

Chapter Success Plan

HFMA Regional Executive Chapter Success Plan Roles and Description

Term of Plan: One to Three years

At the Regional Executive Council meeting held in November 2018, the REC evaluated the 2017-2018 Chapter Balanced Scorecard (CBSC) and developed a new monitoring system for 2018-2019 chapter year to track individual chapter performance. The new monitoring system will include elements in Education, Networking, and Membership to be displayed as a dashboard eliminating the CBSC points system. The new elements also include a Chapter Success Plan to help chapters focus on key elements driving success.

The Chapter Success Plan is designed to help provide an overview of performance and service delivery to HFMA Members. Chapter performance in support of Davis Chapter Management System (DCMS) requirements helps provide a foundation for effective management of chapters and supports the strategic direction at both the chapter and national level.

Role

Chapter role:

- Discuss chapter performance and areas for improvement
- Include on Board Agenda, involve officers, directors, and key chapter leaders to develop, complete, and support the Chapter Success Plan
- Quarterly review to provide updates and evaluate the plan

Chapter President/President Elect:

- Complete, Submit, and Review Chapter Success Plan with Regional Executive Team
- Communicate the Chapter Success Plan to chapter officers and Board of Directors
- Review success/opportunities at Chapter Board Meetings
- Support and drive chapter focus to succeed on key elements on the Chapter Success Plan
- Update and communicate progress, obstacles, and opportunities on a regular basis
- Review with Regional Executive Team Quarterly (minimum) – complete update on template

Regional Executive Team: (to include RE 2 and RE 3)

- Communicate the opportunities and challenges in executing strategies at the chapter level
- Assess past performance and recommend ways to support continued positive performance, or identify areas for improvement
- Think strategically and encourage collaboration across chapters.
- It is critical that all three roles within the region work to establish effective communication, collaboration, and coordination to assist chapter leaders in serving member needs

Regional Executive Council:

- Review process of Chapter Success Plan
- Determine criteria for Chapter Success Plan
- Assist with structure and support for Chapter Success Plan and Dashboard Metrics
- Recommend and assist in developing Chapter Success Plan for regions/chapters

Chapter Advancement Team:

- Review/train process of Chapter Success Plan
- Communicate opportunities with Regional Executive Team on Chapter needs
- Communicate and assist Regional Executive Team on Chapter Advancement Plan opportunities
- Facilitate Chapter Success Plan for regions/chapters (upon request)

Execution:**Training:**

- Chapter Success Plan launch early spring 2018
- Webinar to introduce to Chapter President/Presidents-elect (prior to LTC)
- Train chapter leaders at LTC on completion of Chapter Success Plan (President/President-elect Tracks minimum)
- RE 2, RE 3 and Chapter Advancement Team provide one-on-one with chapters at LTC (chapter planning time and upon request)
- Dedicated time to review, evaluate, and provide feedback during Regional Planning Time at LTC and FPM

Chapter Calendar:

- First Chapter Success Plan Due 8/15/2018
- First plan reviewed/updated at FPM 2018
- Quarterly updates:
 - September 2018 (first plan)
 - December 1, 2018
 - March 1, 2019
 - June 1, 2019
- Updated Chapter Success Plan for chapter (year?) 2019-2020 submitted on or before April 1, 2019
- Plan review at LTC 2019

Guidelines for Completion:

The Chapter Success Plan is designed to help chapters focus on key areas for improvement and sustaining excellence at each individual chapter performance level. The Plan will include Chapter Status, Goals and Objectives, Method to Accomplish, Target Dates, Completion % and an area to provide status update. The menu options consist of Education (Quality, Quantity), Networking, Membership (Growth, Growth Target Markets, Satisfaction), Innovation (to align with Innovation Funding and encourage new market segments) and Other (additional elements to include Certification, Succession Planning, Cvent Implementation, Collaboration and Create your Own). The chapter will identify four elements to include Innovation.