 2025.

- Cancellations received on/before  
March 5, 2025 will be assessed a \$100  
processing fee.
- Cancellations received after  
March 5, 2025 are not refundable.
- Cancellations after the conclusion of  
the training are non-refundable.
- Substitutions are encouraged.
- "No Shows" are non-refundable.

To cancel your reservation, please send  
a request in writing to the Training and  
Technical Assistance Department at  
[eventlogistics@nachc.com](mailto:eventlogistics@nachc.com).

#### NACHC CANCELLATION POLICY:

If NACHC cancels or postpones a  
conference or online offering,  
NACHC will automatically issue a  
100% registration refund.

For more information on our cancellation  
policies please contact our offices at  
301-347-0400.