



## REGIONAL EXECUTIVE ACTIVITIES

### Incoming RE (or RE2)

#### January 2023

January 18	January 2023 Leadership Connection Call – 2-3 p.m. CT.
January 25	Regional Executive meeting (virtual)
Pres/PE Call	<ul style="list-style-type: none"><li>Confirm President-Elects have sent Leadership Training Conference (LTC) information to their leaders (or target date for sending)</li><li>Discuss if region/chapter shirts will be done</li></ul>

#### February 2023

February 22	Regional Executive Council meeting (virtual)
February 15	February 2023 Leadership Connection Call – 2-3 p.m. CT.
Pres/PE Call	<p>Follow-up/check in with President-Elects:</p> <ul style="list-style-type: none"><li>LTC attendees/registration</li><li>Leadership Roster entered by March 1<sup>st</sup></li></ul>
By February 28	<p>Develop draft agenda topics for Regional Planning time at LTC (Association provides suggested topics)</p> <ul style="list-style-type: none"><li>Regional webinar schedule (if applicable)</li></ul>

#### March 2023

March 15	March 2023 Leadership Connection Call – 2-3 p.m. CT.
March 21	Regional Executive Council meeting (virtual)
Pres/PE Call	Finalize plans at LTC – social activities, planning time
By March 31	Finalize preparations for LTC

#### April 2023

April 12	April 2023 Leadership Connection Call – 2-3 p.m. CT.
April 16	Regional Executive Council meeting (in person)
April 16-18	Leadership Training Conference San Antonio, TX
By April 30	<ul style="list-style-type: none"><li>RE team meet for LTC debrief – identify follow-up items for discussion at Volunteer Leadership meeting at Annual Conference</li><li>Notify <a href="#">Volunteer Experience Team</a> of the Regional Executive III and Regional Treasurer for 2023-2024</li></ul>

## May 2023

May 17	May 2023 Leadership Connection Call – 2-3 p.m. CT.
Pres/PE Call	Confirm with Presidents and President-Elects on attendance at Annual Conference
Anytime	Begin planning agenda/activities for Volunteer Leader Meeting (VLM) at Annual Conference (takes place of fall meeting)
By May 31	<ul style="list-style-type: none"> <li>• Set up periodic meeting series with RE2 and RE3 to meet as an RE team</li> <li>• Set up periodic meetings with Chapter leaders (Presidents and President-Elects) – recommend monthly</li> <li>• Confirm upcoming RE Council meetings are on your calendar (see annual guidelines)</li> <li>• Banner materials (2 sets) – RE team decide who will keep these and process for Chapters to request</li> <li>• RE Team review Regional Operating Agreement and redline any changes to be reviewed/approved by P/PE's at VLM in June</li> </ul>
May 31	End of HFMA fiscal year

## Regional Executive

### June 2023

June 1	Start of HFMA fiscal and membership year and DCMS chapter year
June 21	June 2022 Leadership Connection Call – 2-3 p.m. CT.
June 25	Regional Executive Council meeting (in person)
June 25	Volunteer Leader Meeting – Regional Planning Time <ul style="list-style-type: none"> <li>• Regional Operating Agreement</li> <li>• Chapter requests for RE team at events and use of banner materials</li> </ul> RE team discuss attendance at Chapter events
June 25-28	Annual Conference Nashville, TN

## July 2023

Early July	<ul style="list-style-type: none"> <li>• RE team debrief of VLM</li> <li>• Check in with 2022-2023 regional treasurer to ensure finance activities will be completed by August 1<sup>st</sup> due date</li> </ul>
Pres/PE Call	Confirm completion of annual Chapter activities: <ul style="list-style-type: none"> <li>• Complete Chapter Verification Form (including annual education program plan)</li> <li>• Chapter Success Plan - Chapters will be asked to provide verbal updates on these goals during Regional calls throughout the year</li> </ul>
July 19	July 2023 Leadership Connection Call – 2-3 p.m. CT.

## August 2023

August 1	Confirm finance information is submitted for the Region:
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	IRS Form 990
	Financial Review
	Authorization of Inclusion of Regional Information for the Group Tax Return Form
	Certification of Regional Organization
	Region Practice of Operating Policies Form
	Enter Regional Budget into Quick Books
	Record Retention Policy
	Whistleblower Protection Policy
August 16	August 2023 Leadership Connection Call – 2-3 p.m. CT.
August 23	Regional Executive Council meeting (virtual)

## September 2023

September 15	Informational Form 990 (Excel Document) Due – HFMA Accounting will prepare upon submission of Annual Review and send for review and final completion to leader
September 20	September 2023 Leadership Connection Call – 2-3 p.m. CT.
September 27	Regional Executive Council meeting (virtual)

## October 2023

October 18	October 2023 Leadership Connection Call – 2-3 p.m. CT.
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## November 2023

November 13-14	Regional Executive Council meeting (in person)
November 15	November 2023 Leadership Connection Call – 2-3 p.m. CT.

## December 2023

December 20	December 2023 Leadership Connection Call – 2-3 p.m. CT.
Pres/PE Call	Remind Chapter Leaders begin thinking about nominations for RE3

## January 2024

January 17	January 2024 Leadership Connection Call – 2-3 p.m. CT.
January 24	Regional Executive Council meeting (virtual)
Pres/PE Call	RE2 confirm President-Elects have sent Leadership Training Conference (LTC) information to their leaders (or target date for sending)

## February 2024

February 21	February 2024 Leadership Connection Call – 2-3 p.m. CT.
Pres/PE Call	RE2 Follow-up/check in with President-Elects: <ul style="list-style-type: none"> <li>• LTC attendees/registration</li> <li>• Leadership Roster entered by March 1<sup>st</sup></li> </ul>
February 28	Regional Executive Council meeting (virtual)
By February 28	RE2 develop draft agenda topics for Regional Planning time at LTC (Association provides suggested topics)

## March 2024

March 20	March 2024 Leadership Connection Call – 2-3 p.m. CT.
Pres/PE Call	RE2 finalize plans at LTC – social activities, planning time
By March 31	RE2 finalize preparations for LTC

## April 2024

April 17	April 2024 Leadership Connection Call – 2-3 p.m. CT.
April 21	Regional Executive Council meeting (in person)
April 21-23	Leadership Training Conference Orlando FL

## May 2024

Date TBD	Regional Executive Council meeting (virtual, if needed)
May 15	May 2024 Leadership Connection Call – 2-3 p.m. CT.
May 31	End of HFMA fiscal year

## Additional Resources

- **Leadership Connection calls** – Register [here](#) for these calls that occur monthly from 2-3p
- [Leadership Connection Community Group](#) – this is a community group exclusively for chapter and regional leaders. The Association will provide updates via this community so plan to drop by the community weekly or [set your email digest](#) preferences accordingly. This community will also serve as a connection point for chapter leaders.
- [Regional Executive Council Community](#) – this is a community group exclusively for Regional Executives. The Association will periodically post information in this community, but it is also a forum for discussion among the RE group.
- For a full list of **Financial requirements & responsibilities** view the table on the [Finance Operations](#) webpage in the Chapter Resource Center.
- To view the **DCMS policy** for a full list of chapter requirements, visit the [Chapter Planning and Resource Guide](#) webpage.
- To download your **regional logo** visit the [Communication](#) webpage.
- Looking for a template **HFMA 101 presentation** or other presentation? Visit the [Presentations](#) webpage.
- Use the [Event Request Form](#) to request assistance with live, virtual or digital events and sponsorship set up.
- Use the [Website Request Form](#) to request a new website build or updates to an existing website.
- For event or website-related questions, please contact [onehfma@hfma.org](mailto:onehfma@hfma.org).
- For all other chapter questions, please contact [chapter@hfma.org](mailto:chapter@hfma.org).