



## REGIONAL EXECUTIVE ACTIVITIES

### June 2024

June 1	Start of HFMA fiscal year, membership year, and DCMS chapter year
June 19	Monthly Leadership Connection Call – 2-3 pm CT
June 24	Regional Executive Council meeting (in person)
June 23-24	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> <li>• Chapter Success Plans (due to RE by July 1<sup>st</sup>)</li> </ul> RE team discuss attendance at Chapter events
June 24-27	Annual Conference Las Vegas NV

### July 2024

July 1	Code of Ethics Training Due (REs and Presidents only)
Early July	<ul style="list-style-type: none"> <li>• RE team debrief of VLM</li> <li>• Check in with 2023-2024 regional treasurer to ensure finance activities will be completed by August 1<sup>st</sup> due date               <ul style="list-style-type: none"> <li>○</li> </ul> </li> </ul>
Pres/PE Call	Check on completion of annual Chapter activities (DCMS requirements): <ul style="list-style-type: none"> <li>• Chapter Verification Form (if not submitted yet)</li> <li>• Financial info due August 1<sup>st</sup></li> </ul>
July 17	Monthly Leadership Connection Call – 2-3 pm CT

### August 2024

August 1	Confirm finance information is submitted for the Region: <ul style="list-style-type: none"> <li>• IRS Form 990</li> <li>• Financial Review</li> <li>• Authorization of Inclusion of Regional Information for the Group Tax Return Form</li> <li>• Certification of Regional Organization</li> <li>• Region Practice of Operating Policies Form</li> <li>• Regional Budget entered in Quick Books</li> </ul>
	Record Retention Policy
	Whistleblower Protection Policy
Early August	DCMS Tracker

	<ul style="list-style-type: none"> <li>○ Chapter Success Plan – Update status for each chapter</li> <li>○ Check status of Chapter Verification Form</li> </ul>
August 21	Monthly Leadership Connection Call – 2-3 pm CT
August 28	Regional Executive Council meeting (virtual)

## September 2024

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 18	Monthly Leadership Connection Call – 2-3 pm CT
September 25	Regional Executive Council meeting (virtual)

## October 2024

October 16	Monthly Leadership Connection Call – 2-3 pm CT
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## November 2024

November 11-12	Regional Executive Council meeting (in person)
November 20	Monthly Leadership Connection Call – 2-3 pm CT

## December 2024

December 4	President-Elect Leadership Training Conference Prep Call – 2-3 pm CT
December 18	Monthly Leadership Connection Call – 2-3 pm CT
Pres/PE Call	Remind Chapter Leaders begin thinking about nominations for RE3

## January 2025

January 15	Monthly Leadership Connection Call – 2-3 pm CT
January 22	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 2025

February 19	Monthly Leadership Connection Call – 2-3 pm CT
Pres/PE Call	RE2 Follow-up/check in with Presidents-Elect: <ul style="list-style-type: none"> <li>• LTC attendees/registration</li> <li>• Leadership Roster entered by March 1<sup>st</sup></li> </ul>
February 26	Regional Executive Council meeting (virtual)
By February 28	RE2 develop draft agenda topics for Regional Planning time at LTC (Association provides suggested topics)

## March 2025

March 1	Success Award Submissions Due ( <i>REC members will be assigned submissions to judge during month</i> )
March 19	Monthly Leadership Connection Call – 2-3 pm CT
Pres/PE Call	RE2 finalize plans at LTC – social activities, planning time
By March 31	RE2 finalize preparations for LTC

## April 2025

April 16	Monthly Leadership Connection Call – 2-3 pm CT
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## May 2025

May 4	Regional Executive Council meeting (in person)
May 4-6	Leadership Training Conference Nashville TN
May 21	Monthly Leadership Connection Call – 2-3 pm CT
May 31	End of HFMA fiscal year

## Additional Resources

- **Connect**
  - **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.
- **Communications**
  - To download your **regional logo** visit the [Communication](#) webpage.
  - Looking for a template **HFMA 101 presentation** or other presentation? Visit the [Presentations](#) webpage.
- **Operations**
  - 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.
- **Forms**
  - Complete the HFMA [National Officer Speaking Request](#) form to request the HFMA CEO (Ann Jordan), Board Chair, Chair-Elect, or Secretary/Treasurer to speak at your event (must be submitted at least six months prior to event)

- 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.
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- Key Contacts
    - 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).