

Notes from National

News and updates for HFMA's Voluntary Leaders

2002 Leadership Training Conference in Puerto Rico a hit!

This year's Leadership Training Conference (LTC), held April 21-23 in Dorado, Puerto Rico, was an enormous success. Numerous evaluations from chapter leaders who have attended multiple LTCs indicated that this year was the best compared with prior years—in some cases, going back as many as six years! The success of the conference was attributable to the nearly 500 chapter leaders, national leaders, and sponsors who came together to share best practices, tips, and resources with their peers. Joining HFMA's chapter leaders were members of the National Board of Directors, National Advisory Councils,

and Forum Advisory Councils. These national, regional, and chapter leaders worked together to discover the keys to a successful year as an HFMA volunteer.

To briefly review the happenings of this year's LTC, Ron Long, FHFMA, 2001-02 Chairman, and Phyllis Cowling, FHFMA, CPA, 2002-03 Chairman, kicked things off on the afternoon of Sunday, April 21 by thanking current and future national leaders of HFMA. Cowling then introduced John Cassis, the LTC keynote speaker, who led a poignant and often humorous discussion on building a winning team. Cassis described ways perceptions often shape peoples interactions with one another and "To Label Is to Limit," a concept that involves misjudging by appearance. To explain this concept, Cassis related the story of an elderly man who asked to be paired with him in golf. Cassis felt obligated to accept the invitation, even though he was pressed for time. As it turned out, the older man was slowed down by Cassis's play, not the other way around. No one likes to be prejudged, Cassis noted, and yet everyone subconsciously creates these labels all of the time. Cassis also suggested that members look at the HFMA acronym in a new light:

- H = humor, humility, honesty
- F = fear, failure, friction (these motivations can help members advance in their chapters - don't let them limit you)
- M = motivation, mental toughness
- A = attitude, atmosphere



John Cassis and Phyllis Cowling

Many LTC attendees commented that the positive energy and enthusiasm conveyed in the opening presentation will stay with them as they begin their year of leadership for HFMA.

Chapter leaders also had the privilege of working with current and new members of the Chapter Advancement Team (CATs) during interactive sessions on chapter finance, leadership, membership, and education.

The CAT consultants include:

- Bob Broadway, FHFMA
- "J" Evans, FHFMA
- Gail Holt, FHFMA
- Mike Johns, FHFMA, CPA
- Shelley Lake
- Libbie Loux, FHFMA
- Debby Seiradzki
- Dave Timpe, CPA
- "Woody" White, III, CPA

June 2002

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hfma
healthcare financial management association

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2002 Leadership Training Conference in Puerto Rico a hit!

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Sunday night's dinner event was highlighted by a special presentation



"J" Evans



Ron Long, Enrique Baquero and Senator Ostalaza



Sunday evening entertainment

from Enrique Baquero, a founding member of the Puerto Rico Chapter, and Margarita Ostalaza, who represents the district of San Juan in the Senate of Puerto Rico. Sen. Ostalaza presented HFMA with a government resolution recognizing HFMA's contributions to the field of health care and to celebrate the LTC in Puerto Rico. Chapter leaders also were treated to strolling violins and a mariachi band during the reception and dinner, compliments of the Puerto Rico Chapter.

The educational sessions continued on Monday, including new sessions on HFMA resources, mini-LTCs, and basic strategic planning. The afternoon was dedicated to "compelling conversations," a new concept that enables attendees to participate in discussions that are important to them, working together on questions like: "Who are sources of competition for HFMA membership?" and "How can we encourage organizations not to limit the number of individuals that they will allow to join HFMA?" Chapter planning time followed the compelling conversations.

Perhaps the highlight of LTC 2002 was the unprecedented HFMA Puerto Rico Night,

sponsored by Rums of Puerto Rico, the Puerto Rico Tourism Company, and the Puerto Rico Chapter of HFMA. Volunteers and their guests were treated to a complimentary evening of food, drinks, and great Puerto Rican music and culture in the heart of Old San Juan.


Tuesday's interactive roundtable discussions emphasized collaboration and included insights on education, membership, leadership, and newsletters. The closing session featured more interaction with the large group and the presentation of door prizes.

Congratulations to all the big winners who received the following prizes at the 2002 LTC:

\$100 Gift Certificate for Directory Services from CopyCo, Inc.

- Reggie Albert, Maine Chapter

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<http://www.hfma.org>

Chapter Services Council meets, approves guidelines

On April 20, 2002, the Chapter Services Council met in Dorado, Puerto Rico. The council currently consists of 11 Chapter Liaison Representatives (CLRs) and its Chairman, Jeff Walla, FHFMA, CPA.

The council recommended and received HFMA Board approval for six chapter life membership candidates: Charles R. Haugh, FHFMA (Minnesota Chapter), Roger H. Kishman, CHFP (North Carolina Chapter), Donald G. Pangrac, FHFMA (Northeast Ohio Chapter), Gerald C. Selke, FHFMA (Great Lakes Chapter), Michael G. Shevchik, FHFMA (Western Pennsylvania Chapter), and Don Shinnick, CHFP (Southern California Chapter).

Next, CLRs reported on the ongoing performance and administration of chapters. They agreed to follow up with all chapters that are still missing charter requirements. CLRs did not anticipate any chapters having a problem meeting the May 10 reporting deadline for all charter requirements. The council also reviewed chapter progress towards Davis Chapter Management (DCMS) award levels. The council examined activity reported to date, and was satisfied that chapters were on track to reach the existing award targets. The council will continue to examine chapter performance and DCMS award levels to ensure the awards are providing proper incentives and are recognizing chapters that achieve results consistent with the mission of HFMA.

In addition, staff provided an overview of the 2001 membership survey results. Staff will include the educational portion of the survey relating to local education and information as a 2002 Fall Presidents Meeting agenda item. Additional agenda items will include a review of the election notification form, the annual report, and region-specific topics, such as local education, surveys/evaluations, newsletters

and educational calendars. More topics will be added as subsequent discussions between CLRs and their respective regions occur.

The council also recommended and received Board approval to implement on-line registration and a Web hosting and development service. Chapters participating in the trial on-line registration program will be invited to continue to participate until January 2003. Chapter relations staff already informed 2002-03 chapter presidents about how chapters can participate in the Web hosting and development service.

The council also recommended and received Board approval for guidelines on database use. The approved guidelines are listed below:

Chapter Guidelines for Mailing List and/or Database Use

The HFMA Board of Directors may approve the establishment of chapters, by charter, to serve specific geographic areas. The rights and obligations of HFMA chapters are specified in the HFMA Chapter Charter. In addition, the HFMA Board of Directions has adopted the following guidelines to further define the document as it relates to chapter use of chapter mailing lists or member databases.

Chapters may use the chapter mailing list or member database solely to conduct the business of the chapter and HFMA National. Examples of chapter business usage include:

- Distribution of member communications as defined by the Davis Chapter Management System (newsletters, bulletins, etc.)
- Distribution of ballots for elections of chapter officers or bylaws changes
- Notification of chapter meetings to

- carry out the business of the chapter
- Notification of chapter educational events

In the instance of co-sponsored educational events with non-HFMA organizations, chapters may provide a limited or one-time use to the co-sponsoring organization. Additionally, the promotional material must include the chapter name (i.e. the XXX Chapter of HFMA) and if a logo is used, it must be the chapter logo (i.e. not to be mistaken for the HFMA National only logo).

Sponsorship

Chapters may not offer the chapter mailing list or database of members as part of any chapter sponsorship package. Rather, chapters may provide a list of pre and post registered program attendees as part of a chapter sponsorship package. This information MUST exclude email addresses and contact information of HFMA individuals who have specifically requested "no outside usage" on their HFMA member profile.

E-mail Communication

When communicating with chapter members via mass e-mail distribution, chapters are charged with protecting the privacy of chapter member e-mail addresses by ensuring that the e-mail addresses are not displayed in a manner that makes them vulnerable to being copied, pasted and misused by the recipient. Placing e-mail addresses in the bcc (blind carbon copy) section of the e-mail form fosters email address privacy. Chapters are charged to be cognizant and mindful of overuse concerning e-mail communication.

For additional information, see the Chapter Leader Resources area of HFMA's Web site, including the

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Volunteer satisfaction results are in

All current chapter presidents and Chapter Liaison Representatives (CLRs) were invited to participate in an on-line survey to gauge their satisfaction with the volunteer experience and levels of HFMA support and to provide feedback on the organization's strengths and weaknesses. Of 81 members selected for the survey, 79 percent participated—an excellent response rate!

The opinions that top volunteer leaders expressed were very positive. Respondents were asked to rate their satisfaction on a seven-point scale for six different topics. Average scores received were on the high end of the scale for each topic.

Following are the topics and their associated average score:

- Overall Experience As A Volunteer Leader: 6.3;
- Availability of Tools and Resources to Support Chapter Programming Activities: 6.0;
- Availability of Tools and Resources to Support Chapter Membership and Recruitment Activities: 5.9;
- Availability of Tools and Resources to Support Chapter Membership Communication Activities: 5.7
- Availability of Tools and Resources to Support Chapter Leader Training and Volunteer Recruitment Activities: 6.1; and
- Overall Support for Volunteers Provided by HFMA National: 6.5.

Volunteers provided comprehensive responses to the open-ended questions. These items, listed in order, are the

most likely to be mentioned as valuable resources provided by HFMA National:

- National staff, chapter relations staff, or individual staff members
- Leadership Training Conference
- HFMA Web site (Chapter leader Tools)
- Chapter Web site development or on-line registration
- Member lists, labels, or downloads
- *Notes from National*
- Reports (end of month, etc.)
- Planning Calendar and Resource Guide
- E-mail reminders
- Fall Presidents Meetings
- CLR
- Chapter Advance Team (CAT)
- Membership recruiting materials
- Conference calls
- New member electronic notification
- Davis Chapter Management System (DCMS) tracking
- Board members

When asked what HFMA National could do to further support and enhance the volunteer experience, respondents

suggested the following ideas (in order of number of times mentioned):

- More peer-to-peer conference calls, sharing ideas on a regional level
- Expanded recognition of volunteers
- Ongoing motivation incentives for volunteers
- Reductions in administrative burden/paperwork
- Assistance with educational programming
- Continued opportunities for member feedback
- Increased involvement with HFMA chapters among CFOs/executives

HFMA National will continue to look for ways to meet or exceed the expectations of its volunteers. Staff appreciates participants' feedback and suggestions. ♦



Chapter Services Councils meets, approves guidelines

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Chapter Charter and the 2002-03

Planning Calendar and Resource Guide (http://www.hfma.org/chapters/chapter_leader_resources/) or contact

Eileen Crow, director, chapter relations, at (800) 252-4362, ext. 382 or ecrow@hfma.org. ♦

ANI honors high scorers, certification support

HHFMA members who scored highest in certification testing were named during the first week of May. To be eligible for this award, it was necessary to test between May 1, 2001, and May 1, 2002. The following are award recipients:

Accounting and Finance

Sara J. McGlynn, CHFP, CPA, business coordinator, William Beaumont Hospital, Royal Oak, Michigan

Core

Sonya M. Wyatt, management accountant, CareAlliance Health Services, Charleston, South Carolina

Financial Management of Physician Practices

Diane McClellan, controller, Hampden County Physician Practices, Springfield, Massachusetts

Managed Care

Scott W. Goodin, CHFP, director of

business development and contracting, Saint Mary's Health Network, Reno, Nevada

Patient Financial Services

David J. O'Neal, Sr., CMA, general accounting manager, Carilion Health System, Roanoke, Virginia

Certified Member Get a Certified Member Award

Certified members who encourage other members to become certified are eligible to win the Certified Member award each year. Nominations are based on forms completed by newly certified members who identify a certified member who has been most instrumental in inspiring them to become certified. The member who is named most often wins this award.

This year the winner is Stephen M. Stewart, CHFP. Stephen is chief operating officer for the CBE Group,

Waterloo, Iowa. Stephen is a proctor for the Iowa Chapter and has used his laptop computer to make testing available to members not only of the Iowa Chapter, but also to members of surrounding chapters.

Winners of the high-scoring and certification recruitment awards receive:

- Air transportation to ANI in Seattle;
- Ground transportation;
- One-night's lodging at ANI;
- Recognition at ANI's certified member lunch; and
- A plaque acknowledging their achievement.

Every certified member is eligible to win the award for encouraging other members to become certified, and every member who tests between May 1, 2002 and May 1, 2003 is eligible to win the high scorer award for next year. Now is the time to begin planning to win next year's awards! ♦

Founders Merit Award Program recognizes outstanding service

The Founders Merit Award program was established in 1960 by HFMA to recognize the importance of individual members and the contributions they make to HFMA, on both the chapter and national levels. Points are accumulated according to the level of activity an individual holds, thereby encouraging members to participate in HFMA functions and to hold leadership roles within the organization. The point system allows 40 points per fiscal year per member. Four awards can be obtained based on the point system.

The *Follmer Bronze Award* is awarded to an individual who has earned 100 member points. The award

is named after William G. Follmer, who established the American Association of Hospital Accountants (AAHA) (now HFMA).

The *Reeves Silver Award* is awarded to an individual who has earned 200 member points. The award honors Robert H. Reeves, an organizing member of AAHA who was elected its president in 1956.

The third award is presented to a member who has earned 300 member points. The *Muncie Gold Award* honors Fredrick T. Muncie, who was an organizing member of the AAHA and the first president of the association (1947-49).

A fourth award, the *Founders Medal of Honor*, was added in 1986 and is conferred by nomination of the member's Chapter Board of Directors. This award recognizes individuals who have been involved in the association for at least three years after earning the Muncie Gold Award, have provided significant service at the chapter and/or national level in at least two of those years, and remain members in good standing.

Chapter Relations will send program materials to all chapter Founders Award chairpersons in mid-June. After

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2002 supply-chain survey results issued

HHFMA and McKesson Information Solutions, Inc. recently issued a joint report highlighting current practices, opportunities, and issues within supply-chain management in health care. The report combines industry perspectives with results from over 600 respondents. The survey research was conducted independently by HFMA.

Both executives and supply-chain leaders agree that there are significant future opportunities for improvement in this area even with recent improvements in standardization, group purchasing organization (GPO) contracting, and central supply processes. Filled with insight into actual supply-chain processes, this report is designed to help healthcare leaders learn from the successes of their peers.

HFMA President and CEO Richard L. Clarke, FHFMA, says, "Sharing best practices in cost management will

not only improve a hospital or health system's bottom line, but also will benefit the industry as a whole."

Key themes discussed in the report include savings in supply-chain management through: stricter, value-based standardization processes; informed purchasing and inventory management; strategic supplier partnerships; and, most importantly, an organization-level view of supply-chain management. The survey found that:

- 26 percent of hospital purchases are non-standard or off contract.
- 27 percent of hospital inventory is unofficial or not counted.
- 66 percent of respondents track vendor compliance.
- 54 percent of materials management purchases and 35 percent of surgical purchases are made using the Internet.

"Clearly, healthcare organizations still have many opportunities to improve upon their resource management efforts," said John Nunnally, president of the financial and administrative solutions division at McKesson Information Solutions, Inc. "We are excited to work with HFMA to help healthcare organizations pinpoint areas where resource-management efficiency and productivity can be maximized to make a positive impact on their bottom line. In turn, these dollars saved can be used to improve patient care."

This report marks an exciting phase of an ongoing effort aimed at identifying opportunities to optimize the total management of labor, supplies, equipment and facilities. Additional information is available at: http://www.hfma.org/FeaturedTopic/resource_management.htm. ♦

Founders Merit Award Program recognizes outstanding service

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receiving the materials, the chapter's Founders Award chairperson should report points earned by members during the prior fiscal year (2001-02) to HFMA National by August 10, 2002. HFMA National will process the chapter's file and produce an award list, which will be sent to the chapter Founders Award chairperson. The chapter president then will approve the list, and awards will be ordered.

It is important to remember that although HFMA National and the chapters track these points, each member is responsible for reporting points earned to the chapter's Founders Award chairperson. Members should verify their points with their

Founders Award chairperson and make sure corrections are made if necessary. In mid-June, members will be able to view their updated detail points for the 2001-02 Founders year on the HFMA National Web site by going to http://www.hfma.org/dual_login.cfm.

Merit Award Series booklet that describes the program and how points can be earned. The booklet is available on the HFMA Web site under "publications" in the Chapter Leader Resources area: http://www.hfma.org/chapters/chapter_leader_resources/index.htm. For more

information about the Founders Award program, to receive a paper copy of the booklet, or to obtain a copy of the Founders PowerPoint presentation, contact Shirley Heavlin, HFMA chapter relations specialist at sheavlin@hfma.org or (800) 252-4362, ext. 347. Members also can receive more

information about the Founders Award program from their chapter's Founders Award chairperson. ♦

Recognizing the Leader in You

Helpful tools and resources available from HFMA include a PowerPoint presentation and Founders Award

Disclosure update

HHFMA's Principles and Practices (P&P) Board actively monitors accounting and financial reporting issues, works to ensure that standards accommodate the healthcare field's distinctive characteristics, and provides guidance to healthcare organizations where existing standards are unclear. The following are just some of the Board's activities regarding disclosure issues over the past fiscal year.

Disclosure Guidance

The disclosure task force of the P&P Board is working to develop additional guidance for members on strong financial and operational disclosure practices—efforts that have become particularly pertinent in the wake of the accounting debacles of the Allegheny Health, Education, and Research Foundation and Enron. The task force will address the topic in a series of articles in coming months.

Members of the P&P Board also have been participating in the Municipal Council, which was initiated by the Municipal Securities Rulemaking Board (MSRB). The council is developing a long-range plan for an "ideal" disclosure system. A useful resource for the council has been HFMA's P&P Board Statement No. 18, "Public Disclosure of Financial and Operating Information by Healthcare Providers." (See "The Disclosure Dilemma" in the May 2001 *Healthcare Financial Management* for more background on the disclosure issue.)

Formal Comments on Business Combinations

The P&P Board has prepared formal comments to the Financial Accounting Standards Board (FASB) regarding the exposure draft, *Business Combinations and Intangible Assets*, which

deals with the business combinations of for-profit entities. A member of the P&P Board is participating in the FASB's Working Group on Combinations of Not-for-Profit Organizations, which is developing standards that would eliminate the pooling-of-interests method for not-for-profit business combinations. This change is a big concern for healthcare providers, because in all combinations an "acquirer" will need to be declared; however, many not-for-profit combinations are a true merger of equals. The P&P Board will continue to submit additional information to the FASB to highlight areas that should be considered during its deliberations.

Corporate Compliance Checklists

The P&P Board's corporate compliance work group has been operating in conjunction with the advisory council of HFMA's Compliance Officers Forum to develop checklists to aid members in various provider settings plan their with compliance activities. To view the checklists, visit HFMA's Resource Center at <http://www.hfma.org/resource> and select "focus areas," and then "Medicare payment." Checklists are now available for nursing facilities, home health agencies, third-party billing companies, Medicare+Choice Organizations, laboratories, and small group physician practices. The current compliance checklist for hospitals will be updated and released at HFMA's 2002 Annual National Institute.

Third-Party Revenues and Receivables Vigilance

The P&P Board continuously monitors industry developments regarding third-party revenues and related receivables. The American Institute of Certified

Public Accountants has issued a statement of position (SOP) on the auditing of healthcare third-party revenues and related receivables. This issue has been somewhat "quiet" lately and the P&P Board is monitoring for any new developments. It will address issues from this SOP when necessary.

P&P Board Statements On Line

Over the past year, HFMA has posted all of the current P&P Board statements on line, for convenient access. These statements, which provide important accounting and financial reporting guidance on topics that have unique considerations for healthcare entities, are provided free to everyone as a public service of HFMA, and are available by selecting "Principles and Practices Board" in the Resource Center.

Chapters Need Disclosure Awareness

HFMA's recent research on member preferences and behavior patterns suggests ambivalence may be hindering action on establishing effective disclosure practices. Despite survey results that show high member interest in disclosure issues, HFMA's national educational programs on these topics typically experience low attendance. A recent HFMA survey on disclosure issues also garnered an extremely low response rate.

HFMA is concerned that these signs may indicate that members do not fully appreciate the potential capital access benefits that often follow improvements in disclosure practices.

To help members recognize these benefits, HFMA encourages chapter leaders to use the following tactics to stimulate member interest:

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Obtaining CPE credit for educational programs

HHFMA National is an approved sponsor of continuing professional education (CPE) credit through the National Association of State Boards of Accountancy (NASBA), and CPAs who participate in qualified educational programs offered by HFMA National receive CPE credit. Chapters that wish to offer CPE credit to CPAs who participate in chapter educational programs are responsible for receiving approval to do so and are accountable for complying with all standards. Chapters that do not have approval to offer CPE credit and desire to obtain it should contact their state board of accountancy to determine the state-specific requirements.

If chapters co-sponsor an educational program, state boards of accountancy for each chapter must be consulted in advance to determine each state's specific requirements. A chapter can advertise CPE credit that has been approved for a program, but may not advertise pending CPE credit. The state board of accountancy can provide the appropriate language to communicate that CPE credit is approved.

When planning a continuing education program for which CPE credit is desired, chapters should review state board of accountancy requirements well in advance to ensure that all necessary actions are taken in a timely manner. The following guidelines are

representative but not necessarily inclusive of typical requirements for CPE eligibility:

- The program must maintain and/or improve a participant's professional competence of relevant technical and/or non-technical skills.
- Stated program objectives should specify the level of knowledge participants should attain or the level of competence (skills and abilities) they should achieve upon completing the program.
- The program must clearly identify prerequisite education, experience, and advance preparation and specify the target audience.
- The program materials, activities, and delivery method must be current, technically accurate and effectively designed. The program must be developed by people with expertise in the subject matter and in instructional design. The sponsor is accountable for reviewing the program and ensuring that the content and all materials used by faculty (overheads, handouts, etc.) remain timely and accurate. Program content and materials must be reviewed periodically and objectively by a content specialist independent of the program developer to ensure the program remains accurate and relevant.
- Program sponsors must ensure that faculty has appropriate content and presentation experience. Program sponsors and faculty also should ensure appropriate time is allocated to program segments and the planned room set-up and facilities are conducive to learning for the size of the group.
- All educational programs must provide a means to elicit evaluative feedback from participants and instructors about the program quality. Program sponsors should periodically review these results as well as share them with the faculty and program developers to help identify ways to increase subsequent program effectiveness.
- Program sponsors must provide participants with documentation of program participation and retain required documentation for a minimum period of five years.

Specific guidelines and requirements, including the process of awarding CPE certificates, can be obtained from the state boards of accountancy. For information on how to contact your state board of accountancy, visit NASBA's Web site at www.nasba.org or contact Elaine Mrzlak, HFMA instructional designer, at (800) 252-HFMA, ext. 336 or emrzlak@hfma.org. ♦

Disclosure update

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- Invest in promotion of educational events that address accounting and disclosure issues.
- Ensure that event promotions emphasize ways the program's content is important and relevant to chapter members.
- Allocate time during the event

for discussion of best practices and concerns, perhaps even including practical problem-solving sessions.

- Communicate HFMA's principles regarding sound reporting practices during chapter meetings and in chapter newsletters.
- Direct members to HFMA's on-line

resources at <http://www.hfma.org/resource/disclosure.htm>

To help chapter leaders develop appropriate resources for members, HFMA is preparing an organizational outline of disclosure responsibilities. This resource will be available in June on-line at <http://www.hfma.org/resource/disclosure.htm>. ♦

2002 Leadership Training Conference in Puerto Rico a hit!

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- Matt Levsen, Show-Me of Missouri Chapter
- Terry Lutz, Great Lakes Chapter
- Dan Musner, Great Lakes Chapter
- Lou Panza, Western Pennsylvania Chapter

\$100 Gift Certificate from Marketnet

- David Epstein, San Diego Imperial Chapter
- George Flemming, Arkansas Chapter
- Cathy Zito, Maryland Chapter
- Sue Stanley, Connecticut Chapter
- Sharon Dougherty, Virginia Chapter

Airfare and Registration to ANI 2002

- Steve McCafferty, New Hampshire-Vermont Chapter



LTC educational session

Digital Camera Compliments of the LTC Sponsors

- Parmod Garg, Nevada Chapter

Dave Canfield, FHFMA, 2002-03 Chairman-elect, ended the conference by sending off the 2002 leaders

with an enthusiastic farewell, complete with a photo recap of the week's events.

Next year's LTC already is in the works. Mark your calendars now for LTC 2003, April

6-8, at the Renaissance Chicago Hotel in Chicago, Illinois. For more information about the Leadership Training Conference, contact Anne Paul, HFMA chapter relations specialist, at chapter@hfma.org or visit <http://www.hfma.org/ltc>. ♦



Monday evening festivities

Thanks from Puerto Rico

We, the members of the Puerto Rico Chapter, feel very proud that Puerto Rico was chosen as the site for HFMA's 2002 Leadership Training Conference. We're very thankful for the program's success, which has been evidenced by the hundreds of communications we have received from so

many good friends at HFMA expressing their congratulations and gratitude.

The Puerto Rico Chapter is most grateful for all of the support provided by HFMA National, the Puerto Rico Tourism Company, Rums of Puerto Rico and, most especially, Enrique Baquero, our chapter-fellow, who

generously provided us with all necessary resources to make this year's activity a very fruitful one.

To all of our friends from HFMA, we want to convey our sincere appreciation for your kind expressions of affection and gratitude. We heartily invite you to visit Puerto Rico again. ♦

Chapter Membership Report, as of April 30, 2002

Chapters that demonstrate excellence in membership growth are recognized with the Awards of Excellence for Membership Growth. This award is based upon the percentage of net membership growth

at the end of the DCMS year (April 30, 2002). To earn the 2001-02 Award of Excellence, chapters must exceed 0.0% for bronze, 1.93% for silver, and 4.54% for gold. ♦

Region and Chapter	May 1, 2001	April 30, 2002	Percent Change
Region 1			
Connecticut	406	387	-4.68%
Maine	255	271	6.27%
Massachusetts	1,125	1,037	-7.82%
New Hampshire-Vermont	346	354	2.31%
Rhode Island	87	91	4.60%
Region 2			
Central New York	219	197	-10.05%
Hudson Valley	204	183	-10.29%
Metropolitan New York	1,482	1,428	-3.64%
Northeastern New York	149	162	8.72%
Puerto Rico	76	71	-6.58%
Rochester Regional	264	259	-1.89%
Western New York	220	214	-2.73%
Region 3			
Appalachian/Central PA	277	291	5.05%
Metropolitan Philadelphia	959	937	-2.29%
New Jersey	1,013	975	-3.75%
Northeastern Pennsylvania	152	158	3.95%
Western Pennsylvania	464	450	-3.02%
Region 4			
Kentucky	446	486	8.97%
Maryland	651	626	-3.84%
North Carolina	853	871	2.11%
Virginia	596	632	6.04%
Washington Metropolitan	249	228	-8.43%
West Virginia	246	236	-4.07%
Region 5			
Alabama	587	615	4.77%
Florida	1,206	1,209	0.25%
Georgia	1,230	1,230	0.00%
South Carolina	444	442	-0.45%
Tennessee	927	951	2.59%
Region 6			
Central Ohio	266	267	0.38%
Eastern Michigan	680	651	-4.26%
Great Lakes	232	237	2.16%
Northeast Ohio	569	587	3.16%
Northwest Ohio	167	161	-3.59%
Southwestern Ohio	287	270	-5.92%
Western Michigan	266	284	6.77%

Region and Chapter	May 1, 2001	April 30, 2002	Percent Change
Region 7			
First Illinois	1,083	1,111	2.59%
Indiana Pressler Memorial	730	740	1.37%
McMahon-Illini	298	303	1.68%
Southern Illinois	172	175	1.74%
Wisconsin	646	644	-0.31%
Region 8			
Greater St. Louis	382	363	-4.97%
Heart of America	258	271	5.04%
Iowa	320	338	5.62%
Minnesota	542	542	0.00%
Nebraska	241	241	0.00%
North Dakota	150	147	-2.00%
Show-Me of Missouri	208	213	2.40%
South Dakota	137	147	7.30%
Sunflower (Kansas)	232	252	8.62%
Region 9			
Arkansas	236	244	3.39%
Lone Star	790	838	6.08%
Louisiana	461	482	4.56%
Mississippi	326	347	6.44%
Oklahoma	344	353	2.62%
South Texas	287	316	10.10%
Texas Gulf Coast	607	663	9.23%
Region 10			
Arizona	419	424	1.19%
Colorado	438	455	3.88%
Idaho	130	140	7.69%
Montana	190	196	3.16%
New Mexico	143	142	-0.70%
Utah	146	148	1.37%
Wyoming	63	61	-3.17%
Region 11			
Hawaii	183	176	-3.83%
Nevada	117	136	16.24%
Northern California	1,088	1,041	-4.32%
Oregon	388	398	2.58%
San Diego Imperial	171	176	2.92%
Southern California	948	993	4.75%
Washington-Alaska	684	666	-2.63%

Chapter Educational Hours Report, as of April 30, 2002

The Awards of Excellence for Education and the C. Henry Hottum Award for Educational Performance Improvement provide incentives and recognition of chapter activities. The 2001-02 Award of Excellence cut points,

which are based on registrant hours per member, are 10.79 for bronze, 13.23 for silver, and 18.11 for gold. The 2001-02 Hottum Award cut point is a 3.6% increase over last year's total registrant hours. ♦

Region and Chapter:	Registrant Hours per Member	Current YTD	Last Yr. YTD	Last Yr. Total	Region and Chapter:	Registrant Hours per Member	Current YTD	Last Yr. YTD	Last Yr. Total
Region 1					Region 7				
Connecticut	3.96	1,606.73	1,644.50	1,644.50	First Illinois	4.77	5,166.87	4,091.37	4,091.37
Maine	14.77	3,766.54	2,802.00	2,802.00	Indiana Pressler Memorial	9.69	7,071.38	6,887.59	6,887.59
Massachusetts	6.51	7,327.23	7,587.68	7,587.68	McMahon-Illini	9.75	2,906.46	2,824.75	2,824.75
New Hampshire-Vermont	14.11	4,880.53	5,291.92	5,291.92	Southern Illinois	13.93	2,396.02	2,623.49	2,623.49
Rhode Island	18.92	1,646.25	1,629.50	1,629.50	Wisconsin	8.64	5,584.31	5,839.21	5,839.21
Region 2					Region 8				
Central New York	11.37	2,490.00	2,233.50	2,233.50	Greater St. Louis	5.76	2,201.52	5,778.59	5,778.59
Hudson Valley	7.66	1,562.00	2,183.67	2,183.67	Heart of America	9.01	2,325.29	2,445.75	2,445.75
Metropolitan New York	8.03	11,894.12	14,885.75	14,885.75	Iowa	19.69	6,301.79	7,045.25	7,045.25
Northeastern New York	7.84	1,167.54	1,004.67	1,004.67	Minnesota	5.44	2,949.29	1,855.25	1,855.25
Puerto Rico	17.19	1,306.52	2,660.50	2,660.50	Nebraska	13.68	3,296.23	7,580.34	7,580.34
Rochester Regional	12.67	3,343.72	3,211.50	3,211.50	North Dakota	18.89	2,833.27	3,943.00	3,943.00
Western New York	9.25	2,034.47	4,239.75	4,239.75	Show-Me of Missouri	14.44	3,003.25	1,493.00	1,493.00
Region 3					Region 9				
Appalachian/Central PA	20.36	5,640.96	6,007.90	6,007.90	Arkansas	19.90	4,696.70	6,241.75	6,241.75
Metropolitan Philadelphia	8.11	7,774.74	8,544.04	8,544.04	Lone Star	6.78	5,359.60	3,392.92	3,392.92
New Jersey	9.96	10,093.07	7,516.25	7,516.25	Louisiana	27.66	12,750.02	12,480.46	12,480.46
Northeastern Pennsylvania	8.48	1,289.47	1,888.75	1,888.75	Mississippi	17.33	5,648.32	5,035.25	5,035.25
Western Pennsylvania	8.23	3,818.50	2,277.75	2,277.75	Oklahoma	10.63	3,658.07	3,809.75	3,809.75
Region 4					Region 10				
Kentucky	12.34	5,502.32	5,524.25	5,524.25	Arizona	8.94	3,744.75	3,756.00	3,756.00
Maryland	8.31	5,410.08	6,063.70	6,063.70	Colorado	9.71	4,252.08	4,677.68	4,677.68
North Carolina	20.08	17,129.07	25,532.80	25,532.80	Idaho	13.68	1,778.54	1,941.00	1,941.00
Virginia	13.65	8,133.76	8,541.00	8,541.00	Montana	22.14	4,205.98	4,865.50	4,865.50
Washington Metropolitan	2.97	738.94	1,020.25	1,020.25	New Mexico	6.51	930.50	570.92	570.92
West Virginia	22.62	5,564.80	4,936.04	4,936.04	Utah	10.00	1,460.00	1,520.50	1,520.50
Region 5					Region 11				
Alabama	24.89	14,611.79	16,173.09	16,173.09	Hawaii	16.71	3,057.23	3,626.17	3,626.17
Florida	16.23	19,577.75	20,339.19	20,339.19	Nevada	20.63	2,414.00	2,340.50	2,340.50
Georgia	24.44	30,055.20	24,452.25	24,452.25	Northern California	7.29	7,930.55	9,616.25	9,616.25
South Carolina	16.17	7,180.01	10,707.17	10,707.17	Oregon	17.47	6,780.30	5,479.50	5,479.50
Tennessee	15.93	14,768.86	19,735.62	19,735.62	San Diego Imperial	13.22	2,260.51	1,342.75	1,342.75
Region 6					Region 11 (continued)				
Central Ohio	8.76	2,329.71	3,064.00	3,064.00	Southern California	17.53	16,622.80	13,737.34	13,737.34
Eastern Michigan	19.28	13,109.20	13,875.00	13,875.00	Washington-Alaska	13.22	9,045.20	9,434.09	9,434.09
Great Lakes	5.03	1,167.48	1,816.00	1,816.00					
Northeast Ohio	5.50	3,131.56	3,335.50	3,335.50					
Northwest Ohio	3.93	656.02	981.84	981.84					
Southwestern Ohio	7.04	2,019.99	1,183.67	1,183.67					
Western Michigan	7.74	2,058.75	1,299.00	1,299.00					

Calendar

Charter Due Dates

- June 1—Strategic Plan and Operating Budget
- June 20—Annual Report
- July 15—IRS 990 Reporting

Note: Annual Elections Notification, Verification of Chapter Board Meetings, and all educational event and member communication reports for the 2001-02 Davis Chapter Management System (DCMS) Year were due May 10.

HFMA Conferences and Clusters

- May 20-23—Baltimore Cluster, Wyndham Baltimore Inner Harbor, Baltimore, MD
- July 24-26—US/UK Exchange, Embassy Suites Resort Lake Tahoe, South Lake Tahoe, CA
- September 12-13—Region I Conference, Providence Marriott, Providence, RI
- October 6-8—Revenue Cycle Conference, Caesars Palace, Las Vegas, NV

Please visit www.hfma.org for more information on these and other educational offerings.

2002 Annual National Institute

- June 16-20—Sheraton Seattle Hotel and Towers, Seattle, WA
- June 17—Annual Chapter

Presidents Dinner Meeting, followed by Awards Presentation and Dessert

2003 Leadership Training Conference

- April 6-8—Renaissance Chicago Hotel, Chicago, Illinois

2002 Fall Presidents Meetings and Key Contacts

Region 1

John R. McNeff, Jr., CPA
Ph: (203) 688-2069
September 13-14, 2002
Providence Marriot
Providence, RI

Region 2

Melvin M. Dyster, FHFMA
Ph: (716) 887-4960
September 23-24, 2002
Buffalo Niagara Marriott
Amherst, NY

Region 3

Robert S. Bray
Ph: (570) 552-6165
September 8-10, 2002
Hershey, PA

Region 4

Bunnie B. Overby
Ph: (336) 538-8455
September 13-14, 2002
Seelbach Hilton
Louisville, KY

Region 5

Scott J. Davis, FHFMA, CPA
Ph: (954) 987-2020, ext. 5105
September 15-22, 2002
Adventure of the Sea-Celebrity Galaxy
Southern Caribbean Cruise
San Juan, PR

Region 6

Diane S. Justewicz, FHFMA
August 18-19, 2002
Radisson Riverfront Hotel
Windsor, Canada

Region 7

J. Alan Nerone, CPA
Ph: (309) 691-1064
September 22-23, 2002
Las Vegas, NV

Region 8

Chris W. Champ
(701) 239-8620
September 15-16, 2002
Sanibel Harbour Resort & Spa
Ft. Meyers, FL

Region 9

Richard D. Wagner, FHFMA, CPA
(918) 523-9390
September 21-23, 2002
Westin Francis Marion Hotel
Charleston, SC

Regions 10 & 11

Cheryl A. Harmon, FHFMA
Ph: (775) 770-3565
August 18-19, 2002
Maui, HI ♦

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