

December 8 – 9, 2025

CHC Leadership Workshop: Scorekeeper to Strategist

Training Description

Do you have what it takes to move from a task-driven scorekeeper to a forward-thinking strategist for your community health center? As health center finance moves upstream & increases in complexity, it's crucial for organizations to adapt to achieve peak performance. Join us as we team up with the Texas Association of Community Health Center (TACHC) to bring you this CPE-eligible training where we will dive into the changing role of leadership in today's Community Health Centers (CHCs). This session is designed for CEOs, CFOs, COOs, & other leadership roles within CHCs.

What to expect:

Strategic Direction - Learn how to provide overall direction to your organization to ensure resources are allocated effectively & how to evaluate the financial consequences of proposed decisions.

Financial Forecasting - Master strategies for forecasting & managing prospective financial outcomes, demonstrated by a walk-through of a sample Excel forecasting model.

Contract Negotiations – Practice negotiating favorable terms, leveraging legal protections, & the value of participating in provider networks to optimize healthcare outcomes & reimbursement.

Effective Communication - Discover techniques for communicating complex financial matters to non-financial stakeholders.

Leadership Synergy - Explore the dynamic CEO/CFO partnership & its impact on organizational success.

Interactive Workshops - Network with leaders from other CHCs across the industry while you engage in real-time strategy development & discussions to leave with actionable insights & plans.

Presenters: Jeff Allen, Partner; Catherine Gilpin, Partner; Colleen Bertacini, Senior Consultant

Dates

Monday December 8; 9:00am – 5:00pm CT & Tuesday December 9, 2025; 8:00am – 4:00pm CT

Location

Magnolia Hotel Houston, a Tribute Portfolio Hotel
1100 Texas Avenue Houston, Texas, 77002

Suggested Audience

Community Health Center CEOs, CFOs, COOs & other operational & finance leaders

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Registration Fee

Registration is \$1,500 for the first attendee. Each additional attendee from the same organization is only \$750!

**Special rates for TACHC Members – Contact Cheryl at chctrainingsandevents@us.forvismazars.com for details*

Refund Policy

Requests for refunds received before November 21, 2025, will receive a full refund. No refunds will be granted if not requested by that date.

Learning Objectives

Upon completion of this program, participants will be able to:

- Evaluate the role of a strategic CFO in a Health Center
- Analyze financial data & Key Performance Indicators (KPIs) used in CHC operational decision making
- Describe methods for processing & communicating financial information to non-financial stakeholders
- Explain the strategic planning process, including relevant data needed

Continuing Education

Up to 13.0 NASBA CPE credits (pending approval) in the Specialized Knowledge field of study may be awarded upon verification of participant attendance.

Delivery Method

Group Live

Program Level

Intermediate

Advanced Preparation

None

Prerequisites

Attendees should have experience and/or exposure to CHC finance & operations.

If you have questions or concerns regarding CPE credit, contact cpecompliance@us.forvismazars.com



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Agenda

Times are in Central. Agenda is tentative & subject to change.

Day 1		Monday, December 8 9:00 a.m.–5:00 p.m. CT
8:00 a.m. – 9:00 a.m.	Continental Breakfast Provided	
9:00 a.m. – 10:15 a.m.	Session 1: Moving the CFO from Scorekeeper to Strategist	
10:15 a.m. – 10:30 a.m.	Break – Light refreshments provided	
10:30 a.m. – 11:15 a.m.	Session 1, Continued	
11:15 a.m. – 11:45 a.m.	<i>Scorekeeper Workshop</i>	
11:45 a.m. – 12:45 p.m.	Break – Lunch Buffet provided	
12:45 p.m. – 2:45 p.m.	Session 2: Navigating 340B and Pharmacy Optimization	
2:45 p.m. – 3:00 p.m.	Break – Light refreshments provided	
3:00 p.m. – 4:15 p.m.	Session 3: Bringing the Numbers to Life	
4:15 p.m. – 5:00 p.m.	<i>Communication Workshop</i>	
Day 2		Tuesday, December 9 8:00 a.m.–4:00 p.m. CT
7:00 a.m. – 8:00 a.m.	Continental Breakfast Provided	
8:00 a.m. – 9:15 a.m.	Session 4: Modeling the Forecasting Tool	
9:15 a.m. – 10:15 a.m.	Session 5: Financial Reporting, Dashboards & KPIs	
10:15 a.m. – 10:30 a.m.	Break – Light refreshments provided	
10:30 a.m. – 11:45 a.m.	Session 6: Strategic Financial Planning	
11:45 a.m. – 12:45 p.m.	Break – Lunch Buffet provided	
12:45 p.m. – 4:00 p.m.	Session 7: Characteristics of High-performing CHCs; Workshop Wrap-up	