

# 2024–2025 Chief Financial Officer Leadership Institute (CFOi)

*6-month program: October 2024 to April 2025*



NATIONAL ASSOCIATION OF  
COMMUNITY HEALTH CENTERS®

## CFO Leadership Institute

### Dates:

6 – month program;  
October 2024 – April 2025

### Delivery Method:

In-Person

### Locations:

- Kick-off program orientation on October 26-27, 2024, in San Francisco, CA
- Monthly virtual sessions
- Closing program session on April 17, 2025, in Charlotte, NC

### Who Should Attend:

This training is most appropriate for individuals new to the CFO role, new to the health center field as a CFO, or those seeking a financial leadership education refresher. It is open for all health center CFOs (or equivalents) to apply.

## Chief Financial Officer Leadership Institute (CFOi)

The 2024–2025 NACHC Chief Financial Officer (CFO) Leadership Institute (CFOi) is a six-month training program for health center CFOs to learn with and from peers and grow in proficiency of selected core competencies. The institute includes expert-led courses, practice-based case studies, mentorship from experienced FQHC CFOs, peer networking, and personal assessment to build self-knowledge.

The program kicks off with a two-day orientation on October 26-27, 2024, ahead of NACHC's FOM/IT Conference and Expo in San Francisco. The orientation will highlight the 'soft skills' necessary for leading a division and managing people through emotional intelligence and provide an opportunity for peer networking. The program continues with six monthly virtual workshops on selected core competencies for the FQHC CFO such as, revenue cycle management, grants management, data security, business continuity, and more. Throughout the six months participants will also work in groups, led by an experienced mentor CFO, on a case study project to demonstrate proficiency in selected competencies. Those capstone projects will be presented at the closing workshop on April 17, 2025, in Charlotte, North Carolina.

### Learning Objectives:

This training will prepare learners to:

- ▶ Refine and improve selected health center CFO core competencies for direct application to on-the-job situations.
- ▶ Demonstrate emotional intelligence in leading a team and as part of the executive suite.
- ▶ Cultivate a network of peers/mentors to engage for insights and support employing strategic financial leadership skills.

### How to Register:

Potential participants must complete an application and be accepted into this program. Upon submission of the application, NACHC staff will review your application and notify you of your acceptance within five business days. After the application is accepted, NACHC will send the participant registration/payment instructions and any relevant hotel block information. Participants are responsible for arranging their own travel arrangements to in-person events. Hotel costs and any other travel expenses are not included in the registration fees.

Applications will be accepted on a rolling basis until the course is full (approximately 60 participants) or until registration closes on October 11. A waiting list will be developed once the course has reached capacity. Wait listed applicants will be given priority to fill a cancellation spot.

[APPLY TO THE CFOi](#)

### Training Pricing Information:

**Early Bird Registration Fee:** \$1750/per person

(must pay registration fee on or before September 30)

**Regular Registration Fee:** \$1950/per person

(must pay registration fee on or before October 11)

The registration fee includes participant fees for all in-person and virtual workshop attendance and mentor group participation. It also includes breakfast, coffee break, and lunch at both in-person events.

# 2024-25 NACHC CFO Leadership Institute (CFOi24) Curriculum At-A-Glance

		OCT 2024	NOV 2024	DEC 2024	JAN 2025	FEB 2025	MAR 2025	APR 2025
Participant Time Commitment		Complete pre-assessments, and attend 2-day Opening Session (~18-20 hours)	Participate in 1 faculty-led learning event, 1 self-paced module, 1 mentor group meeting, and online community (~4-6 hours)	Participate in 1 faculty-led learning event, 1 self-paced module, 1 mentor group meeting, and online community (~4-6 hours)	Participate in 1 faculty-led learning event, 1 self-paced module, 1 mentor group meeting, and online community (~4-6 hours)	Participate in 1 faculty-led learning event, 1 self-paced module, 1 mentor group meeting, and online community (~4-6 hours)	Participate in 1 faculty-led learning event, 1 self-paced module, 1 mentor group meeting, and online community (~4-6 hours)	Participate in 1 faculty-led learning event, 1 self-paced module, 1 mentor group meeting, online community, and attend 1 day Closing Session (~12-14 hours)
	Pre-Work For Learning Events Self-study content designed to complement faculty-led learning events	Join Online Community & Complete Welcome Activity (no learning module/webinar, "getting started" activities only)	On or Before Nov 14, 2024 <b>Module 1</b> Review online module and complete pre-webinar activities	On or Before Dec 12, 2024 <b>Module 2</b> Review online module and complete pre-webinar activities	On or Before Jan 6, 2025 <b>Module 3</b> Review online module and complete pre-webinar activities	On or Before Feb 19, 2025 <b>Module 4</b> Review online module and complete pre-webinar activities	On or Before March 6, 2025 <b>Module 5</b> Review online module and complete pre-webinar activities	On or Before April 1, 2025 <b>Module 6</b> Review online module and complete pre-webinar activities
	Faculty-led Learning Events Monthly 2pm ET (90 minutes)	<b>Curriculum Schedule posted in Online Community</b>	Nov 21, 2024 <b>Leading a Finance Department in a Health Center</b> Jim Sinkoff, MBA, CPA Deputy CEO & CFO Sun River Health (NY)	Dec 19, 2024 <b>Grants Management</b> Catherine Gilpin, CPA Partner Forvis Mazars US	Jan 7, 2025 <b>Revenue Cycle and Reimbursement</b> Gervean Williams, Director, Finance Training and Technical Assistance, NACHC	Feb 26, 2025 <b>Information Management and Security</b> Isaiah Nathaniel, CPHIMS, VP & CIO Delaware Valley Community Health (PA)	March 13, 2025 <b>Risk Management and Business Continuity</b> Michael Tracy, MBA Managing Principal OMNI Human Resource Management	April 8, 2025 <b>Strategic Management</b> Jonathan Chapman, MBA President and CEO Florida Assoc of CHCs
	Peer Mentoring Small group discussions	<b>Mentor Group Assignments posted in Online Community</b>	Mentor Group meeting on date agreed upon by Mentor Group	Mentor Group meeting on date agreed upon by Mentor Group	Mentor Group meeting on date agreed upon by Mentor Group	Mentor Group meeting on date agreed upon by Mentor Group	Mentor Group meeting on date agreed upon by Mentor Group	Mentor Group meeting on date agreed upon by Mentor Group
	Opening and Closing Sessions Program Kick-off & Wrap-up	<b>October 26-27, 2024</b> CFOi Kick-off TWO-DAY San Francisco, CA 7:30 AM – 5:00 pm PT						<b>April 17, 2024</b> CFOi Wrap-up ONE-DAY Charlotte, NC 7:30 AM – 5:00 pm ET

# 2024–2025 Chief Financial Officer Leadership Institute (CFOi)

This training requires an application to ensure that you are the right audience for this training. We want to verify that you are in a financial c-suite or executive role at a FQHC and collect some basic information about your organization.

The application is reproduced below for your reference.

[Please complete the application here](#)

**Applicant (Full Name):**

**Degree/Certification (if any):**

**Job Title/Role:**

**Organization Address Line 1:**

**Organization City, State, Zip:**

**Telephone:**

**Cell Phone (emergency):**

**Email:**

**Assistant's Name (write N/A if not applicable):**

**Assistant's Email (write N/A if not applicable):**

What best describes your organization type? {multiple choice}

- Federally funded Primary Care Association (PCA) or National Training & Technical Assistance Partner (NTTAP)
- FQHC Look-Alike Health Center
- Federally Qualified Health Center
- Other (please specify)

Please provide the name of your PCA or NTTAP organization:

Please enter your health center/organization name as reported in UDS:

Please list your health center/organization information:

- State/Territory {Drop-selection}
- Health Center/Organization {Drop-selection}

What is the total number of patients served by your health center/organization in calendar year 2023?

What are the total number of patient encounters/visits for your health center/organization in calendar year 2023?

How many years/months have you been employed as a CFO (or equivalent) at a health center?

How many years/months in total have you been employed at a health center?

Please name 3-4 things related to your role and the objectives of this program that you most want to learn and apply from this Institute.

Please initial each item indicating your commitment to participate in all aspects of the CFOi.

- I will attend the TWO required in-person workshops as part of the CFO Leadership Institute. These trainings will take place on: October 26-27, 2024, in San Francisco, CA just before the NACHC Financial Operations Management and IT (FOM/IT) conference and April 17, 2025, in Charlotte, North Carolina. Travel expenses are not covered by the Institute fees.
- I will actively participate in the CFO Leadership Institute online community.
- I will prepare for and actively participate in each of the scheduled virtual events throughout the six-month Institute (two - three per month). See the Curriculum At A Glance for more information. If you do not attend at least 75% of these activities, you may not successfully complete the Institute.
- I will actively engage with my assigned mentor group throughout the Institute.

If you cannot agree to ALL FOUR conditions above, please explain:

Do you have any food allergies or dietary restrictions? If yes, please explain.