



NATIONAL ASSOCIATION OF  
COMMUNITY HEALTH CENTERS®



# Financial Operations Management II

## *Innovative Financial Strategies & Operational Synergy for HC Success*



NATIONAL ASSOCIATION OF  
COMMUNITY HEALTH CENTERS®

## 2025 TRAINING

# Financial Operations Management II

## *Innovative Financial Strategies & Operational Synergy for HC Success*

April 2-3, 2025

This training will provide Continuing Education Unit (CEU) and Continuing Professional Education (CPE) credits. Recommended CEUs and CPE credit units in the "Specialized Knowledge" category will be available for this program and posted on our website by December 1, 2024.

### Delivery Method:

Virtual

### 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/Advanced

### 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 II *Innovative Financial Strategies & Operational Synergy for HC Success*

This comprehensive two-day workshop is designed to equip health center financial leaders with the advanced knowledge and tools needed to optimize financial operations in today's rapidly evolving healthcare environment. Participants will explore the expanding role of the CFO, develop strategies for maximizing cash flow, and learn how to leverage technology and operational processes for enhanced financial performance. This training is critical for both new and seasoned financial professionals striving to lead their organizations toward operational excellence.

### Learning Objectives:

- ▶ Understand the evolving role of the Health Center CFO and develop strategies to transition from a record-keeping focus to high-level financial planning.
- ▶ Analyze operational processes and identify opportunities for financial performance improvement by integrating finance and operations management.
- ▶ Develop effective cash flow management techniques and understand how to use technology securely to optimize data flow and operational efficiency across health center departments.

Virtual • April 2-3, 2025

### Pricing Information:

**Early Bird Registration Fee:** \$875 if registration received by March 19, 2025

**Regular Registration Fee:** \$975 if received after March 19, 2025

**Registration Cut-off Date:** March 27, 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



### 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.nasbregistry.org](http://www.nasbregistry.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).



## Financial Operations Management II *Innovative Financial Strategies & Operational Synergy for HC Success*

### Day 1 • Wednesday, April 2, 2025

11:00 am – 12:30 pm **Score Keeper to Strategist The evolving role of the Health Center CFO**  
Health Care is becoming more and more complex to navigate. Many health center management teams are noticing that the demand for high-level financial planning is increasing. This is taking more and more of the Chief Financial Officer's (CFO) time and is forcing the CFO to delegate many of the record keeping functions that occupied time previously. Welcome to the changing role of the CFO in the health center industry. We will discuss how health center CFOs must do what they can to delegate the record keeping function of the health center to free up their time for more forward-thinking activities. We will discuss the staffing needs of the health center in order to be able to accomplish this mission and also discuss how to navigate situations where the finance department is small and delegation is difficult. We will also discuss the potential pitfalls and likely future audits that wait for the post-COVID CFO and tips and hints to prepare for what is coming.

*Jeff Allen, Partner, Forvis Mazars*

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

12:30 – 12:45 pm **Break**

12:45 am–2:15 pm **Operations Assessment: Maximizing Financial Performance through Operational Excellence**  
This session will explore practical management and operational techniques that health centers can leverage to enhance financial performance throughout the patient visit process—before, during, and after. Participants will also review the critical synergy between finance and operations, emphasizing how integrated processes can improve outcomes. Additionally, we will highlight common operational challenges faced by community health centers and provide strategies to address them effectively.

*Curt Degenfelder, President, Degenfelder Health*

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

2:15 – 2:45 pm **Break**

2:45 – 4:00 pm **Operations Issues Within Health Centers.**  
This session will review synergy between financial and operational processes.

*Curt Degenfelder, President, Degenfelder Health*

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

## Day 2 • Thursday, April 3, 2025

11:00 am – 12:30 pm **Let Cash Flow: The Importance of Cash Flow Management**

This session will focus on the importance of cash flow analysis for decision-making purposes. This session will give you the skills you need to conduct liquidity and profitability ratio analysis, assess the impact that changes in costs have on financial statements and understand how these relate to a company's financial targets.

**Jeff Allen**, Partner, Forvis Mazars

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

12:30 – 12:45 am **Break**

12:45 – 2:15 pm **Using Technology to Securely Manage Information**

This session will review the state of information systems technology in health centers nationally, with specific reference to the accounting, billing, practice management, and electronic medical records systems. Additionally, you will understand how Cybersecurity plays a role in securing not only the above but the organization as well as funding strategies to review for preparation, mitigation, and recovery. You will learn how systems can be used for maximizing seamless data flow among health center departments and sites. Additional attention will be paid to the need for health centers to leverage technology to better manage information internally and externally.

**Isiah Nathaniel**, Vice President & CIO, Delaware Valley Community Health, Inc

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

2:15 – 2:45 pm **Break**

2:45 – 4:00 pm **Managing the Care of Your Patients from the Payer Perspective**

This session will provide valuable insight into the contracting world of managed care organizations and help health centers prepare and position themselves to respond effectively. We will also examine the various care models in the marketplace as payers hold providers accountable for the cost and quality of each patient's care.

**Nicole Moscatelli**, CHFP, Senior Manager Forvis Mazars

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

4:00 – 4:15 pm **Break**

4:15 – 5:30 pm **Turnover in Finance Department–  
Do you have the Playbook to Keep Things Running?**

Across many industries, turnover is a common occurrence. When this occurs in a health center finance department, it can feel like a doomsday scenario. This session will discuss key scenarios which commonly occur at health centers and provide fundamental solutions to minimize risk and exposure. Regardless of what happens in your finance department – there is a playbook to follow to keep things running and to minimize single points of failure to ensure finance operations progress.

**Aparna Mekala**, MPH, Principal, CohnReznick LLP

**Steven Schwartz**, CPA, Partner, CohnReznick, LLP

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

# REGISTRATION FORM

## 2025 TRAINING Financial Operations Management II *Innovative Financial Strategies & Operational Synergy for HC Success*

### PARTICIPANT INFORMATION

Name \_\_\_\_\_

Title \_\_\_\_\_

Email \_\_\_\_\_

Organization \_\_\_\_\_

Address \_\_\_\_\_

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

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

### COST INFORMATION\*

Early Bird Registration \$875 per person  
(if received by March 19, 2025) \$ \_\_\_\_\_

Regular Registration \$975 per person  
(if received after March 19, 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.*



NATIONAL ASSOCIATION OF  
COMMUNITY HEALTH CENTERS®

## 2025 TRAINING Financial Operations Management II *Innovative Financial Strategies & Operational Synergy for HC Success*

### 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 19, 2025**



#### FAX

Send registration form with credit card information to (301) 347-0457.  
**Fax Registration by  
March 12, 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 19, 2025.

- Cancellations received on/before March 19, 2025 will be assessed a \$100 processing fee.
- Cancellations received after March 19, 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.