



## REGIONAL EXECUTIVE ACTIVITIES

### June 2026

June 1	Start of HFMA fiscal year, membership year, and DCMS chapter year: <ul style="list-style-type: none"> <li>Schedule monthly calls with RE team and chapter Presidents/Presidents-elect</li> <li>Update Region website – RE team, welcome note</li> </ul>
June 7-10	Annual Conference ( <i>not a requirement to attend</i> ) National Harbor MD
June 17	Monthly Leadership Connection Call – 2-3 pm CT
June 24	Regional Executive Council meeting (virtual)

### July 2026

Early July	Check in with 2025-2026 regional treasurer to ensure finance activities will be completed by August 1 <sup>st</sup> due date
Pres/PE Call	Check on completion of items due August 1: <ul style="list-style-type: none"> <li>Chapter Verification Form (DCMS requirement)</li> <li>Financial forms/review (DCMS requirement)</li> <li>Chapter Success Plan (send to RE)</li> <li>Conflict of Interest Disclosure (Chapter Officers and Voting Directors)</li> <li>Code of Ethics Training (<i>Chapter Presidents and RE only</i>)</li> </ul> Discuss agenda for Fall Leadership Meeting
July 15	Monthly Leadership Connection Call – 2-3 pm CT
July 22	Regional Executive Council meeting (virtual)

### August 2026

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
	Code of Ethics Training Due ( <i>RE and Presidents only</i> )
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 and Finance items</li> </ul>
Pres/PE Call	Finalize agenda for Fall Leadership Meeting
August 19	Monthly Leadership Connection Call – 2-3 pm CT

## September 2026

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 (DCMS requirement)
September 16	Monthly Leadership Connection Call – 2-3 pm CT
September 16	Regional Executive Council meeting (virtual)

## October 2026

October 21	Monthly Leadership Connection Call – 2-3 pm CT
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## November 2026

November 16-17 <i>(tentative)</i>	Regional Executive Council meeting (in person/Chicago)
November 18	Monthly Leadership Connection Call – 2-3 pm CT

## December 2026

December 2	President-Elect Leadership Year Prep Call – 2-3 pm CT
December 16	Monthly Leadership Connection Call – 2-3 pm CT
Pres/PE Call	<ul style="list-style-type: none"> <li>● Begin RE3 nomination process</li> <li>● Check in on chapter leadership team development (slate of nominees)</li> </ul>
December 24 – January 1	HFMA Offices closed for Holidays

## January 2027

January 20	Monthly Leadership Connection Call – 2-3 pm CT
January 27	Regional Executive Council meeting (virtual)
Pres/PE Call	<ul style="list-style-type: none"> <li>● RE 3 nomination/election process</li> <li>● RE2 confirm Presidents-Elect have sent Leadership Summit information to their leaders (or target date for sending)</li> <li>● Confirm chapters are on track to send out ballots by February 15<sup>th</sup></li> </ul>

## February 2027

February 17	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>● Summit attendees/registration</li> <li>● Leadership Roster entered by March 1<sup>st</sup></li> <li>● Success Award submissions due March 1<sup>st</sup></li> </ul>

	<ul style="list-style-type: none"> <li>• RE 3 nomination/election process</li> </ul>
By February 28	RE2 develop draft agenda topics for Regional Planning time at the Leadership Summit (Association provides suggested topics)

## March 2027

March 1	Success Awards submissions Due
March 3-15	REC members review/score submissions
March 10	Regional Executive Council meeting (virtual)
March 17	Monthly Leadership Connection Call – 2-3 pm CT
Pres/PE Call	<ul style="list-style-type: none"> <li>• RE2 finalize plans at The Summit – social activities, planning time</li> <li>• Discuss dates/location for Fall Leadership Meeting and submit to Association</li> </ul>
By March 31	RE2 finalize preparations for The Summit

## April 2027

April 14	Monthly Leadership Connection Call – 2-3 pm CT
April 18-20	Leadership Summit Atlanta GA
April 19	Regional Executive Council meeting (in person)

## May 2027

May 19	Monthly Leadership Connection Call – 2-3 pm CT
Pres/PE Call	Discuss agenda items for Fall Leadership Meeting
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 on the Chapter Resource Center.
  - Looking for a template **HFMA 101 presentation** or other presentation? Visit the [Event and Website Resources](#) webpage on the Chapter Resource Center.
- **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 Officer & Industry Expert Speaker Request Form](#) to request an HFMA national officer (Chair, Chair-Elect, Secretary/Treasurer, or Ann Jordan, HFMA President & CEO) or industry expert to speak at an upcoming 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](mailto:onehfma@hfma.org).
  - For all other chapter questions, please contact [chapter@hfma.org](mailto:chapter@hfma.org).