

Job Description Templates

JOB DESCRIPTION **CHAPTER PRESIDENT**

General Description:

The President is the chapter's chief operating officer and generally responsible for managing all chapter activities and for the overall operation of the chapter. He/She shall work to ensure member needs are addressed and that a high-quality level of activity is maintained.

Term:

One Year

Time Commitment:

XX hours/year average or XX hours/month average

Goals, Objectives, and Responsibilities:

- Develop goals and objectives of the chapter and each committee in conjunction with the Board of Directors and committee members. Document these goals and objectives in the chapter's operating manuals. Distribute copies of this manual to the Board members and officers.
- Develop overall chapter organizational structure and publish in Officer Manual.
- Work with chapter committees on an as-needed basis to facilitate achievement of goals and objectives.
- Preside at all board meeting and chapter committee meetings and report pertinent information to the membership.
- Act as the chapter liaison with the region, Regional Executive, and other related healthcare organizations.
- Hold at least four Board meetings during the year.
- Review and revise the chapter bylaws as necessary.
- Coordinate all chapter activities with HFMA Association activities and objectives.
- Attend leadership meetings coordinated by HFMA Association as required.
- Add other duties or responsibilities specific to your chapter.

**JOB DESCRIPTION
CHAPTER PRESIDENT-ELECT**

General Description:

The President-elect shall provide support and assistance to the operation of the chapter. The President-elect acts in the capacity of the President when he/she is unable to be present. The President-elect is delegated responsibility by the President at his/her discretion.

Term:

One Year

Time Commitment:

XX hours/year average or XX hours/month average

Goals, Objectives, and Responsibilities:

- Assist in selection of committee members for all chapter committees.
- Coordinate the chapter's planning and goal-setting process.
- Conduct planning meeting for the upcoming year.
- Attend leadership meetings coordinated by HFMA Association as required.
- Attend all meetings that the President is unable to attend with his/her proxy, as necessary.
- Add other duties or responsibilities specific to your chapter.

JOB DESCRIPTION CHAPTER SECRETARY

General Description:

The Secretary is responsible for maintaining all chapter records of meetings and communicating that data to the appropriate members and other interested individuals. The Secretary is also responsible for attending and maintaining all Board Meeting minutes.

Term:

One Year

Time Commitment:

XX hours/year average or XX hours/month average

Goals, Objectives, and Responsibilities:

- Attend Board meetings and develop/maintain Board minutes.
- Attend chapter strategic planning session.
- Add other duties or responsibilities specific to your chapter.

JOB DESCRIPTION

CHAPTER TREASURER

General Description:

The Treasurer is responsible for overseeing the financial management of the chapter. Activities include the development of an annual budget, maintaining control and accountability over revenues and expenditures, and financial reporting to the Board. The Treasurer is responsible for the safekeeping, recording, and disbursement of all chapter funds in accordance with established fiscal policy, Board direction, and the annual operating budget. The Treasurer is also responsible for attending all Board meetings and for reporting all requested financial information to HFMA National.

Term:

One Year

Time Commitment:

XX hours/year average or XX hours/month average

Goals, Objectives, and Responsibilities:

- Keep chapter Board of Directors informed of current financial position.
- Refer to the *Finance Operations* page on the Chapter Resource Center for information on due dates, training, and forms to complete.
- DCMS Reporting for Chapter Treasurers:
 - Chapters are required to develop an annual operating budget and submit it to HFMA National by June 1.
 - Chapters are required to conduct a financial review to test and validate their fiscal integrity and operating guidelines and submit it to HFMA National by August 1.
 - Chapters are required to submit the financial information for IRS Form 990 to HFMA National by August 1.
 - The HFMA National Board requires that each HFMA chapter certify their organizational structure — Certification of Chapter Organization. Validate and send to HFMA National by August 1
- Maintain records in accordance with generally accepted accounting principles on an accrual basis as directed by HFMA National.
- Review and/or establish clear financial policies and procedures and chart of accounts.
- Retain chapter financial records as required by HFMA National.
- Establish a chapter checking account and obtain appropriate signature cards and resolutions in an appropriate institution per chapter policy.
- Maintain chapter certificates of deposit or other investment vehicles and reinvest as directed by the Board of Directors.

CHAPTER TREASURER (cont'd)

- Issue all checks for approved budgeted expenditures and/or any exceptions approved by the Board and mail to the president for approval and signature on a timely basis.
- Ensure that all expenditures are approved and verified prior to payment.
- Ensure that all receipts and disbursements are recorded consistent with the appropriate accounting conventions currently in practice.
- Ensure that all deposits are made on a timely basis with appropriate back-up and receipt.
- Provide appropriate assistance to the annual audit process.
- Ensure that appropriate information is submitted to HFMA National for reporting on a timely basis.
- Prepare and deliver a Financial Report at each Board of Directors meeting.
- Advise the Board as to appropriate investment options as excess funds become available.
- Ensure that the treasurer is appropriately bonded.
- Have the checkbook available at all quarterly meetings for disbursements.
- Deliver all accounting records in appropriate, balanced order to the incoming treasurer.
- Add other duties or responsibilities specific to your chapter.

JOB DESCRIPTION PROGRAM CHAIR/COMMITTEE

General Description:

The Education/Program Committee is responsible for developing and coordinating all chapter educational sessions, including program content, speakers, attendee registration, site arrangements and payment, and meeting follow-up. The Education/Program Committee will include a Chairperson and at least XX other committee members.

Term:

One Year

Time Commitment:

XX hours/year average or XX hours/month average

Goals, Objectives, and Responsibilities:

- Provide tentative educational program schedule to the Board with proposed dates and topics by (DEADLINE).
- Establish committee goals, which may include: net program income, member and total attendance, and member educational hours. Establish a monitoring system and report results to Board.
- Develop and coordinate the chapter's educational sessions during the year on a variety of topics to meet the members' needs.
- Ensure that appropriate information is reported to HFMA National on a timely basis.
- Add other duties or responsibilities specific to your chapter.

JOB DESCRIPTION MEMBERSHIP CHAIR/COMMITTEE

General Description:

The Membership Committee is responsible for building and maintaining the chapter's membership. The committee will coordinate the chapter's membership campaign to fulfill the chapter's goal of new and retained members for the upcoming year. The Membership Committee will include a Chairperson and at least XX other committee members.

Term:

One Year

Time Commitment:

XX hours/year average or XX hours/month average

Goals, Objectives, and Responsibilities:

- Develop and maintain process to identify new members through the educational sessions and chapter newsletter. Contact each potential candidate at least once during the year for possible membership.
- Develop and maintain process to reinstate lapsed members. Contact each lapsed member at least once during the year for possible renewal.
- Work with appropriate Board member to identify at least XX healthcare-related organizations to promote membership and the chapter.
- Contact at least XX colleges and inquire about potential healthcare-related classes and the ability to recruit student members.
- Develop a year-end summary of activities and objectives for the current year.
- Add other duties or responsibilities specific to your chapter.

JOB DESCRIPTION COMMUNICATIONS CHAIR/COMMITTEE

General Description:

The Communications Committee is responsible for the coordination and publication of information for chapter members. The Chairperson will ensure the communications are timely and cover a variety of mediums. The Communications committee will include a Chairperson and at least XX other committee members.

Term:

One Year

Time Commitment:

XX hours/year average or XX hours/month average

Goals, Objectives, and Responsibilities:

- Ensure chapter adherence to HFMA brand guidelines and communication standards.
- Coordinate with sponsorship, programs/education, certification, and any other committees to promote initiatives.
- Maintain the chapter website and audit on a monthly basis for updates.
- Manage social media platforms (including but not limited to Facebook, LinkedIn, Twitter, and YouTube), develop content schedule, and oversee content production.
- Ensure that appropriate information is reported to HFMA National on a timely basis.
- Add other duties or responsibilities specific to your chapter.

JOB DESCRIPTION CERTIFICATION CONTACT

General Description:

The chapter Certification Contact is the chapter's primary point of contact for certification information. He/she is responsible for ensuring the chapter makes information about certification available to members. Ideally, the Certification Contact would be a certified member or someone who is interested in becoming certified.

Term:

One year

Time Commitment:

+/- 5 hours per month average

Goals, Objectives, and Responsibilities:

- Develops and maintains processes to encourage members to become certified and to encourage them to maintain their certifications once they are earned.
- Works within the chapter to offer appropriate resources in support of certification for the chapter. Such resources can include study groups and group overviews of certification requirements and ways to prepare for certification.
- Add other duties or responsibilities specific to your chapter.

JOB DESCRIPTION BOARD OF DIRECTORS

General Description:

The Board of Directors functions as the chief governing body of the chapter. Board members shall have authority and responsibility for supervising the general operation of the chapter in the furtherance of its stated purpose, mission, and goals. Each Board Member is directly accountable to the President of the Board for performance of the stated duties.

Term:

One Year

Time Commitment:

XX hours/year average or XX hours/month average

Goals, Objectives, and Responsibilities:

- Attends all regular and special meetings of the Board of Directors and the membership, and notifies the President if unable to attend.
- Participates in the formulation of the chapter's strategic and/or short- and long-range plans including annual goals and objectives.
- Contributes to the development, approval, and monitoring of the chapter's annual budget.
- Evaluates chapter policies and programs on a regular basis and makes appropriate recommendations.
- Brings member issues and concerns to the attention of the Board of Directors for consideration and action.
- May chair a committee or special task force and/or serve as a member of, or liaison to, at least one committee, as assigned by the President and/or Board of Directors.
- Performs any other non-specified duties necessary to further the business of the chapter as duly authorized by President and/or Board of Directors.