



NATIONAL ASSOCIATION OF
Community Health Centers®



Financial Operations Management Level 3



NATIONAL ASSOCIATION OF
Community Health Centers

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

Duration of Training:

Two days

This training will focus on the following CFO Competencies:

- **Leadership (Level 4)**
- **Risk Management (Level 3)**
- **Strategic Management and Marketing (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.nasbregistry.org. (Sponsor #108392)

This program is 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 38.8 percent 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.

2024 TRAINING

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 in-person. 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.

FINANCIAL OPERATIONS MANAGEMENT TRAINING WORKSHOP LEVEL 3 (FOM 3)

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. <i>Curt Degenfelder, President, Curt Degenfelder Consulting</i> 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 alone. Instead, compliance should be viewed similarly to other organization-wide initiatives that require both leadership and management to be successful. This session will explain the role of accountability for compliance, elements of an effective strategy for maintaining compliance, and tools for managing the implementation of a compliance program. <i>Dianne Pledgie, Partner, Feldesman Leifer LLP</i> 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. <i>Curt Degenfelder, President, Curt Degenfelder Consulting</i> 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	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. <i>Dolores Di Re, Senior Manager, CohnReznick LLP</i> <i>Steven Schwartz, Partner, CohnReznick LLP</i> 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. <i>Scott Gold, Partner, FORVIS LLP</i> 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. <i>Scott Gold, Partner, FORVIS LLP</i> 1.2 CPE/ 1.0 CEU
2:00 pm - 2:15 pm	Break
2:15 pm - 4:00 pm	Where did all our funds go? – Navigating a Path Forward Post Pandemic Health center business has become increasingly challenging over the last few years as a result of COVID-19. However, prior to the pandemic, many health centers were operating in – or close to - distress. The relief provided by COVID-19 emergency one-time funding streams expired in 2023 and health centers may be finding themselves facing those same financial concerns all over again. In this session, we will discuss several signs of distress, and how to turnaround your organization to move forward and achieve sustainability and continue the mission and vision of the health center. <i>Dolores Di Re, Senior Manager, CohnReznick LLP</i> <i>Steven Schwartz, Partner, CohnReznick LLP</i> 2.0 CPE/ 1.75 CEU

REGISTRATION FORM

Financial Operations Management Training Workshop Level 3 (FOM 3)

PARTICIPANT INFORMATION

Name _____

Title _____

Email _____

Organization _____

Address _____

City, State _____ Zip _____

Phone (_____) _____ Fax (_____) _____

ATTENDANCE METHOD (Check One)

ATTEND ON-SITE

ATTEND VIRTUALLY

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.

Early Bird Registration \$875 per person
(if received by March 27, 2024)

Regular Registration \$_____ \$975 per person
(if received after March 27, 2024)

* **Registration cutoff date (Last day to register online): April 8, 2024**

PAYMENT INFORMATION

☐ Check (payable to NACHC) ☐ MasterCard ☐ Visa ☐ American Express

Total amount enclosed \$ _____

Card Number _____ Expiration 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. DO NOT mail your forms after March 21, 2024 or fax your forms after April 1, 2024.



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Hybrid

Three Ways To Register:



ELECTRONICALLY

Online registration is available. Go to 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 March 21, 2024.



FAX

Send registration form with credit card information to
(301) 347-0457. **Fax registration by April 1, 2024.**

NOTE: Registration forms will not be processed without payment.

NACHC CANCELLATION POLICY: All Cancellations must be in writing and must be received at NACHC on/before March 27, 2024.

- Cancellations received on/before **March 27, 2024** will be assessed a \$100 processing fee.
- Cancellations received after **March 27, 2024** 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 trainings@nachc.org.