

*Leadership in the Changing California
Health Information Environment*

California Health Information Association
Strategic Focus and Priorities
2020 - 2022



March 2019



Preface

The California Health Information Association (CHIA) celebrates its 70th anniversary in 2019. Seven decades of ensuring service to quality health information for Californians. Seven decades of commitment to the professionals who manage medical records and other forms of health information.

In 1949, the California Association of Medical Record Librarians, as it was then known, had 18 founding members working as “medical record librarians.” California had just celebrated its centennial and, with a population of 10 million, the state already had 350 hospitals. California was then and continues to be a trendsetter for the US across many sectors of its national life, including health care. California leads the country in its public health initiatives and repeatedly pushes the envelope in protecting personal privacy and creating new models for integrated health systems.

In 2019, CHIA celebrates seven decades of progress serving health information management professionals and health care in California. The past decade has brought profound technological changes impacting health information and the way it is managed. Relatively few organizations reach their 70th anniversary. The continuous disruptive force of technology is a key reason. Disruption in health care is not new but its speed, complexity and scope are. This distraction is most certainly being felt by all organizations including CHIA and by the health information professionals it serves.

**In 2019 CHIA is celebrating its successes
...while shaping its future!**



Table of Contents

1. Introduction	4
Three-year Planning Horizon	4
2. Environment, Trends and Drivers	5
Major Environmental Scan Insights Regarding Health Information Practice	5
Professional Association Trends	7
Membership Trends and Data	8
3. Overview of the 2020-2022 Goals and Strategies	10
Vision, Mission and Value Statements	10
2020-2022 Goals and Strategies	11
High Impact Strategies	15
4. Desired Outcomes for 2022 - DRAFT	19
Launch Goals for 2020	21
5. Envisioning CHIA’s Future State	23
Appendix 1: Environmental Scan Findings	24
A. Interview Findings	24
B. e-Survey Findings	27
C. Data on CHIA Today	29
Appendix 2: Strategic Planning Meeting Agenda	33

1. INTRODUCTION

CHIA developed the strategic plan described in this report to guide its work over the next three years, 2020-2022. The CHIA’s Board of Directors is responsible for setting the direction for the organization, and undertook strategic planning for the following key reasons:

- As a critical examination of the changing environments and the *threats and opportunities* they present,
- To identify strategies that are most likely to produce high value, *longer term impact* and to advance the CHIA Vision and Mission,
- Because there are always a range of paths forward, planning helps to reach consensus on how best to *choose between different paths*, and
- Gaining agreement on key priorities unifies the organization and guides *how resources will be allocated*.

Three-year Planning Horizon

CHIA uses a three-year planning horizon, and 2019 is the last year of its current three-year strategic plan, 2017-2019. The 2020-2022 strategic plan will guide preparation of the 2020 budget, the work of the board of directors, CHIA’s component local associations, and its house of delegates. Operational plans will be aligned to the priorities reflected in this plan and taken together, this level of coordination for a multi-year period will produce greater impact and continuity than if CHIA only planned during the course of preparing annual budgets. The strategic plan guides budgeting, not the other way around. Annual tactical operational plans will be put in place to advance each strategic priority, thereby aligning operations and budgets to strategies.

A clear set of strategies informs all CHIA members and supporters in its current services to advance its mission. It signals to key stakeholders such as AHIMA and other health care groups in California what CHIA believes to be its most important work considering current challenges. The strategic plan also serves as a foundation for engaging members and advocating policies and practices that support key goals.



Having a three-year strategic plan does not mean that CHIA is locked into a specific set of actions. Each year the board evaluates the strategies and tactics that have been used and considers what’s working and what’s not and adjusts accordingly. It can adjust goals and strategies if a changing environment requires a rapid response. A three-year plan is a dynamic planning tool that is continually evaluated and adjusted to maximize impact and relevance.

2. ENVIRONMENTAL, TRENDS AND DRIVERS

CHIA examined evolving external trends impacting health systems, generally and health information practices specifically, as well as those impacting professional associations. CHIA also examined data relating to its membership, business model and services. A variety of data sources were utilized including structured interviews, e-survey of members, recent feedback from the house of delegates, review of data about CHIA’s members, services, financial performance and a literature research. Environmental scanning enables CHIA to gain an understanding of:

- The external threats and opportunities, issues and trends impacting CHIA’s members and the association as a non-profit membership organization,
- The strengths and weaknesses of CHIA that effect its ability to navigate evolving trends and
- The adequacy of CHIA’s resources to implement the strategic plan.

Major Health Information Practice Environmental Scan Insights

CHIA surveyed members with a fifteen-question e-survey that tested the strength of certain trends on health information practice and member expectations regarding association membership. The following table summarizes top trends impacting information management practice. A summary of the environmental scan survey and interview findings are shown in Appendix 1.

Rank	Top 5 health information management trends based on the CHIA member survey.
1	More people are seeking access to their health information.
2	The demand for accurate and complete information is driving greater focus on information management and governance.
3	The population health improvement focus expands the scope of information management.
4	Technology such as artificial intelligence is changing HIM work such as coding, data management.
5	Enterprise-wide information management requires expanded competencies and leadership skills.

The percent of members who “strongly agree” and “agree” with trend statements ranged from a high of 93% for the first ranked trend to 80% for the fifth ranked trend. Information management practice is being impacted by trends related to changing consumer attitudes about their health information, expanded uses for health information, health information technology and health system consolidation.

These trends were reinforced by structured interview input received from CHIA leaders, members and other stakeholders. The following table summarizes the top trends identified through structured interviews. Overall, there was strong consensus that the pace of change has accelerated over the past 3-5 years. The bolded trend was strongly recurring: HIM managerial and supervisory roles have sharply decreased as HIM services are redesigned. At the same time, HIM skills and competencies have broader value in new knowledge roles.

Interviewees used their own words and examples to describe trends they have observed related to health system restructuring, the impact of information technology and the evolving health information domains and competencies required to manage data that is now largely digital.

How has health information management practice in California changed over the past 3-5 years?
<ul style="list-style-type: none"> • Shift to enterprise/corporate structures with overall decrease in director/managerial roles and dissolution of HIM departments. • HIM has split into three domains: coding, rev cycle and clinical documentation; IT, data governance and analytics, and; records management including privacy and confidentiality. • Overall, the number of available positions is shrinking even for experienced professionals. • Master’s degree is baseline for managerial roles. • Technology enables shared services and this further reduces available positions. • HIM roles expanding to include biotech, IT and other health data roles and new graduates are being encouraged to look beyond traditional roles. • Coders see change coming and are concerned for their jobs. • HIM’s role in Electronic Health Records (EHR) applications and data analytics is often not as central as it should be. • Skill sets changing; technology and applications aptitude is foundational. • Entry level positions are not clerical processing skills; today’s entry is a knowledge role. • The boundaries of HIM are “more opaque.”

Despite the pace of change and its impact on the organization, staffing and HIM professional expectations, change is expected to intensify in the coming years as technology enables greater interoperability and connectivity between patients and their care givers. A vision for a new paradigm for how care is delivered was discussed by the strategic planning group. This future calls for “automated integration of a patient’s records across information systems to enable a comprehensive, longitudinal view with information accessible through multiple devices, including the patient’s phones.”¹ The authors of this vision point out that technology is not the barrier to realizing this compelling vision.

The issues called out are central for HIM in the years ahead: improve the quality and integrity of patient data; streamline documentation requirements; adopt standards and technologies for data governance, health terminologies and vocabularies; adopt technology for information

¹ National Academy of Medicine. A Vision for a Person-Centered Health Information System, October 1, 2018. Found at: <https://nam.edu/a-vision-for-a-person-centered-health-information-system/>



management workflow and operations; modernize definitions of the health record and address patient concerns about privacy and security of their personal health information.

Reflecting on the coming five years, interviewees identified the following threats and opportunities:

- The pace with which artificial intelligence (AI) technology will impact certain health information functions, to paraphrase, “we know it’s coming, but how fast will the impact be felt?”
- How to describe health information management work in a digital health environment?
- The impact of professionals who do not or cannot invest in continuing education and are who not getting help from their employers.
- Career opportunities for HIM as a result of mergers and organizations expanding into health care (e.g. CVS and Aetna, Amazon health, Apple health) targeting potential candidates from other disciplines such as analytics, artificial intelligence, machine learning represent skillsets not fully adopted by most HIM professionals.
- Graduates with informatics, analytic, and clinical skills are being hired for future focused information roles. This raises the question, is HIM education keeping pace and is it preparing students for new roles at the right academic level?

Professional Association Trends

The CHIA member e-survey tested trends relating to resources professionals use in the course of their work, the value of professional networking and the perceived value of professional association membership in their careers. The following table summarizes the highest ranked responses (“strongly agree” and “agree”) from CHIA members concerning services generally available through association membership.

Rank	Top 4 trends impacting professional associations based on the CHIA member survey.
1	Web resources are the first route for researching professional practice questions.
2	A key value of CHIA is that it is a trusted source of information and education.
3	There is more limited opportunity for employer reimbursed continuing education and time off.
4	Professional associations are modernizing how they use technology to deliver flexible services.

Tied for the most highly ranked trend at 93%, “strongly agree” and “agree”, respondents ranked the value of web resources over traditional print sources for practice information. They also rated highly the value of CHIA as a trusted source of information and education. At the same time, members find more limited support (from employers and because they are self-employed or under-employed) for their education as an observable trend, with support including reimbursement as well as the ability to take time off. Eighty percent (80%) of member respondents reported that they value the use of technology to deliver flexible member services.



CHIA's leaders know full well that this is a tumultuous time for membership associations. Four important issues were identified by the CHIA's board when asked about key challenges for this planning period.

- Connecting to the next generation, a generation that often rejects the traditional notion of "membership" in the sense of paying dues for certain rights and services.
- Helping members to gain new skills and competencies in order to improve workflow and the adoption of technology.
- Attracting, retaining and engaging members while offering a meaningful business model for membership.
- New and diversified sources of revenue.

Another variable that challenges CHIA's planning efforts at this time is the strategic change that the American Health Information Management Association (AHIMA), of which CHIA is an affiliate, is currently undergoing. This planning anchor, therefore, is not available to CHIA.

Against this background, CHIA's strategic planning group concluded that they should focus more deliberately on what health care and the HIM profession in California needs over the next 3 years. In doing so, they identified CHIA strengths to be leveraged:

- The talent and commitment of HIM professionals,
- The diversity of CHIA's members in terms of their education, age, roles, ethnicity while acknowledging that gender diversity remains out of balance,
- A generally engaged membership,
- Financial resources to invest in strategic priorities and
- An executive office team to help execute on strategies.

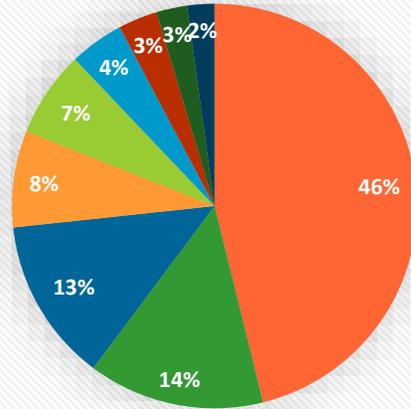
Membership Trends and Data

Several demographic and membership trends were analyzed and selected tables are included in Appendix 1. CHIA today has approximately 7,250 AHIMA active members, making it the largest AHIMA component state association. However, with more than 9,000 AHIMA credential holders in California, there is room for growth but there is also significant risk of loss of members if technological and health delivery changes displace health information professionals in the future.

Data shows approximately 60% of California members work in technical and clerical/administrative positions. Members in managerial positions comprise approximately 30%. About 75% of California members work in patient care settings, hospitals, clinics and other provider settings. Of note, employers of new graduates are generally less acute care-based.

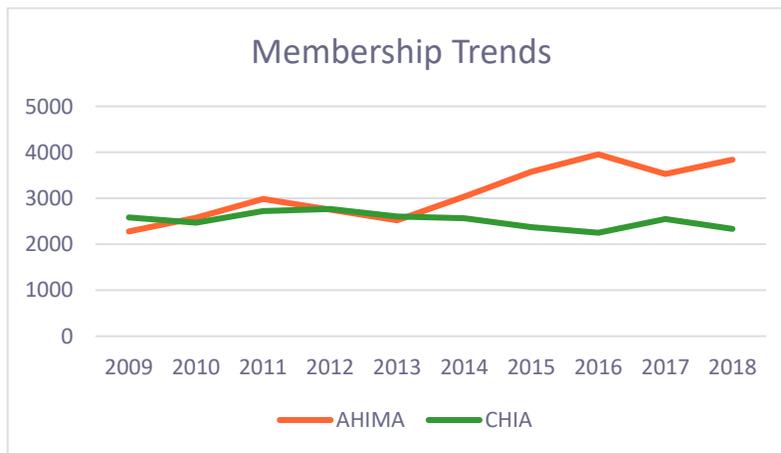
Job Categories - 2018 (Based on AHIMA Data)

- HIM Technician Role
- Manager/Supervisor
- Clerical/Administrative Support
- Director
- Consultant
- Clinician
- Educator
- Technology
- Executive/President/Vice President



Following an extended period of limited California based college programs for HIM education at the baccalaureate and master’s levels, new programs at these higher levels are now being offered. Academic levels impact advancement into to managerial levels, so this is an important new trend for CHIA to monitor. Upon further study of new graduates, 381 or nearly 40% are unemployed or are not declaring a work setting. The data show baccalaureate graduates are getting a variety of interesting job opportunities. The lagging employment of new graduates is most likely due to the lack of hiring for new associate degree technical workers. Credential and career stage data was also examined.

The strategic planning group looked at data on membership trends, and while the overall membership is growing, only about one-third (2200 members) of AHIMA members support CHIA through state dues. Over the past five years, the proportion of AHIMA members in CA who are also dues paying CHIA members has declined.





3. OVERVIEW OF THE 2020-2022 GOALS AND STRATEGIES

Strategic Planning Retreat

A planning retreat was held on January 11 and 12, 2019. The strategic planning group was comprised of CHIA’s board of directors, component local association leaders, a graduate member and a student member. The participants are identified in Appendix 2. The retreat was designed to examine and deliberate on the implications of the environmental scan findings and to identify a set of high impact strategies, objectives and key outcomes for the 2020-2022 planning timeframe. In addition, the CHIA vision, mission and values statements were rethought, and revisions made to make them more relevant and useful in today’s environment. The goals of the strategic planning retreat were to:

- Achieve consensus on the critical trends and drivers of change impacting CHIA, its members and the work that it does.
- Identify key strengths and weaknesses of CHIA and the opportunities and threats to be considered in planning.
- Identify uncertainties that must be taken into account in planning.
- Design a draft set of high impact strategies, objectives and measurable 2022 outcomes.
- Confirm or update the vision, mission and values statements.

The balance of this Report lays out the key work products of the retreat and the opportunities that they offer to CHIA as we begin our 71st year:

- Goals and Strategies
- 2022 Desired Outcomes
- CHIA’s capabilities to achieve the outcomes
- Refined Vision, Mission and Values statements

Vision, Mission and Values Statement

An association’s vision, mission and values are declarations of why it exists, its long-term aspirations, and the values it is committed to, as it carries out its work. Together, these are important *directional statements* that reflect the association leadership’s understanding of what the organization’s stakeholders – its members and others it directly serves such as health care organizations, the general public, and society at large – expect from the association in exchange for being granted a non-profit, tax exempt status. These statements also serve as a touchstone to help the board make decisions, choose between strategic paths and set priorities.

As part of its three-year strategic planning cycle, the CHIA board considered whether the statements reflect their current understanding of stakeholder value and how best to describe the position of the association. Before and after statements are shown in the diagram below.



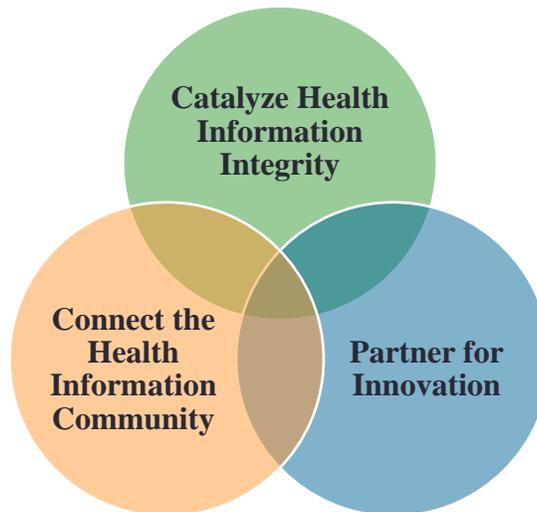
2020-2022 Goals and Strategies

The 2017-2019 plan called for advancing four key goals of Information Governance & Health Informatics, Leadership, Innovation and Consumer Engagement. Ten strategies and associated tactical plans were executed to address these goals. Progress was monitored and tactics adjusted with experience. One conclusion drawn by the board and executive staff from experience of the past three years, was the need for greater focus to channel resources and effort on fewer activities that have potential for greater impact.

Based on environmental scan findings, there was consensus that CHIA will be most successful in advancing its mission and vision through a few *high impact goals and strategic priorities* for 2020-2022 that:

- Reflect information management fundamentals in a digital health environment,
- Are cross-cutting in a more diverse health information community and
- Address current public policies that impact health information management.

Engaging health information professionals across a broad range of roles, from 2020 through 2022, CHIA intends to focus on three key goals that will be advanced using highly synergistic strategies:



Goal 1: Catalyze Health Information Integrity

Considering the many challenges of managing health information across IT systems, in physical form, when it is personally identifiable or de-identified, and across an ever-expanding range of uses, the *linchpin* of the CHIA Vision of trusted information is the integrity of health information. Information integrity is a prerequisite for trust.

Catalyze:
Accelerate or increase the rate of a process; inspire and bring about; significantly alter and inspire.

The quality of information in health care is a widely acknowledged problem. EHRs and other technologies have yet to be fully leveraged for their potential to monitor and improve data integrity. Data integrity is an undisputed role of health information professionals and CHIA intends to catalyze – to positively accelerate -- improvement efforts and hence to enhance the usability of health information through targeted strategies.

In its discussion of this goal, the strategic planning group went back and forth between the terms information integrity and data quality or data integrity, recognizing that an early need was to adopt a definition of the scope of this complex topic that will guide focus. The group settled on “information integrity” as information is data in context and integrity because, as shown in the box below, this term includes a range of quality characteristics including accuracy, reliability and consistency.²

² <http://www.computerbusinessresearch.com/Home/database/information-integrity>

The discussion brought to light important issues concerning the management of information integrity in electronic health records, patient portals and other systems that rely on accurate EHR data. The discussion also focused on the integrity of information in associated contexts such as coding, release of information, information used for analytics and quality reporting as well as other critical uses.

Information Integrity:
The trustworthiness and dependability of information; the accuracy, consistency, and reliability of information content, processes and systems; information integrity as a prerequisite for clinical and management decision-making.

Thus, advancing this goal:

- Contributes to all of health care’s strategic priorities including patient care quality improvement, population health improvement, payment modernization, health research, etc.,
- Supports the goal of health care cost control because poor data increases operating expenses and impedes timely decision-making,
- Advances a key information management responsibility common to all HIM roles,
- Provides an opportunity to demonstrate the value of HIM services and HIM credentials and
- Supports the interests of patients, providers as well as other stakeholders.

Goal 2: Connect the Health Information Community

Given the growing diversification of the HIM field, a key goal for CHIA must be to connect the HIM community through technology, and by removing barriers discouraging or preventing engagement and participation.

The strategic planning group discussed a number of issues supporting this goal as a high priority:

- People have become accustomed to on-demand resources and services from any organization with which they choose to do business and CHIA is no exception. The current CHIA technology platform does not support the range of functions required to more fully connect our community. In this context, community is defined as a formal (i.e., local association) or informal group with a shared interest (self-selected practice community, those who work in long term care settings, etc.).
- Serving members who pay AHIMA dues only, and those members who pay AHIMA and CHIA dues, creates a de facto tiered membership. While the additional financial contribution of CHIA dues is very important to the association, it may present a barrier to connecting our community. The

membership and corresponding dues strategy require analysis, within the framework of the AHIMA Affiliation Agreement.

- All associations deal with diversity in terms of the tenure of members and the stage of members careers. Younger members and those new to the profession have different needs than those with longer tenure and experience. Bridging the experience of members with longer tenure and the perspectives of newer members is a continual challenge for associations. Traditions that are important to longer tenured members may have little meaning for newer members and may even be counterproductive. In the words of one newer member of CHIA some of this “organizational baggage” is a real barrier.
- The range of health information roles is broader than ever. This trend recently prompted AHIMA to reduce the range of education and practice content it was committed to producing, marketing, and supporting. CHIA faces this same issue, and for this reason the strategic planning group looked for cross cutting strategies relevant for a broad range of professional roles. The quality and integrity of data is one such an issue. It is relevant whether one is an enterprise director of HIM, a release of information manager, a coding professional or a data analyst.

Goal 3: Partner for Innovation

The strategic planning group focused on CHIA’s role in the California health ecosystem and concluded that having impact in the future requires greater collaboration with other organizations that have complementary goals. California is a bell weather state in areas such as privacy, data collection and more recently consumer data protection. In this environment, CHIA’s vision and mission can only be realized through greater collaboration. Thus, partnering for innovation is the third key goal for 2020-2022.

This goal reflects the reality in health care organizations today. Just as information has been digitized and information-related roles are no longer confined within HIM departmental boundaries, HIM has shifted from predominantly ‘line’ managerial function to decentralized knowledge roles. The strategic planning group discussed the importance of acknowledging that HIM contributes to the work of revenue cycle teams, privacy, security and compliance teams, IT implementations and applications, quality improvement and the work of a broad range of companies that serve the health care industry. HIM professionals no longer “leave HIM” simply because they work outside the traditional HIM department. Partnering is essential to be a successful HIM professional today. It is also essential for CHIA.

High Impact Strategies

CHIA identified eight (8) strategies for 2020-2022 to advance the three key goals. This set of strategies reflects a greater focus for CHIA, it nonetheless represents a challenging work plan over the next three years.

Goal 1 Catalyze Health Information Integrity	Goal 2 Connect the Health Information Community	Goal 3 Partner to Accelerate Innovation
<ul style="list-style-type: none"> • Develop and promote best practices, standards, tools and training for health information integrity excellence. 	<ul style="list-style-type: none"> • Offer high value and easily accessible resources and education using web and other technologies. 	<ul style="list-style-type: none"> • Advocate for state policies governing health information across the information lifecycle.
<ul style="list-style-type: none"> • Train, mentor and empower professionals to lead health information integrity improvement activities and initiatives. 	<ul style="list-style-type: none"> • Strengthen opportunities for community connectivity. 	<ul style="list-style-type: none"> • Convene industry stakeholders to advance health information integrity improvement.
	<ul style="list-style-type: none"> • Make membership more inclusive. 	<ul style="list-style-type: none"> • Collaborate to advance patient access and data protection initiatives.

Goal 1 Strategies

To advance the goal of *Catalyzing Information Integrity*, the strategic planning group identified two high impact strategies for 2020-2022.

1. Develop and promote best practices, standards, tools and training for health information integrity excellence.

To begin, CHIA volunteers, staff and contractors will develop first generation content that defines information integrity management methods and current best practices and standards. The strategic planning group emphasized that in the short term, these will be first generation work products because integrity practices are rudimentary today compared to what is required to fully achieve the goals for these initiatives. There are bodies of knowledge, technology solutions and case studies that demonstrate methods that work, but research and development is needed to adapt these to EHR and personal health record (PHR) content improvement; such as coding-related quality improvement functions, release of information, records management and other information management functions.

This work will not be accomplished in 2020 and will not be fully completed by 2022. The strategic planning group envisions a multi-year development process supported by experts in computer science, information management and governance. The group considers this work to be a fundamental way HIM can contribute to high quality patient care and support the engagement of consumers. It is also fundamental to demonstrating the value of HIM in a changing and challenging environment.

2. Train, mentor and empower professionals to lead health information integrity improvement activities and initiatives.

The first strategy involves developing the science and the tools of health information integrity and the second involves helping health information professionals to promote and lead integrity improvement initiatives. This work also begins with helping professionals consider the potential of information integrity improvement, helping them build the case for change and supporting their efforts through training and mentoring. Again, the strategic planning group emphasized that this is more than a three-year effort.

While the first strategy is fundamental to positioning the value of HIM, this strategy is focused on helping information management professionals gain the skills needed for success. This is the concept of *upskilling*, defined as “enhancing employee skills and competencies for a broader or a more complex role within the same or a related area of work.” The work of information management in a digital environment requires new skills. The ability to manage the integrity of information content is fundamental to success across a range of HIM roles as well as for others who have information-centric roles in healthcare.

Goal 2 Strategies

To advance the goal to *Connect the Health Information Community*, the strategic planning group identified three high impact strategies for 2020-2022. These three strategies reflect the imperative that associations offer contemporary digital services. As CHIA members confirmed, they rely on digital information resources and want access to services when and how they want or need them. The three *Connecting* strategies relate to using technologies to modernize how CHIA convenes, delivers services, and performs its work. When it comes to engaging with an association today, members expect a robust technology experience that enables them to take advantage of the full range of association services and do so from any device. CHIA’s technology does not currently meet these expectations.

3. Offer high value and easily accessible resources and education using web and other technologies.

This strategy focuses on offering digital resources through a web platform that is searchable and more dynamic than the current website. It also involves offering education through a flexible web-based platform(s) that supports on demand learning and e-commerce. This strategy specifically addresses the learning and resource needs of CHIA’s members as strongly reflected in the 2018 e-survey and interviews and supported by trends in the association industry at large.

The strategic planning group agreed that this is a very high priority as it will support execution of the health information integrity strategies and will support access to all the other professional resources of CHIA such as journal and newsletter articles and other content. The group also acknowledged that this will require investment by CHIA for advisors, staff and service contracting that can support an association of the size of CHIA. Priorities will need to be set so key functionality is brought online at a pace that can be supported by budgetary and people resources. Tradeoffs are possible in shifting resources to digital formats and saving money on printing and the physical distribution of print materials.

4. Strengthen opportunities for community connectivity.

This strategy entails building CHIA's capability to facilitate member to member networking and two-way member to CHIA communications. It includes building its social media plan and capability. CHIA members have had experience with AHIMA communities of practice and AHIMA Engage offerings over the years. These tools are only as good as the effort members put into staying connected. They are part of a connectivity mosaic and the technologies continue to adapt. The strategic planning group discussed the need to strengthen the *California Community* in order to be able to impact HIM leadership effectiveness in addressing California practice issues.

Social media is one pathway that can provide many opportunities to amplify CHIA's messaging, including its advocacy efforts. However, in today's environment, associations need to be cognizant of the strengths and weaknesses of various approaches. CHIA has very limited connectivity capability today. Connectivity is enabled through live event meetings and in a more limited way through webinars. Moving on this strategy will require careful study of options, and development of a streamlined, coherent strategy to implement online engagement opportunities. Associations have learned that this is an ongoing process challenge and requires iterative adaptation with experience. As with strategy 3, this will require new financial and people resources.

5. Make membership more inclusive.

The number of associations serving the health information space has grown. Education is available from a wide range of organizations, such as HIMSS, ACDIS, etc. Health care organizations are offering their own continuing education to employees to save money and to ensure a consistent level of training. Whereas membership was a mark of common interests, as member data shows, CHIA's membership is increasingly diverse.

As an affiliate of AHIMA, CHIA's members must be AHIMA members. CHIA receives twenty percent of the dues paid to the national association for which its affiliation agreement obligates it to provide certain services. As an association of over 7,500 AHIMA members, the rebated amount is not sufficient to operate a robust association, capable of making the investments covered in this and previous strategic plans. CHIA offers product and services to generate non-



dues revenue and it also levies additional dues to support its operations. As previously shown, a shrinking portion of eligible members pay these additional membership dues.

This strategy underscores the need for CHIA to consider its membership model going forward; specifically how it might better address areas of specialty practice and its state-level dues plan. Characteristics of the desired model identified in the scan include flexibility and inclusiveness. Association experts encourage greater focus for associations, targeting the needs of a definable group.³ Associations are also trying tiered pricing, premium service pricing, organizational membership and other approaches. Adapting membership models requires broad engagement and dialogue, careful assessment of proposed changes and effective communications. With this strategy, CHIA's board intends to begin the engagement and dialogue to understand and plan the way forward.

Goal 3 Strategies

To advance the goal to *Partner to Accelerate Innovation*, the strategic planning group identified three high impact strategies for 2020-2022.

6. Advocate for state policies governing health information across the information lifecycle.

CHIA's Legislation and Advocacy Committee informs the membership of pertinent pending and passed legislation and the regulations implementing California laws. The committee reviews hundreds of pieces of legislation and actively monitors dozens of bills each year proposed by the California legislature and provides expert insight on HIM-related topics as bills work their way through the legislature and regulations are drafted.

The CHIA Legislation and Advocacy Committee keeps CHIA members abreast of legislative activities via informative articles in the *CHIA Journal and Bulletin*, email notices and on the CHIA website. With this strategy, CHIA intends to build upon the good work of review, advising and communication of this committee by proactively advancing key issues that will improve California's health information public policy across the life cycle of information, from decisions about what data are captured to regulations on the retention and destruction of information.

7. Convene industry stakeholders to advance health information integrity improvement.

To be effective today, associations must look outward and partner with other organizations that can help advance their missions, goals, and strategies. The strategic planning group believes that Goal 1: *Catalyzing Health Information Integrity* is important to a cross section of health information stakeholder organizations and will garner broad support in the coming years. It offers CHIA the opportunity to be the convener of a group that brings people together to address the issue and importance of health information integrity.

³ Coerver, H. and M. Byers. *Race for Relevance*. ASAE: 2011, page 75.



Across California, chapters of HIMSS, HFMA and the hospital and medical associations all have a stake in improving health information integrity. California-based leaders of AMIA, AMDIS and ACDIS are also stakeholders. The issue is also of great importance to agencies in the California Department of Health and Human Services.

8. Collaborate to advance patient access and data protection initiatives.

Collaboration is one of CHIA’s values and it can be most effective when focused on advancing important public policy goals. Currently two public policy issues relevant to HIM require CHIA’s focus. Enabling patient access to health information is an expanding public policy goal of the federal government and impacts the work of HIM professionals who manage release of information processes. And second, the California Consumer Privacy Act of 2018 (CCPA) reinforces and even expands the information privacy rights of individuals. While a different scope than patient access, individual rights lie at the heart of both public initiatives. The 2020-2022 strategic focus offers CHIA an opportunity to lead through convening and collaboration.

4. DESIRED OUTCOMES FOR 2022 - DRAFT

The strategic planning group next considered the outcomes that they see as evidence of successful execution of each strategy. This table is a first draft that needs further refinement. This refinement will be done during FY 2019-2020 by the board of directors and senior staff. Consideration will be given regarding how to best pace and sequence the strategies based on resources and how fast progress is being made. As a three-year plan, these outcomes will be defined and progress measured annually.

Goal	Strategy	Desired outcomes for 2022
<p>Catalyzing Health Information Integrity</p>	<p>1. Develop and promote best practices, standards, tools and training for health information integrity excellence.</p>	<p>1.1 First generation best practice tools/resources, toolkits and standards are available. 1.2 A California health information integrity training program is in place. This includes modules for major domain area as agreed upon (e.g., EHR/PHR, coding, compliance, privacy). 1.3 Training/tools adapted to at least one non-acute health information setting. 1.4 Partner with other health care industry professional(s) to provide targeted training. 1.5 HIM professionals speaking to California stakeholder groups.</p>

Goal	Strategy	Desired outcomes for 2022
	2. Train, mentor and empower professionals to lead health integrity improvement activities and initiatives	2.1 Formal mentoring for student and new professionals on information integrity. 2.2 A consumer-oriented outreach is available about the importance of health information integrity. 2.3 Articles from health information professionals about information integrity best practices published for CHIA’s members and for at least two other California stakeholder groups.
Connect the Health Information Community	3. Offer high value and easily accessible resources and education using the web and other technologies.	3.1 CHIA’s technology offers the opportunity for members to interface with CHIA. 3.2 CHIA offers education and training products via web. 3.3 Have evidence of the usefulness of the web resources.
	4. Strengthen opportunities for community connectivity.	4.1 Research stakeholder needs and understand relationships with other professional association. 4.2 Offer connectivity resources so members can engage with one another; evaluate use and value to members. 4.3 Develop professional interest groups.
	5. Make membership more inclusive.	5.1 Expand member profile data. 5.2 Develop a plan to evaluate CHIA dues assessments associated with “membership” by 2022. 5.3 Increase proportion of members that are actively engaged. 5.4 Implement professional practice councils/interest groups.
Partner to Accelerate Innovation	6. Advocate for state policies governing health information across the information lifecycle.	6.1 Host an annual Hill Day in Sacramento. 6.2 Advance policy proposal. 6.3 Establish a more formal relationship such as CHA and CAHQ.
	7. Convene industry stakeholders to advance health information integrity improvement.	7.1 Create information integrity standards task force with consensus on levels of integrity standards defined. 7.2 Produce data integrity white paper.

Goal	Strategy	Desired outcomes for 2022
	8. Collaborate to advance patient access and data protection initiatives.	8.1 Develop guidelines on compliance with patient access requirements to mitigate risk of information blocking. 8.2 Provide education programs on patient access guidance marketed to compliance and other health care organizations. 8.3 Prepare CHIA input to CA agency responsible for implementing the CCPA. 8.4 Inform CHIA members about developments with consumer data protection.

A strength of this plan is its interdependencies. For example, revealing opportunities and methods to improve health information integrity can be leveraged to strengthen collaboration. Investments in technology for CHIA will provide members with greater choice and expanded opportunities for non-dues revenue. At the same time, some strategies are dependent on others. For example, the ability to make best practice tools and toolkits available to members, relies on having the necessary web platform capability. Likewise, the ability to convene stakeholders depends on having the health information integrity initiative better defined. Deciding the sequence and pacing for executing the plan was an important area of discussion for the strategic planning group. Furthering these strategies will be the work of the board of directors with input from the membership.

Launch Goals for 2020

These interdependencies are reflected in the sequencing example depicted in the table below. The *must dos* for FY 2019-2020 are the most important part of this table. Progress made in 2019-2020 will inform the accelerating action steps for 2020-2021 and the final form that 2021-2022 outcome measures will take. Thus, getting the 2019-2020 priorities right and making sure that they are adequately resourced is the next important work of the board of directors in consultation with component local association leaders and others.

2019-2020	2020-2021
<p>To launch Goal 1</p> <ul style="list-style-type: none"> • Convene panel supported by experts to define the dimensions of health information integrity that HIM can impact. • Execute a membership wide information campaign on health information integrity. • Feature programming and articles on HII throughout the year. • Produce one web health information integrity orientation training module. • Secure advice on how to brand CHIA’s health information integrity initiative. 	<ul style="list-style-type: none"> • Release first draft of tools/resources, toolkits and standards work. • Undertake more formal research on dimensions of best practices; produce a white paper and share with members and the industry at large. • Continue education program development and member education.
<p>To launch Goal 2</p> <ul style="list-style-type: none"> • Contract for an association technology advisor (who is vendor neutral) to identify service solutions. • Body of Knowledge software or cloud service contract for development of two web training modules, one on EHR integrity and one on a coding-related integrity topic. • Contract for advice on a social media plan that can be administered by CHIA and will meet CHIA’s requirements for security and confidentiality. • Hire a CHIA technology staff leader. • Secure advice on how to brand CHIA’s digital offerings. 	<ul style="list-style-type: none"> • Expand web training content development. • Develop and release a new web platform that includes e-commerce. • Roll out social media plan. • Contract for replacement of association management software platform.
<p>To launch Goal 3</p> <ul style="list-style-type: none"> • Be an active participant in the development of regulations for the CA Consumer Privacy Act. • Brief members on the California Consumer Privacy Act and its implications. • Work with Compliance and legal professionals to refresh release of information guidelines in line with recent OCR announcements. • Plan a CA Hill Day for 2021 as a co-hosted event or solo. 	<ul style="list-style-type: none"> • Host or co-host a Hill Day in Sacramento. • Convene a health information integrity standards task force with consensus on levels of integrity standards defined.

5. ENVISIONING CHIA'S FUTURE STATE

The strategic planning group concluded its work by considering the impact of these strategies on CHIA as an organization that had executed on these three goals. There was strong consensus that it would make it easier to demonstrate CHIA's value proposition to members and to the health care industry in general.

- It would offer resources to directly help HIM professionals upskill for a technology environment.
- CHIA would be a more virtual association, offering on demand and searchable resources developed for California.
- There would be new sources of revenue through on demand education accessible to members and to non-members at prices reflecting a discount for members.
- There would be a more unified membership/community able to connect to one another.
- There would be demonstrated competency in managing the development of a major practice improvement initiative.
- There would be improved capability of convening a cross-industry group to address a known need.
- There would be a more active association advocacy profile.

The strategic planning group was reminded that the value of the strategic plan is demonstrated by the ability to take first steps. Big plans may “excite leaders with grand visions of outcomes and industry leadership. The problem is that there is no link to the actual big moves required to achieve the vision and in particular no link to the first step to get the strategy underway.”⁴ This sound advice is guiding the board of directors as it builds its 2019-2020 budget. In the first budget year, July 2019 through June 2020, the board will set milestone markers at 6 month increments and continually test the tactics that are budgeted for the early part of 2020. This will require deciding what to focus on and what to deliberately forego.

The 2020- 2022 CHIA strategic plan reflects a visionary yet pragmatic view of how the association can bring value to its members and other stakeholders in a rapidly changing environment. The next steps are to share the vision and plan with CHIA leaders and members at large and secure their engagement and support. The 2019 House of Delegates will be asked to consider how best to engage members in contributing to the plan's success. Component local association leaders participated in the development of this plan and will be key to helping CHIA members understand the personal value of the 2020-2022 CHIA strategic plan for all California health information management professionals.

⁴ Bradley, C. M. Hirt, and S. Smit. Eight shifts that will take your strategy into high gear. McKinsey Quarterly, April 2018.

**Appendix 1
 Environmental Scan Findings
 December 2018**

**A. Interview Findings
 (Strongly recurring responses are bolded)**

1. Observations about CHIA

Board of Directors	CLA Leaders
How would you <u>personally</u> answer the following question: <i>I value CHIA most for:</i>	
<ul style="list-style-type: none"> • Networking – “it's a community” • Part of professional life • Education 	<ul style="list-style-type: none"> • Networking and relationship building • Source for information, including best practice • Continuing education • Professional direction • Leadership development
How do you think the <u>average member</u> of your CLA would answer this question: <i>I value CHIA most for:</i>	
<ul style="list-style-type: none"> • Education, particularly coding • Non coder not finding what they need to advance • Competition for education from variety of sources including employers • Networking 	<ul style="list-style-type: none"> • Continuing education CEUs (at reasonable cost) • CLA provides access to education for non-CHIA/AHIMA members • Networking, particularly students and new members looking for initial jobs
How do you think the <u>average member</u> of your CLA would answer this question: <i>What I most need from CHIA is:</i>	
<ul style="list-style-type: none"> • Direction in terms of where the field is going – fear about whether I am going to have a job in the future • Career services/mentoring • Continuing education • Relevant breaking news • Expanded opportunities for networking 	<ul style="list-style-type: none"> • Seeking reassurance in the face of fear of the future that jobs will go away • Coding education at local level (more advanced than available through the health system) • Help in securing and retaining jobs/mentoring • Need varies depending on the stage of one’s career
As a member of the Board of Directors, what is the greatest challenge that CHIA faces in the next 3-5 years? (question posed to CHIA Board only)	
<ul style="list-style-type: none"> • Connecting to the next generation • Educating members in new areas of competence • Attracting and retaining members; need to understand why people are members of AHIMA and not CHIA • New sources of revenue • AHIMA’s direction not clear at present and many members see CHIA and AHIMA as one and the same 	

Board of Directors	CLA Leaders
As a member of the Board of Directors, what is CHIA’s greatest asset to be leveraged? (question posed to CHIA Board only)	
<ul style="list-style-type: none"> • Talent and commitment of the profession. • Membership diversity in terms of education, age, roles, ethnicity (while still lacking gender diversity) • Membership generally engaged and CHIA could “throw the doors open” to expand engagement • Finances to try new things, advance new areas • Executive office staff and resources • Member interest in consumer engagement initiative 	

2. Observations about the HIM Profession and Practice

Board of Directors	CLA Leaders
How have challenges for HIM professionals in California changed over the past 3-5 years?	
<ul style="list-style-type: none"> • Shift to enterprise/corporate structures with overall decrease in director/managerial roles and dissolution of HIM departments • HIM has split into three domains: coding, rev cycle and clinical documentation; IT, data governance and analytics, and; records management including privacy and confidentiality • Number of available positions overall is shrinking, even for experienced professionals • RHIT directors being squeezed out by generalists with advanced degrees; Master’s degree is baseline for managerial roles • HIM roles expanding to include biotech, IT and other health data roles. New graduates are being encouraged to look beyond traditional roles • HIM not as prominent in EHR management • Coders see change coming and are concerned for their jobs • Skill sets changing; technology and applications aptitude is foundational • Entry level positions are not clerical processing skills; today’s entry is a knowledge role 	<ul style="list-style-type: none"> • Centralization of HIM services across health systems has reduced management level roles; a general shrinking of the HIM footprint; HIM is not a department anymore • The HIM Director role is shrinking due to shared services models • Not much out there for HIM anymore, even experienced professionals • Technology enables shared services and this further reduces available positions • The boundaries of HIM are “more opaque” • Professionals having a harder time finding suitable positions; may not be looking at areas such as outpatient

Board of Directors	CLA Leaders
In what areas of practice do you see HIM professionals excelling?	
<ul style="list-style-type: none"> • Coding subject matter experts • Integrity of EHR data • EHR management, particularly regarding legal and compliance requirements • Leading the effort to centralize/standardize IM functions such as release of information across the enterprise • MPI functions • Release of Information, some movement to lead efforts to standardize and centralize across the enterprise 	<ul style="list-style-type: none"> • New graduates are not getting hired, it's more difficult to be properly mentored • Door is opening in ambulatory care but students not focusing in that direction and not selling their generalist health management skills
In what areas of practice are HIM professionals losing ground?	
<ul style="list-style-type: none"> • Privacy is shifting to compliance except in smaller organizations • CDI roles shifting to nursing/case management • Data analytics, QM and other functions that involve working with the data we produce • Regarding HIM approach to change: "half running with the big dogs, half lamenting the changes." • Slow to apply technology to the full range of information management functions • Lack standards for HIM of digital information 	<ul style="list-style-type: none"> • New graduates are not getting hired, it's more difficult to be properly mentored • Not being considered for jobs that are going to those with other degrees. Not selling the knowledge and expertise that we have
What is your greatest concern for the HIM profession in the next 3-5 years?	
<ul style="list-style-type: none"> • Two threads to comments about positioning of HIM field, one external, one internal • <u>External:</u> <ul style="list-style-type: none"> a) Positioning the field for greater success and viability; b) Instead of seeing HIM as a terminal degree, should baccalaureate and master's prepared professionals be positioned as a "a healthcare leader who specializes in HIM" c) People who don't understand HIM, conclude its not essential • <u>Internal</u> <ul style="list-style-type: none"> a) Too many professionals not willing to invest in their own professional future b) To stay viable, professionals need to look for opportunities and sell their skills, overcome passivity • A big unknown: Impact of AI on coding and other HIM functions; pace of technology unclear, but adaptation timelines are short • How are these changes affecting decisions of students to enter the field? • Coming generational shift as baby boomers retire 	<ul style="list-style-type: none"> • "We're not thinking about or clearly stating who we are" • We may not be teaching to the positions that are available • We continue to be poor self-promoters; "is the stem failing us or are we failing to advocate?"

B. e-Survey Findings

(N=181 responses; numbering reflects sequence of statements in e-survey)

Trends relating to HIM Practice

Trend statement	Strongly agree and agree	Greatly impact CHIA	Comment
1. As people become more informed and engaged in their own health and health care, they seek to learn more about how to access, interpret and use their personal health information.	94%	65%	Highest rated trend and impact for CHIA (and HIM) also fairly strong.
2. Compared to five years ago, the age of digital health information has expanded opportunities for qualified HIM professionals in California.	72%	70%	11% disagreed that this trend is creating opportunities for HIM; highest CHIA impact of all trend statements.
3. Health system mergers and acquisitions in California reduce the number of managerial positions for HIM and other health professions.	71%	53%	Response is very consistent with statement 12.
6. The demand for accurate and complete health information is driving greater focus on effective information management and governance.	93%	63%	Second highest ranked trend with strong impact for CHIA.
7. Emphasis on population health improvement is expanding the scope of information management across the delivery system and into the community and the home.	85%	45%	Third highest ranked professional trend, but lower perceived impact on CHIA
9. The HIM field is keeping pace with a sufficient number of professionals academically prepared to fill new knowledge work roles.	39%	60%	Very clear concern about the field keeping pace. And the impact of this on CHIA over the next 5 yrs.
11. Enterprise information management and data/information governance offer opportunities for HIM professionals with the competencies and leadership skills to assume new roles.	80%	52%	Fifth highest trend, but lower perceived impact for CHIA.
12. Compared to five years ago, the competition for positions involving health information management has increased.	73%	56%	See #3; there appears to be concern, but it's not as strong as interview findings. Could relate to respondent sample.
14. HIM is recognized as the preferred professional background for privacy officer roles.	52%	50%	Only 22% of respondents strongly agree, appears to confirm interview findings regarding shift of privacy roles

Trend statement	Strongly agree and agree	Greatly impact CHIA	Comment
15. Technology such as natural language processing and artificial intelligence is changing HIM work such as coding, data management	84%	63%	Fourth highest ranked trend with strong impact for CHIA

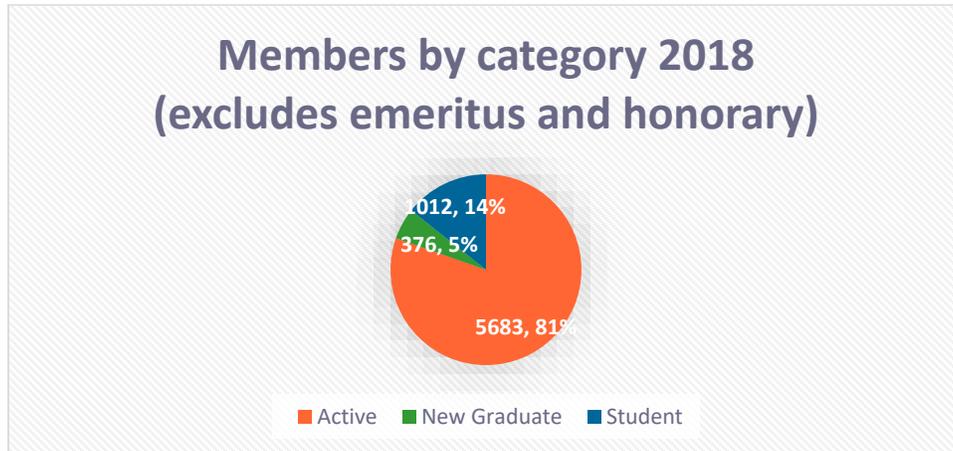
Trends relating to Associations

Trend statement	Strongly agree and agree	Greatly impact CHIA	Comment
4. Web resources have largely replaced print and textbook resources as the first route for researching professional practice questions	93%	56%	Underscores importance of web over print
5. A key value of CHIA is that it is a trusted source of information and education	93%	59%	Strong confirmation of key CHIA value proposition
8. There is greater competition for limited employer education dollars and it is harder to take time off for education and to pay for it personally	82%	62%	
10. The value of CHIA as a vehicle for professional networking has increased in importance in professional practice and in job seeking	68%	46%	Relatively weak agreement given the importance of networking in interviews
13. CHIA and other professional associations are modernizing how they use technology to deliver services with greater flexibility	80%	58%	

C. Data on CHIA Today

1. Membership

- Membership totals around 7,250 on January 1, 2018. There are over 9,000 AHIMA credential holders in California.

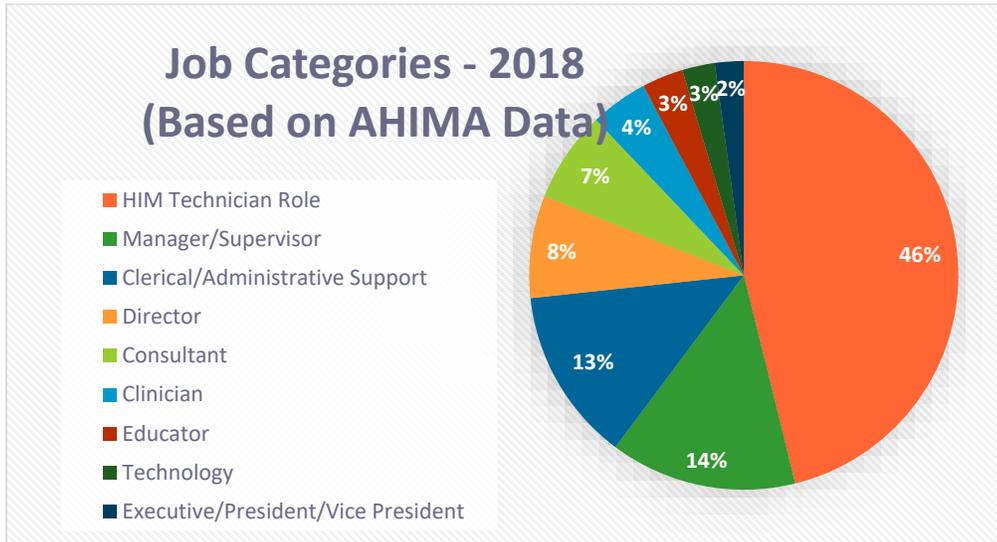


- About one-third of members support CHIA through state dues. Over the past five years, the proportion of AHIMA members in CA who are also dues paying CHIA members is diverging.

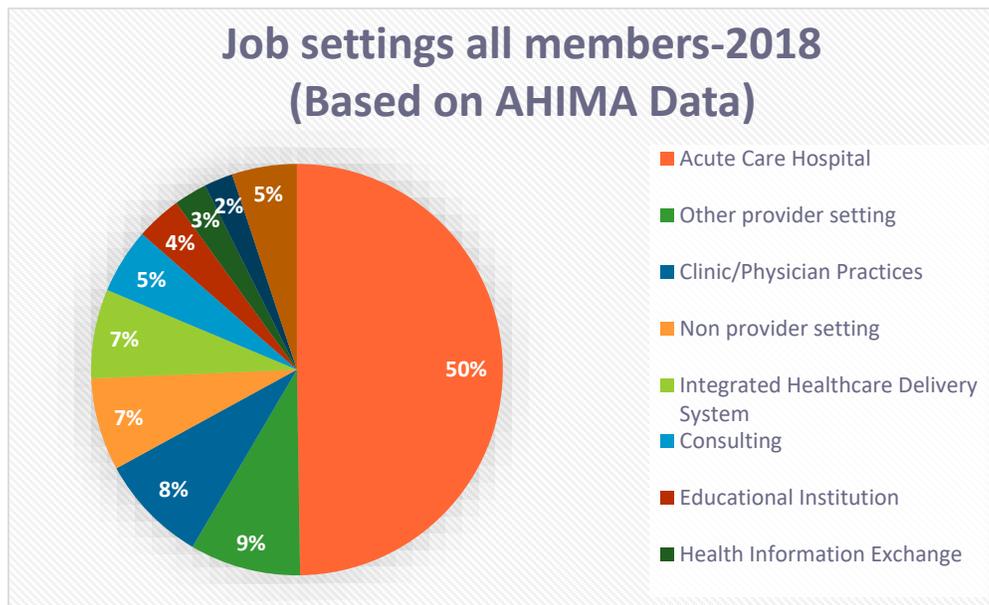


2. Member Profile

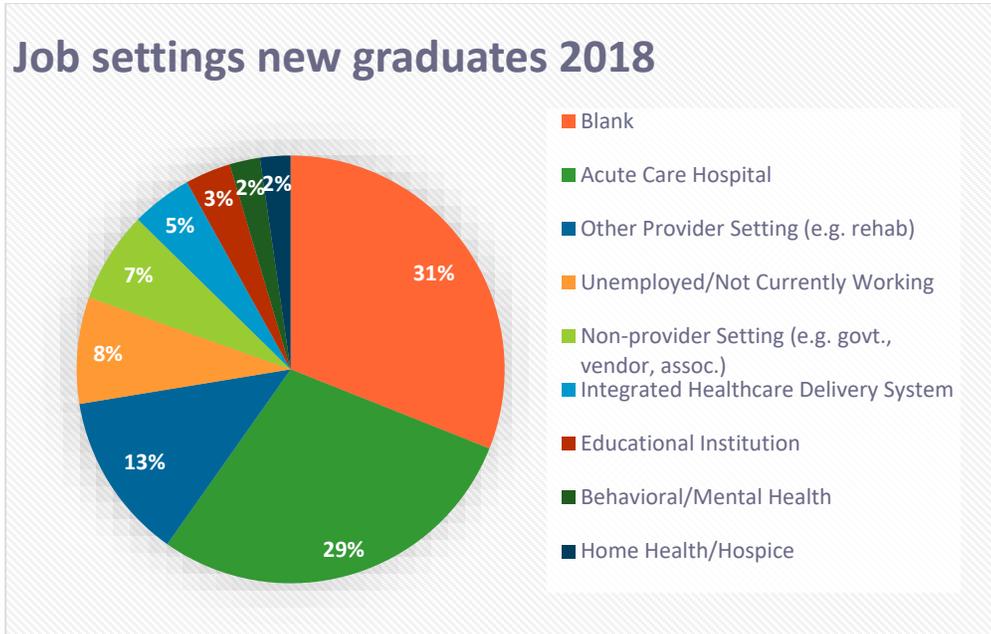
About 60% of CA members are in technical and clerical/administrative jobs. Members in managerial positions comprise approximately 30%.



- About 75% of CA members work in patient care settings, hospitals, clinics and other provider settings.

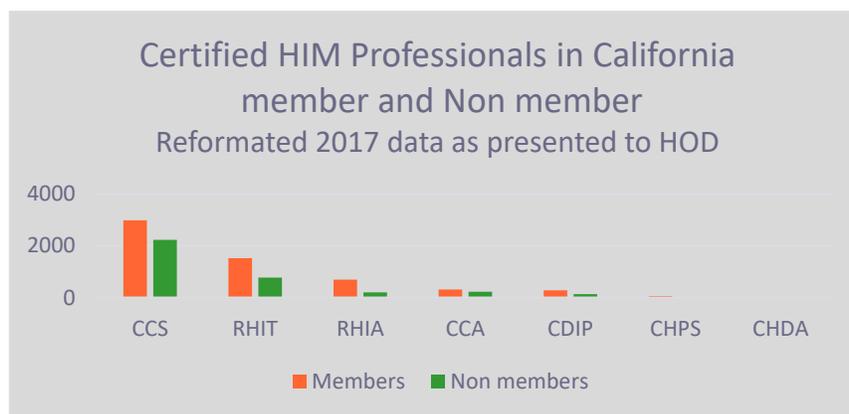


- While a limited data set (381) nearly 40% of new grads are unemployed or not declaring a work setting; employed graduates generally less acute care-based.

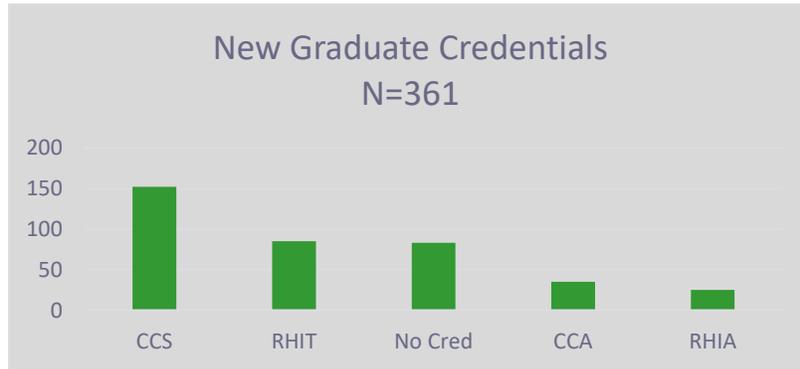


3. Certification and Career Stage

- Credentials align with job categories, with 51% of CHIA members holding a CCS credential, 26% holding an RHIT credential and 12% holding an RHIA credential. 62% of credentialed non-members are CCSs (Over 2,000 of the 3,500+ credentialed non-members), 22% are RHITs and 6% RHIAAs.



- Credentials of new graduates follow the member/nonmember frequency; the no credential group is significant and these individuals may be lost to membership and certification.



- Approximately half of AHIMA Members in CA have been in the field less than 10 years (48%) and 11 years or over (52%).



Appendix 2

California Health Information Association Strategic Planning for 2020-2022 January 11-12, 2019

Meeting Goals

- Understand the board’s role in strategy development and strategy management.
- Update, as needed, CHIA’s key directional statements of Vision, Mission and Values.
- Understand current challenges for professional associations and their implications for CHIA.
- Identify current challenges impacting the practice and profession of HIM and the implications for CHIA.
- Draft strategic priorities for 2020-2022 including desired outcomes and measures.
- Identify ways that CHIA needs to change to ensure flexibility to adapt, perform, and be impactful on behalf of its members and the industry they serve.

Friday, January 11

Board of Directors Meeting

8:30 am – 12:30 pm	Board business meeting
12:30 pm– 1:30 pm	Lunch Break
1:30 pm– 5:00 pm	Governance and Strategy <ul style="list-style-type: none"> • Reflecting on best Board practices in setting direction • Review and Update of CHIA’s Mission, Vision and Values • Review and Update of CHIA Stakeholder Value Statements

Friday, January 11

Board of Directors and CLA Leaders

7:30 – 9:00 pm	Strategic Planning Kick off
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Saturday, January 12

Board of Directors and CLA Leaders

7:30 – 8:30 am	Breakfast
8:30 am – 9:00 am	Overview of the planning process
9:00 am – 9:30 am	Discussion on Environmental Scan data summary

9:30 am – 10:00 am	Report out from Board’s work on Vision, Mission, Values and Stakeholder Values
10:00-Noon	Breakout group work: Prioritize and refine “candidate” strategies for 2020-2022 to deliver on stakeholder needs (Includes 30 minutes of report out and group determined break)
Noon – 12:45 pm	Lunch break
12:45 pm – 1:45 pm	Breakout group work: Define desired 2022 outcomes for highest priority candidate strategies (includes 30 minutes of report out).
1:45 pm – 3:00 pm	Breakout group work: Organizing for Impact: construct a high level “picture” of CHIA in the future (including 30 min report out).
3:00 pm – 3:15 pm	Break
3:15 pm– 4:00 pm	Aligning high priority strategies with desirable CHIA organizational features.
4:00 pm – 4:30 pm	What comes next? <ul style="list-style-type: none"> • Work plan • Communication plan

Strategic Planning Retreat Attendees	
Sadie Albonico	SVHIA President-elect
Maria Alizondo	CHIA President
Nancy Andersen	CHIA President-elect
Roberta Baranda	SHIA Past President
Adrienne Beauvois	SCHIA President
Debi Boynton	CHIA Finance & Operations Manager
Kamar Braish	GOCHIA President
Brian Faust	CHIA Past President
Rachael Goodman	CHIA Graduate Member
Keith Haas	SDHIA President-elect
Linda Kloss	Kloss Strategic Advisors, Ltd
Sharon Lewis	CHIA CEO/Executive Director
Canikah Lockett	CHIA Student Member
Melany Merryman	CHIA Director
Adriana Preciado	IAHIA President-elect
Diane Premeau	CHIA Director
Connie Renda	CHIA Director
Freida Smith	NCHIA President
Larry Smith	CHIA Director

Friday evening strategic planning ice-breaker

Goals:

- Team building – bring the board and CLA leaders together
- Help participants shape and own the results of Saturday’s work

Exercise 1: Tell me something I don’t know (about 30 minutes)

- Each member of the group will introduce someone else from the group that they don’t usually work with.
- They will interview the other person and provide 1 minute of who they are/what they do facts and then tell us all something about the person that is unique and memorable (recent travel, family circumstance, interesting hobby, or something serious such as illness recovery)

Exercise 2: What will make our work tomorrow have great value to CHIA (about 30 minutes)

- Discuss the following question as a group of 4 and share your top three with the whole group

“When I drive out of here after tomorrow’s meeting, I will feel really good about having invested my Saturday IF we are able to