



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">• Regional Operating Agreement• Chapter requests for RE team at events and use of banner materials• Chapter Success Plans (due to RE by July 1st) 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">• RE team debrief of VLM• Check in with 2023-2024 regional treasurer to ensure finance activities will be completed by August 1st due date<ul style="list-style-type: none">○
Pres/PE Call	Check on completion of annual Chapter activities (DCMS requirements): <ul style="list-style-type: none">• Chapter Verification Form (if not submitted yet)• Financial info due August 1st
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">• 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• Regional Budget entered in Quick Books
	Record Retention Policy
	Whistleblower Protection Policy
Early August	DCMS Tracker

	<ul style="list-style-type: none"> ○ Chapter Success Plan – Update status for each chapter ○ Check status of Chapter Verification Form
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"> • LTC attendees/registration • Leadership Roster entered by March 1st
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.

- **Key Contacts**
 - For event or website-related questions, please contact onehfma@hfma.org.
 - For all other chapter questions, please contact chapter@hfma.org.