

Program Description

The CFO is one of the most important positions in a hospice. The CFO has perhaps the biggest paddle in the hospice canoe regarding direction, with the exception of the CEO. Why? Because the CFO is armed with some of the most persuasive data in the organization, the quantified facts of the business...data! The underlying truth with all businesses is that **the economic model MUST work**. To be effective, the CFO must accurately quantify the current state of the organization, interpret the situation with predictive insight of the future, formulate strategies, and influence others to execute positive action. The EVIDENCE of an effective CFO is in the numbers! An effective CFO can help a hospice be radically successful. A poor CFO can help a hospice out of business.

The purpose of the program is to instill the financial leadership mindset, the technical skills, and the deep knowledge of the numbers to be an **effective** hospice CFO into individuals that desire to be better at the position. To achieve this end, participants will undergo a sequence of testing, evaluation, training, and retesting until the subject matter is mastered. The program was designed by Andrew based on his experience as the CFO of numerous hospices and the insight gained from working with literally hundreds of hospices. The program is an intense 2½ days in duration. Participants are removed from their respective environments by coming to Hendersonville or an alternative site. Absolute FOCUS is given to the subject matter that is critical to being an effective CFO. A single comprehensive test is given. Once a question of the exam is successfully completed, it is no longer necessary to be retested on the question on days 2 or 3. It is desired that all participants pass all sections and successfully answer every question.

Participants will learn:

- The Mindset of an Effective CFO
- The Measures and Metrics of Hospice Operations
- Scenario Analysis
- Best Practices and About MVI tools

The difficulty of the program is relative to the talents, preparation, and skills of the individual. Successful participants should feel EMPOWERED and CONFIDENT in what they KNOW. This is a difficult program and upon completion, participants should have a great sense of achievement.

The cost of the 2½ day program is \$2,250 per participant. MVI offers a \$250 discount for participants that register 1 month prior to a program. This helps us with planning as we try to provide high-quality events with tremendous attention to the details of the experience.

CEOs, other leadership and financial positions are also encouraged to attend. Go to www.multiviewinc.com and click on the **Tough Training Programs** link to sign up. **NASBA approved: 21 CPE hours.**

CFO Program Details

Contact Information

For questions, concerns or comments email us at:
toughtraining@multiviewinc.com.

Scheduled Dates

June 5-7, 2017

The program begins at 8:16am each day and ends at approximately 5:30pm on days 1 and 2. Day 3 begins at 8:16am and ends approximately at 12:00. Testing resumes after 12:00 (for those who have not passed the exam) until 1:30.

Participants will have 6 opportunities to pass the exam. Approximate testing period times will be as follows:

| Test Period | Day | Begin Time | End Time |
|-------------|-------|------------|----------|
| 1 | Day 1 | 8:30am | 9:15am |
| 2 | Day 1 | 4:00pm | 5:30pm |
| 3 | Day 2 | 8:30am | 9:30am |
| 4 | Day 2 | 4:00pm | 5:30pm |
| 5 | Day 3 | 8:30am | 9:00am |
| 6 | Day 3 | 12:00pm | 1:30pm |

Training Location

MVI Executive Retreat & Conference Center,
2362 Big Hungry Road, Flat Rock, North Carolina 28731 Phone: (No Phone)

- Take **I-26 to Exit 53**
- Turn onto **Upward Road** towards Waffle House away from the McDonalds
- Go 1 mile and turn **Right onto Big Hungry**
- Go ½ mile and turn **Left to stay on Big Hungry**
- Go ¼ mile and turn **Right to stay on Big Hungry**
- Go approximately 3 miles(you will cross a bridge and see water falls, go up the mountain)
- Turn **Right at the Entrance** of the Center (rock columns and large black gate)

- *Park around the Center sequentially according to the signs*
- *Welcome!*

Lodging and Transportation

The CFO Program is held at the MVI Executive Retreat & Conference Center.

MVI Executive Retreat & Conference Center

If the program is held at the MVI Executive Retreat & Conference Center, attendees normally stay at the Mountain Lodge or Mountain Inn & Suites off of I-26 Exit 53. These accommodations are especially prepared for MVI guests and are located near the center. The Mountain Lodge is a bit more up-scale than the Inn. Special rates are given when you mention that you are with MVI. Both places are located next to each other.

Mountain Lodge: (828) 693-9910 – 42 McMurry Road, Flat Rock NC 28731

Mountain Inn & Suites: (828) 692-7772 – 755 Upward Road, Flat Rock 28731

We have two airports in our area. They are:

- ❖ Asheville Regional Airport; Asheville, NC
- ❖ Greenville/Spartanburg Airport; Greenville, SC

A rental car is necessary due to the distances from either airport to the hotel and also from the hotel to the conference center.

Pre-Test

Pre-Tests will be emailed approximately one month prior to the program upon receipt of payment. This exam closely resembles the actual test and will help you prepare for the program. **IT IS VERY IMPORTANT TO REVIEW THIS DOCUMENT!!!!**

What to Wear? What to Bring?

Wear comfortable clothes! This is about knowledge and not fashion! Wear comfortable **LAYERED** clothes since it is difficult to make the room temperature right for everyone. We want you to be in a great state of mind and relaxed.

Bring a calculator.

If you have a laptop computer, you might want to bring it too. As certain tools are discussed, you can access them. Having a laptop is nice, but it is not

necessary...but in the modern world why not? You might also consider bringing the management statements you actually use to manage your hospice. You may want to reference them or discuss them.

Bring an energized and enthusiastic spirit!

This is a rewarding adventure. You will learn a great deal from this experience!

Recognition

Participants that successfully complete the program will receive an MVI certificate, which will be mailed after the program. There will be cause to celebrate completion of the program!

Worried about Passing?

Everyone will be given the OPPORTUNITY to pass. This course has real expectations and high standards. The difficulty will be relative to the person. If a person fails the first time through the program, the individual will be allowed to participate again at a reduced rate of \$500. The goal is that everyone successfully completes the program.

The CFO Program is Excellent for CEO and Leadership Team Members

The CFO Program is an excellent program for senior leadership, especially CEOs to learn hospice financial operations on a deep level. With this said, one of the comments I receive from some CFOs is that “our CEO needs to hear this Andrew.” Now this may simply be “weenie-ism” in some cases. However, I can’t help but think it’s a good idea to get the CEO and CFO on the same page financially since so much is at stake in the modern hospice era. CEOs and members of the leadership team can attend the program for at a discounted rate of \$750. The information provided is equally important to CEOs, the “real” or “ultimate” financial leader as the CEO holds the purse strings!

Repeating the Program Periodically is Encouraged

The CFO Program is updated before each event. The CFO Program is approved by NASBA for 21 CPE hours. Repeat attendees DO NOT HAVE TO TAKE THE TEST! The cost to repeat the program is \$750.

Program Registration & Cancellation Policy

To register for the program, please go to www.multiviewinc.com and click on the **Tough Training Programs**.

An invoice will be sent to you directly. Please remit payment upon receiving the invoice. This will hold your spot. We will be accommodating in the event of cancellation. Cancellations receive a refund less a \$200 administrative fee.

Program Outline

Note: This program outline is subject to change as new material is added or modified.

- Emailed Pre-Exam – This exam closely resembles the actual test and will help you prepare for the program. It is especially beneficial if participants have a working understanding of Excel and F9. It is expected that participants understand accounting. We will work with participants that are deficient in any area.
- Bring current management reports. These will be evaluated and discussed if desired.

TESTING: A single comprehensive test is given. Once a section is successfully completed, it is no longer necessary to take the same section on days 2 or 3. It is desired that all participants pass all sections and successfully answer every question.

Table of Contents

| | |
|--------------------------------|--|
| Day 1 – The Day of Shock | |
| Introductions | |
| Expectation Management | |
| Testing | |
| What is Your Role? | |
| Exercise: The Five Lists | |

- What are you going to do when you get back to your hospice?
- The Other List.....
- Bought-In and Sold-Out?.....
- Consider the parable of the peril and the field... ..
- In My Simple Mind - Andrew's Opinion on Leadership Effectiveness
- Professionals versus Amateurs
- The Learner & Teacher Paradigm
- Confidence
- Find Your Own Confident Voice
- Ideas about Accounting.....
- Permission to Step Outside.....
- *No Weenies Allowed!!!!
- No Weenie CFOs Allowed!!!!.....
- BUT We're Different!!! The Big Weenie CFO Excuse!
- The State of Hospice.....
- Warning Clouds.....
- The Influence of the Position
- Hippocrates 4 Temperaments.....
- Why do most CFOs not use the power of the position effectively?
- How influential can a CFO become?
- Why strive continually to become a "Top" CFO?
- Why is it important for a CFO to Master Excel and F9?
- Characteristics of a Great CFO
- The Image of the Not-For-Profit.....
- The Image of the For-Profit Hospice
- Learn to Ignore Community Support.....
- Operational Profitability
- Magic Dust?
- What Am I Responsible for?.....
- Communicating the Need to Balance the Ideas of Profit and Purpose
- The CFO Idea Salesperson
- The Economic Model Must Work!
- Gaining Confidence Through Knowing Your Numbers.....
- Getting Comfortable with Measurements and Quantification
- The Role of Financial Reserves in a Hospice.....
- Reasons to Be Profitable and Build Reserves
- The Medicare Threat
- What Will Happen as Medicare Cuts Occur?.....
- The MedPAC Recommendation (the U-Shaped Curve)*
- *Hospice Detox.....
- *Working with your CFO.....
- Definitions & Terms
- The Use of Net Patient Revenue (NPR)
- An Example of How to Compute Net Patient Revenue Measurement
- Classifying Costs.....

- Classifications in the MVI Benchmarking System
- Addressing the #1 Problem in Hospice
- Facing the Evil “P” Words.....
- Models.....
- 14!.....
- Construction of Costs and Models
- The One Page Financial Model Report.....
- The Caseload Model.....
- Computed Caseloads
- Operational Profitability
- Magic Dust?
- *Where Do You Get Your Reports and Numbers?
- Accounting Problems – “Lumping” Nursing Costs
- Why should a CFO know key measurements by memory?
- *Why should a CEO know key measurements by memory?
- *Why should a Clinical Leader know key measurements by memory?
- Understanding Hospice Measurements, Key Concepts & Definitions
- Lower Costs Are Not Always Better
- The War of Single Percentage Points
- How much “positive residual” or profit should your hospice have?
- You Can’t Operate Your Hospice Based on Averages
- Understanding Costs.....
- Hospice Homecare
- Indirect Costs.....
- Inpatient Units.....
- Benefits.....
- Clinical Productivity
- Clinical Productivity Standards.....
- The High Acuity Myth.....
- The High Caseload Myth
- Caseload Expectations
- Visit Durations.....
- Understanding the Impact of Longer/Shorter Visits
- Communicating Productivity Expectations to Clinical Staff – Visits Per Week.....
- Visits Per Active Day
- Productivity Based on Payroll Dollars
- Caseload Measurement would be Superior to Visit Productivity Measurements
- Is your Hospice Coddling Staff?
- Perspective on Hospice Reimbursement.....
- How much “positive residual” or profit should your hospice have?
- The Illusion of Profitability
- What is the Model?.....
- The Primary Areas of Design Work
- The Three Primary Categories of Cost.....

- The Use of Net Patient Revenue (NPR).....
 - An Example of How to Compute Net Patient Revenue Measurement
- Why Should a Hospice Create a Model?.....
 - The Benefits of Creating and Using Models
 - Breaking Down the Barriers
 - Financial Disdain for the Numbers, especially Money
 - Overcoming the “Great Dilemma”
 - Avoid being Dependent upon Community Support
- Examples of Model Designs
- Overall Model.....
- An Example of a Comprehensive One Page Model Report
- Gaining Perspective and the Reality Check
- How can you get your benchmarking results?
- Becoming Familiar with the Tools.....
 - The Decision Dashboard
 - The Model Teaching Tool
- Name Your Model
- No Budgets!.....
 - Ideas for Branding/Naming your Model
- Name Your Model
- The Design of Care
- The Key to Satisfaction
- Design of the Team.....
 - Different types of Models within a Hospice
 - The Importance of Finding the “Optimal” Number.....
- Visit Design
- Model Your BEST!.....
- Identify Your BEST Based on the Three Things!
- Avoiding “Death by Committee”
- Who Are Your Top Clinicians?.....
- Clinical Productivity - Establishing the Expected Number of Weekly Visits
- Understanding the Impact of Longer/Shorter Visits
- Minimum Expectations.....
- Important Questions
- Product Design.....
 - What is a product?
 - Examples of Products.....
 - The Value of Well-Designed Products
 - The Importance of Caregiver Education
- Example Hospice Menu
- Learning to Live Within a Model
- Setting an Example.....
- Speaking the Model Language
- Promptly Address Behavior that Deviates from the Model Ideas
- When You Blow It, Admit It.....

- Continually Refining/Changing the Model
- Best Ideas Win.....
- Reports and Formats of Financial Statements
- What Financial Statements Should A Hospice Use?
- Principles of Human Behavior that Apply to Indicator Reporting.....
- Simplify Reporting.....
- Model Report for Multi-Team/Location.....
- Model Report for Boards of Directors
- Flex Budget Report Examples
- The Best Board Income Statement.....
- Executive Facts – High Level Income Statement - Loaded with Insight
- Benchmark Patient-Day Report
- Trend Report – Income Statement.....
- Summarized Department Report – A CEO View
- *The 7 Good Reports for a Clinical Leader.....
- What is an Exception Report?
- Why is it important for a Clinical Leader to Master the Reports?
- The Financial Report (Monthly).....
- The FTE Report (Semi-Monthly or Bi-Weekly).....
- Average Caseload Reports.....
- The Weekly Visit Report
- All Visits Less than 20 Minutes - Exception Report (Daily)
- All Visits Greater than 90 Minutes - Exception Report (Daily).....
- All Patients Receiving More than 7 Visits in the Last 7 Days - Exception Report (Daily).....
- All Patients That Have NOT Received a Visit in the Last 7 Days - Exception Report (Daily).....
- Best Practices- Accounting
- Contribution Margin Approach
- Indirect Costs.....
- Percentage of Net Patient Revenue
- Pass-Throughs
- Prepaid Expenses.....
- Inventories
- Restricted Funds.....
- Capital Campaign Expense
- Revenue Adjustments- Bad Debt and Contractual Allowances
- Revenue Test
- Records Retention - How Long to Keep Records
- General Financial Records
- Business Records
- Insurance Records
- Pension/Profit Sharing Records
- Tax Records.....
- IRS Information.....

- Credit Card Review.....
- Benefits in the Chart of Accounts.....
- In-Kind Donations
- Continuing Education.....
- Investment Strategy.....
- Accounts Receivable Roll-Forward Schedule
- Chart of Accounts.....
- Unit Accounts
- Working Smart - Understanding the Tools
- The MVI Management & Benchmarking System
- Making Your Hospice a Financial Success
- Purpose of the System and about Multiple Perspectives
- Access to the System
- The MA (Management Application)
- The BA (Benchmarking Application)
- What does the Management & Benchmarking System mean to the Hospice World?
- How does the Benchmarking Application Work?
- Information tab
- Executive Dashboard
- Quality Measurements
- Graphical Representations.....
- Percentage of Net Patient Revenue (NPR) Detail Reports
- Patient-Day Detail Reports.....
- Analysis of Indirect Costs
- Balance Sheet by Average Daily Census Comparison
- Best Budgeting Practices
- Budgets are an outdated idea in the MVI world.
- Static or "Traditional" Budgets
- Flex Budgets.....
- Cost Report
- The Role of Money... ..
- Day 2 – Work Your Posterior Off!.....
- Leadership Concepts
- There are No Quick Fixes Regarding Leadership.....
- The Law of the Lid
- Leading by Example - The Most Powerful Form of Leadership
- Morale is the Product of the Immediate Leader
- The Replication Principle
- How to Get People Bought-In!
- What is Tolerated Becomes Accepted.....
- The Insecure Leader.....
- Being Liked While Holding an Unpopular Position.....
- A Top Leader Can Take Little and Make A Lot Out of It!
- Profit While Preparing for Growth?

- If You Want Things to Improve, Stop Telling People How Bad it Is!
- Constantly UPGRADE Your Team
- Be Willing to Take Your Own Medicine.....
- Attributes of Great Leadership.....
- Most People Think They are Good Leaders
- Leadership is about Results and More... ..
- Values.....
- The Good, the Bad, and the Sorry... Bean-Counters, Score Keepers, and
Captain CRUNCH
- The Factors:.....
- Keys to Managing People
- Motivating
- Reprimand.....
- Firing an Employee.....
- The Two Roads Talk... ..
- Choose Your Time and Place
- Do it! It has to be done!.....
- Mergers and Acquisitions
- Buying Another Hospice
- Moving into Contiguous Services Areas.....
- How Far should we Travel to Serve Patients?
- BIG Hospice Farces & Bad Ideas.....
- Self-Directed Work Teams.....
- Pharmacy Rebates
- Let's Get More Grants!
- The New Program will be a Feeder for Hospice!
- Let's Tell Referral Sources That We Can't Take Patients Because We're So
 Busy and That Quality of Care Will Suffer!
- Let's Get Great Reimbursement for Palliative Care!
- Good to Feeling Great
- The Bus Thing... ..
- Let's do a RIF! (Reduction in Force).....
- Palliative Care
- The Backdoor of Palliative Care
- Increasing Discharge Percentages
- Extra-Curricular Programs.....
- Meetings.....
- "Hospice Style" - Meeting Types.....
- Example Meeting Structure.....
- A Structure
- IDT
- ABC and Its Impact on Meetings
- Dashboards, KPIs, & Critical Activity Reports
- Examples of KPI or CAR Reports and Overheads:.....
- How to Obtain Cost Views by Diagnosis, Payer or Other Demographic

- Multiple Perspectives of Cost
 - A Multi-Perspective of Cost is Made Possible Using Only Three Statistics
- CAP – Aggregate and Inpatient.....
 - When does CAP hit? Is it a version of Hospice Hell?
 - Dealing with the Medicare Aggregate CAP.....
 - The Aggregate CAP is Good, but there is a Flaw
 - Monitoring Medicare CAPs
- Scenario Analysis.....
 - CAP Problem #1
 - CAP Problem #2.....
 - Cost Composition Problem
 - High Indirect Cost Problem.....
 - High Indirect Costs/High Penetration Problem.....
 - High Direct Labor Cost Problem
 - High Medication Cost Problem
- Beware of the Lone Ranger Nurse
- High DME Cost Problem.....
- Low Census Problem.....
- Extracurricular Program Problem.....
- Competition Problem
- Retention Problem
- Inpatient Unit Problem
- Cash Flow Problem
- Staff Retention Problem
- Turnover Ratio.....
- The Nursing Shortage.....
- Is your Hospice Coddling Staff?.....
 - Coddler’s Anonymous Credo
- Triage.....
 - The 24/7 Hospice.....
 - Stop Trying to Hire “A Players” on a D Budget!
- Growing Your Hospice
- Firing People to Grow the Hospice
- The Two Kinds of Growth.....
- The Role of Confidence in Selling
- Quick Points on Growing a Hospice.....
 - Stop Wasting Dollars on Media to Grow Census
 - Rework the Admissions Department.....
 - Look at Your Discharge and UR Process
 - Rework the Marketing & Outreach Department
 - Adopt Open Access
 - Increase Efforts in Nursing Homes & Assisted Living
 - Become World Class
 - NEVER NEVER NEVER Say You Can’t Take Patients
 - More Thoughts on Marketing... ..

- Record ADC Levels
- Work on “Self” First.....
- Building the “System” - Three Specific Areas.....
 - Attack Nursing Homes
 - Paper Routes.....
 - Increase Average Length of Stay (ALOS).....
- Speaking Points for General Referral Sources.....
 - Behind the Scenes
- Speaking Points for Nursing Homes/ALFs
- World Class Hospice
- World Class Checklist.....
 - Examples of World Class Organizations
 - Examples of Products
 - Examples of Services.....
 - The Hospice Menu – Giving Patients & Families CONTROL of the Experience
- Challenging Ideas about Clinical Practice.....
- How Do You Start the Transition to World Class?
- The Volunteer Department – A Wasted Opportunity.....
 - Volunteer Best Practice – Almost like E-Harmony.com!.....
- Phone Skills.....
 - Dial 7 if You’re in Pain... ..
 - “Digging” Phone Skills Focusing on the Situation
 - The Mystery Caller Program
 - Hold Music?
- Cash Flow
- Continuous Care (Crisis Care Program).....
- Inpatient Units
- Why Have an IP Unit?
- The Three Major Factors to IP Unit Financial Success:.....
- Inpatient Unit Financial Problems
- Hospice IP Management Declines.....
- Insights into Inpatient Unit Operations
- Extra-Curricular Programs.....
- Activity Logs & Time Tracking
- Level of Care Reporting
- Open Access Hospice
- Loss of Clinical Discipline with Open Access.....
- Clinical Graphs - Making People Aware
- Indirect Costs
- The Myth of Size & Economies of Scale in Many Hospices
- The Discipline of Half-Days for Learning
- A List of Learning Topics
- Communicating Your Expectations
- 5 Questions to Help You Gain Clarity

- Methods of Communication
- Community Support and Fundraising
- Casual versus Event-Driven Support.....
- Alternative Care Models
- On-Call
- On-Call and Afterhours
- Different Models for Different Needs
- Rural vs Urban Hospice
- Pharmacy and DME Reports.....
- Brand and Generic Claims Analysis
- Top Drug Utilization Report.....
- Monthly Top 30 Rx By Prescriber
- DME Reports
- DME – Utilization Report
- More DME Reports
- Day 3 – Did We Make It?
- Physicians
- Hospice Hell
- Running Out of Cash
- Fighting the FI.....
- CEO Nightmare
- Board Nightmare
- No-Nos for Board Members.....
- Relationship Trouble with the CEO
- All CEOs Make Mistakes.....
- *CEO Challenges and Decisions.....
- *Competitive Strategy.....
- Best People
- Questions to Help Choose the Right Leader.....
- What Should You Expect from a Leader?.....
- Results from Leaders
- Best Practices.....
- Where do you get Best Practices? Anywhere you can!
- External Best Practices
- Internal Best Practices
- *Strategic Planning.....
- Should we bring in Consultants for Strategic Planning?
- Questions for Strategic Planning
- How to Track Strategic Plan Progress.....
- Examples of Strategies:.....
- More CFO Mindsets: Supplemental
- Profit While Preparing for Growth?
- Cost Report
- Accounts Receivable.....
- Method #1

- Method #2
- Method #3
- Accounts Receivable Management
- Training Systems.....
 - All Top Clinical Leaders are Teachers
 - Hiring Profiles
 - Hire for Leadership
 - The HR Position or Department.....
 - Training Methods
 - Re-Alignment.....
 - Knowledge Systems
 - Give People Time to Learn
- Discover and Water Talents Instead of “Learned Skills”
- Integrating Systems – CFO As Driver
- The Realities of the Human Condition
- Laptops and Remote Field Devices.....
- What to Integrate and What Priority?
- Negotiating Points When Purchasing a Patient-Management System
 - The Mission Critical Applications (in order of importance)
 - Utility Applications.....
 - The Utility Applications that Hospices Need to Use
- The Master System Plan...the Absolute Key to Integrated Systems
- Backdoor Integration
- Rethinking Donor Systems.....
 - The Systems.....
- Running the Finance Department.....
- Cost Report Example
- Common Mistakes:
- The Cost Report is Serious Business
- Things FIs Don’t Like
- The Submission Package

- Building a Hospice from Scratch
- What Will You Do When You Get Back to Your Hospice?
- What are you going to do when you get back to your hospice?
- Hospice Finance 101.....
- Physician Billing.....
- CAP
- Cost Report.....
- Supplemental Information – Hospice Statistics and Other
- Top 10 Hospice Survey Deficiencies.....
- MedPAC Presents on Hospice Payment Adequacy at December Meeting
- December 16, 2011*
- Revision of BNAF and Medicare Rate Cuts
- The Short List.....
- The Presenter.....

Andrew Reed, CPA/System Analyst
Index
List 1: The Start-Doing List
List 2: The Stop-Doing List
List 3: Gotta-Go List
List 4: Gotta-Grow List.....
List 5: The Balance List
Evaluation Form
Evaluation Form-Continued.....



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