



# MGMA STATE STRATEGY

STATE TOWN HALL MEETING |  
JULY 2023



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## THE GOAL:

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The goal is to rethink and redefine the National/State relationship so each can leverage their strengths, maximize their resources, and better position themselves to demonstrate a unique and compelling value proposition to members.

## STATE BENCHMARK REPORT



### Financial Benchmark – American Society of Association Executives (ASAE)

<b>Financial Stability Ratio: Expendable Fund Balance/Total Expenses</b>	<b># of Orgs</b>	<b>Median</b>	<b>Mean</b>	<b>25th %</b>	<b>75th %</b>
<b>&gt;200k</b>	34	1.61	1.79	0.71	2.38
<b>200-500k</b>	180	0.89	1.32	0.49	1.55

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### Engagement Benchmark - Points awarded for meeting all core benefits

- Interactive education (12 hour minimum)
- Monthly digital resource
- Online networking
- Job postings
- Website
- Regulatory/Legislative advocacy updates (minimum of quarterly)

### Membership Benchmark

OVERALL MEMBERSHIP RENEWAL RATE				
	Total (n = 549)	IMO (n = 222)	Trade (n = 167)	Combination (n = 156)
➕ Mean	82%	79%	88%	79%
📊 Median	84%	81%	89%	83%
⬅️ Less than 80%	36%	46%	19%	42%
➡️ 80% or more	64%	54%	81%	58%

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### New Members = Points awarded for any new members

# STATE BENCHMARK REPORTS



State: <b>Example State</b>							
2023 Based on 2022 Data							
Key Performance Indicator (KPI)	Benchmark	State Result	Percentage	State Points	State Rating		
<b>Financial (40 pts)</b>							
Financial Stability Ratio: Expendable Fund Balance/Total Expenses	.89 (200-500K in revenue) <b>OR</b> 1.61 (>200K in revenue)	1.18	73%	29			
<b>Membership (50 pts)</b>							
Active Member Retention % (40 pts)	79% + = 40	76%	96%	38			
Active Member Growth (10 pts)	Yes = 10	Yes		10			
	No = 0						
<b>Engagement (10 pts)</b>							
Met all core benefits outlined in affiliation agreement	Yes = 10 No = 0	Yes		10			
	<b>Total Points and Overall Rating</b>			<b>88</b>			
						<b>Total Points and Overall Rating Scale</b>	
						85+	
						65 - 84	
						< 65	
<b>Definitions</b>							
<b>Key Performance Indicators (KPI)</b> = measurement used for benchmark							
<b>Benchmark</b> = Measurement of industry success based on KPI							
<b>State Result</b> = Your state's results using your state matrix reported information and KPI measures							
<b>Percentage</b> = Percent difference between state result and benchmark. <i>Example Active Mem Retention: State result .75 / benchmark .79 = 0.9</i>							
<b>State Points</b> = Number of state points based on percentage. <i>Example Active Mem Retention: .95 Percentage x 40 points possible = 38 points</i>							

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# NATIONAL MGMA 2022 KPI BENCHMARKING REPORT



Nat'l MGMA 2023 Based on 2022 Data					
Key Performance Indicator	Benchmark	National Ratio	Percentage	Points	Rating
<b>Financial (40 pts)</b>					
Financial Stability Ratio: Expendable Fund Balance/Total Expenses	.62 (\$25-50M in revenue)	1.9	100%	40	
<b>Membership (50 pts)</b>					
Active Member Retention % (40 pts)	79% + = 40	79%	100%	40	
Active Member Growth (10 pts)	Yes = 10 No = 0	10		10	
<b>Engagement (10 pts)</b>					
Met all core benefits outlined in affiliation agreement	Yes = 10 No = 0	10		10	
<b>Total Points and Overall Rating</b>				<b>100</b>	
					<b>Total Points and Overall Rating Scale</b>
					85+
					65 - 84
					< 65
<b>Definitions</b>					
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# STATE MODEL OPTIONS



**PARTNER  
AFFILIATE**

*OR*

**CHAPTER**

- Options give each state the opportunity to pick the model that works best for the state and their constituents.
- Implementation of required Performance Metrics and Benchmarks will provide ongoing visibility into state performance and allow MGMA to intervene earlier to provide support and prevent possible dissolution of states not meeting benchmarks.
- Both options will require a higher level of alignment and collaboration between MGMA and the states with the ultimate goal of leveraging the unique strengths of each and providing increased value to members.
- ILMGMA pilot demonstrated the ROI of greater alignment, collaboration and administrative support between MGMA and states.

- Required to offer Dual Membership (IM & OM) product in addition to state-only membership.
  - Simplified administrative/purchasing experience for members
  - Offering dual membership (IM & OM) in all MGMA states provides consistency in product offerings and value to all members
- Option to participate in Regional Spring Conferences
  - Regional Spring Conference participation is not required; states can continue to offer standalone state conferences
  - States bear no downside liability for participation in regional conferences; includes revenue share for registration and exhibits & sponsorships
  - States can continue to sponsor other state specific f2f events; i.e. Payor Days, Networking events, Legislative Days, Lunch & Learns, etc.
- Required participation in annual State Matrix including KPI reporting

## MAJOR COMPONENTS OF CHAPTER:

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- State will become a subsidiary of MGMA. State will maintain corporate identity, corporate structure, etc. Transition will involve an amendment to the Articles of Incorporation and Bylaws making MGMA a voting member.
- MGMA bears financial risk and financial management responsibility and collaborates with state leadership on strategic planning
- Maintains state leadership and strengthens state leaders' ability to focus on serving the mission & core values of the state association – membership growth & retention, local networking opportunities/events, development of state/regional content, local advocacy efforts, jobs/job postings, etc.
- Association management services will be outsourced through contractual relationships. State leadership will have input into selection process and contracts will be held by MGMA.
- As with Partner Affiliate agreement, chapter will offer Dual Membership (IM & OM) products as options. State-only and national-only membership products will still be offered.
- Chapters will participate in regional conferences (if offered in their region) and states can continue to sponsor other state specific f2f events; i.e. Payor Days, Networking events, Legislative Days, Lunch & Learns, etc.



# STATE STRATEGY COMPONENT PLANNING

## STATE PARTNER AFFILIATE

### PARTNER AFFILIATE & TRADEMARK LICENSING AGREEMENT

- State maintains state identity/branding
- Defined core benefits to be offered at state level
- Defined annual KPI reporting requirements and scoring benchmarks
- Aligned key membership categories
- Participation in Dual Membership products
- Option for states not meeting baseline benchmarks to improve areas of deficiency within a defined right to cure period.
- Any state may elect the option to transition to a chapter regardless of KPI scores.
- Option to participate in regional conferences with revenue share opportunities

### MEMBERSHIP MODEL

- Dual membership product offerings (IM and OM) required
- State only and national only memberships can still be purchased
- NEW Dual Organizational membership product included
  - Sold by National sales team as an upsell to National OM product
  - One flat fee for state membership for all National OM tiers (up to 50 individuals; over 50 charged \$50.00 per individual. Reconciled annually at renewal.
  - 75% revenue allocation to state/25% to National
  - National Tier 1 OMs (1-6 physician FTEs) offered state membership at no additional cost. National will pay flat fee to state
- All dual membership purchases made through National. Biweekly EFT and membership reporting to states.

## STATE CHAPTER

### SUBSIDIARY OF MGMA

- State maintains state identity/branding
- Defined core benefits to be offered at state level
- Defined annual KPI reporting requirements and scoring benchmarks
- Aligned key membership categories
- Participation in Dual Membership products
- Legal and Accounting/Finance consultants defining processes for chapter transition
- State volunteers continue to play key leadership roles in governance, membership, content/benefits, conferences
- Participation in regional conferences
- Administrative and financial responsibilities assumed by National and resourced through outsourced management company/staff.

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# STATE STRATEGY COMPONENT PLANNING

## STATE PARTNER AFFILIATE

## STATE CHAPTER

### EDUCATIONAL CONTENT

- Collaboration among MGMA staff, state MSOs, and state volunteers
- Inclusion of links to curated MGMA podcasts and webinars
- Ability to share Washington Connection with state members
- Recommendations for early careerists/student offerings and event listings
- State-specific data analysis reports and sharing of relevant national resources
- Annual report featuring specific data points for each state to support member acquisition
- Available MGMA Stat articles to utilize at the state level
- Curated resources available from the MGMA national advocacy team
- Recommendations for volunteer opportunities for content creation, legislative affairs, and payer content committees or advisory roles

### EDUCATIONAL CONTENT

- All State Partner Affiliate offerings with following additions:
- Flexibly scheduled webinars exclusively available to chapters with collaborative curation by MGMA staff, state MSOs, and state volunteers
- Assistance with the development of a master calendar and provision of registration and speaker contract templates by MGMA National
- Establishment of standardized pricing for non-members
- Seamless facilitation and platform management by MGMA staff, state MSOs, and state volunteers
- Assist with the collaboration within the medical practice management community at the state level
- Content calendar aligned with monthly themes based on the Body of Knowledge (BOK) and current trends

### GOVERNMENT AFFAIRS/ADVOCACY

- *GA staff provides digital speaking options at state only events*
- Continue Legislative Liaison structure with quarterly meetings

### GOVERNMENT AFFAIRS/ADVOCACY

- GA staff speaks in-person at regional conferences only
- Continue Legislative Liaison structure with quarterly meetings

### DATA

- Webinar demonstration providing state leaders and state staff overview of MGMA surveys and DataDive
- Defined resources and support to promote MGMA surveys
- Customized report for state members comparing practice data against MGMA benchmarking data

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# STATE STRATEGY COMPONENT PLANNING

## STATE PARTNER AFFILIATE

### CONFERENCE STRATEGY

- *Option of standalone spring and/or fall state conference or participation in regional conferences*
- Standardized format for each regional conference offering both national and state content & networking
- Registration and Exhibitor/Sponsor revenue share for participating states
- States encouraged to continue to offer local f2f networking/social events, lunch & learns, payer days, legislative days, etc.

### CONFERENCE CONTENT

- For Partner Affiliates electing to participate in Regional Conferences:
- Establish a regional volunteer conference content advisory group to determine the topics that should be included in the Call for Proposals (CFP).
- National MGMA manages the CFP process.
- Regional volunteer group helps promote the CFP.
- Regional volunteer group reviews session abstracts.
- National MGMA is responsible for final session selection.
- One GA and one MGMA Data/Benchmarking session led by National MGMA staff will be included in each spring conference.
- National MGMA manages entire speaker engagement process.
- National MGMA will choose and contract Keynote Speakers.
- The regional volunteer conference content advisory group works to plan state or regional networking events held in conjunction with regional conferences.
- Sponsored Content will be contracted and managed by National MGMA.

## STATE CHAPTER

### CONFERENCE STRATEGY

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# STATE PARTNER COMPONENT PLANNING

## STATE PARTNER AFFILIATE

### EXHIBITS & SPONSORSHIPS

- *For Partner Affiliates electing to participate in Regional Conferences:*
- At each Regional Conference, anticipated attendance of 350 to 400 attendees and 35 – 45 10x10 exhibit booths
  - Member (national or state) and non-member pricing
- Possible limited tabletop opportunities
- Sponsorships ranging from specific state and regional to full national sponsors
  - Speaking sessions
  - Happy hours, newsletter call outs, event and welcome etc.
  - Pricing from \$500 to more than \$12,000
- Revenue share on booths and sponsorships
- Exhibit booths and sponsorships to state only events (conferences, payer days, lunch & learns, etc.) will be sold and managed by states and revenue retained by states

### CAREER CENTER/JOB BOARD

- Offer of a career center microsite buildout
- Two tier pricing structure
  - State only posting
  - State with National upgrade
- Revenue share with states for state only/state with National upgrade job postings
- Benefits:
  - Partner builds fully functionally job site
  - Partner handles marketing for seekers
  - Partner assists in accounting
  - MGMA National provides Job Seeker and Job Poster resources

## STATE CHAPTER

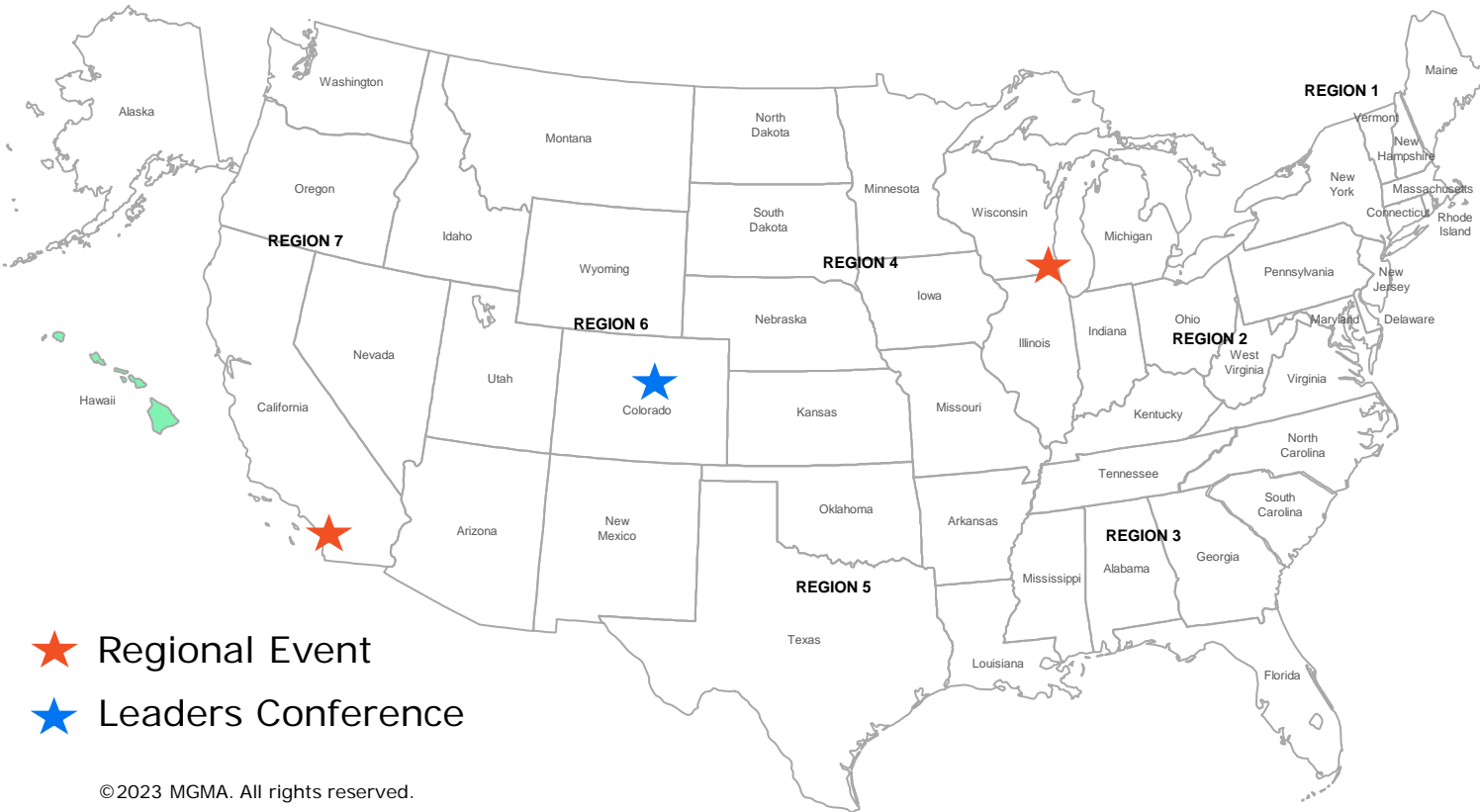
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  - Pricing from \$500 to more than \$12,000
- Revenue share on booths and sponsorships
- Exhibit booths and sponsorships to state only events (payer days, lunch & learns, etc.) will be sold and managed by states and revenue allocated to state budget

### CAREER CENTER/JOB BOARD

- Included microsite for each state chapter with focus on local management/staff job postings.
- Two tier pricing structure
  - State only posting
  - State with National upgrade
- Revenue share for state only/state with National upgrade job postings.
- Benefits:
  - Partner builds fully functionally job site
  - Partner handles marketing for seekers
  - Partner assists in accounting
  - MGMA National provides Job Seeker and Job Poster

# 2024 CONFERENCE PLAN



- ★ Regional Event
- ★ Leaders Conference

Local functions & days as planned, for both chapters & affiliates

Regional events (Ops/Fin) expanded and include state content

Leaders re-positioned



# THANK YOU



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