

HFMA Regional Executive Position Description & Competencies

Term of Office: Three years

Role

The Regional Executive is a key volunteer leadership position that exists to:

- Serve as the primary volunteer leader between volunteers at the local level and the Association
- Assist chapter leaders in serving members
- Promote and lead change efforts to drive HFMA’s strategies
- Foster dialogue and communication at all levels of HFMA
- Represent the needs and interests of chapter leaders at the Regional Executive Council and to the HFMA National Board and staff
- Work to create a seamless system of service
- Encourage chapters to collaborate and help other chapters

The term is for three years starting as incoming Regional Executive-elect (RE3), incoming Regional Executive (RE2), and Regional Executive (RE). It is critical that all three roles within the region work to establish effective communication, collaboration, and coordination to assist chapter leaders in serving member needs.

Qualifications and Competencies

The successful Regional Executive must be able to:

- View issues from multiple perspectives in order to meet the needs of the HFMA member
- Understand and support the strategies set by the National Board to meet member needs
- Communicate the opportunities and challenges in executing those strategies at the chapter level
- Assess past performance and recommend ways to support continued good performance or identify areas for improvement
- Think strategically, build relationships and consensus among chapter leaders, encourage collaboration across chapters
- Strong listening and communication skills
- Experience facilitating meetings and building teams
- Good time management skills
- Experience leading change management efforts is highly desired
- Previous service as chapter president
- FHFMA/CHFP certification preferred

Responsibilities

Regional Executive	Regional Executive 2	Regional Executive 3
Regional Executive Council: set policy and goals related to the Davis Chapter Management System, Dashboard Elements, Success Awards, and Founders Merit Award Program.		
<ul style="list-style-type: none"> • Attend Council meetings as the voting member for the region • Mentor Regional Executive 2 and 3 	<ul style="list-style-type: none"> • Attend in-person meetings as allowed by Regional Operating Agreement (ROA) or national policy (see meeting attendance below) • Attend virtual meetings of the REC • Mentor Regional Executive 3 	<ul style="list-style-type: none"> • Attend in-person meetings as allowed by ROA or national policy (see meeting attendance below) • Attend virtual meetings of the REC

Regional Operating Agreement: conduct yearly review of regional operating agreements to ensure they are adhered to and updated.		
<ul style="list-style-type: none"> Lead discussion to approve ROA 	<ul style="list-style-type: none"> Gather input from chapter leaders 	
Regional Executive Nomination Process: solicit nominations, review qualifications, interview prospective RE's and carry out election process		
<ul style="list-style-type: none"> Solicit nominations Interview candidates for RE3 Facilitate discussion and election of incoming RE3 	<ul style="list-style-type: none"> Solicit nominations Interview candidates for RE3 Coordinate candidate interviews with RE team and other chapter leaders as needed 	<ul style="list-style-type: none"> Solicit nominations Review qualifications of applicants
Chapters: Serve as primary liaison between chapter leaders and the Association		
<ul style="list-style-type: none"> Lead at least monthly conference calls with chapter presidents and presidents-elect Work with RE2 to coordinate travel to chapter meetings per ROA As necessary, work with chapter leaders if a Chapter Advancement Plan is needed 	<ul style="list-style-type: none"> Develop agenda for monthly conference calls with chapter presidents and presidents-elect Work with RE to coordinate travel to chapter meetings per ROA 	<ul style="list-style-type: none"> Participate in monthly conference calls with REs and chapter presidents and presidents-elect Where possible, attend chapter meetings with the RE and RE2 per ROA

Meetings

Regional Executives II and III should review RE Council meeting agendas and provide input/feedback to the Regional Executive prior to meetings. This is of particular importance for the November Council meeting where the DCMS policy and other Chapter requirements will be discussed and set for the following year. Ideally, the three Regional Executives should hold a conference call prior to the in-person meetings to discuss agendas and provide input.

Attendance at any meetings noted as “Highly Recommended” will need to be paid for by chapter or regional treasuries.

Regional Executive	Regional Executive 2	Regional Executive 3
Annual Conference		
<ul style="list-style-type: none"> Attend RE Council meeting 	<ul style="list-style-type: none"> Highly Recommended – Attend RE Council meeting 	<ul style="list-style-type: none"> Highly Recommended – Attend RE Council meeting
Volunteer Leadership Meeting		
<ul style="list-style-type: none"> Solicit chapter leaders and REs to identify regional agenda items. Lead the meeting 	<ul style="list-style-type: none"> Circulate ROA to chapter leaders to review prior to meeting. Take notes 	<ul style="list-style-type: none"> Coordinate dinners and outings
Regional Executive Council Meeting – November		
<ul style="list-style-type: none"> Attend RE Council meeting 	<ul style="list-style-type: none"> Highly Recommended – Attend RE Council meeting 	<ul style="list-style-type: none"> Highly Recommended – Attend RE Council meeting
Leadership Training Conference		

<ul style="list-style-type: none"> Attend Regional Executive Council meeting. 	<ul style="list-style-type: none"> Attend Regional Executive orientation Attend RE Council Meeting Lead Regional Planning time Attend LTC training to connect with incoming chapter leaders 	<ul style="list-style-type: none"> Highly Recommended - Attend Regional Executive orientation Attend RE Council Meeting Attend Regional Planning time Attend LTC training to connect with incoming chapter leaders
Regional Executive Council Virtual Meetings		
<ul style="list-style-type: none"> Attend meetings 	<ul style="list-style-type: none"> Attend meetings 	<ul style="list-style-type: none"> Attend meetings

- (1) It is expected that the Regional Executive will attend all meetings. In the event the Regional Executive is unable to attend, the Regional Executive may appoint that region's Regional Executive 2 to serve as his/her voting delegate to the Council meeting. The Regional Executive must inform the Regional Executive Council Chair he/she is sending a delegate to the Council meeting.
- (2) It is recommended that during the November Council meeting when the DCMS policy and other Chapter requirements are reviewed for the next year, the Regional Executive and the Regional Executive 2 work together to identify their regional recommendations and that the Council ask for a regional vote vs. a Regional Executive vote on the metrics.

Selection Process

- Individuals interested in becoming a Regional Executive are required to apply for the position and document experience that demonstrates necessary qualifications and competencies.
- The Regional Executives will solicit nominations from chapter leaders.
- The Regional Executive and Regional Executive 2 will interview qualified individuals and make recommendations to chapter presidents-elect. Regions may choose to have additional interviews performed by other chapter/regional volunteer leaders.
- Regional Executives are elected by chapter presidents-elect no later than during the LTC held in the year prior to their term of office as Regional Executive 3.
- Chapters may not have members serve in the Regional Executive rotation in consecutive terms to ensure equitable distribution across the chapters (i.e. Chapter X may not have a member as RE and RE2 but could have someone in the RE and RE3 role).

Approved: Board of Directors, November 14, 2016 and April 17, 2023