

Leadership Engagement and Advancement (LEAN) Team Responsibilities and Requirements

The LEAN Team aims to empower and support volunteer leaders through strategic collaboration and knowledge sharing to support ongoing chapter success and volunteer engagement. This is accomplished by providing innovative solutions and guidance that enhances chapter leader capabilities, fosters effective communication, and drives successful execution within the chapter.

This group can support chapters in many areas, each of which is listed in the table below along with a brief description of the responsibilities and time commitment.

Area of Support	Method of Support	Time Commitment	Responsibility
Guidance on a specific issue/situation	Virtual (phone call and/or video meeting)	1-2 hours	Schedule call with chapter leaders to review issue/situation Share any resources available to assist in solving issue/situation (either on Chapter Resource Center or other source)
Chapter Leadership presentation (Board orientation, Chapter Leadership orientation, or similar)	Virtual (video meeting) or in person	Virtual: 3-5 hours In Person: 3-5 hours + travel and session	Schedule call with chapter leaders to discuss request and refine topic and content desired Develop presentation (Volunteer Experience Team will assist) Deliver presentation
Conference/program presentation (HFMA 101, Certification, or similar)	Virtual (video meeting) or in person	Virtual: 3-5 hours In Person: 3-5 hours + travel and session	Schedule call with chapter leaders to discuss request and refine topic and content desired Develop presentation (Volunteer Experience Team will assist) Deliver presentation
Mini-Summit/LTC support (volunteer engagement, topic presentation)	Virtual (video meeting) or in person	Virtual: 3-5 hours In Person: 3-5 hours + travel and session	Schedule call with chapter leaders to discuss request and refine topic and content desired Develop presentation (Volunteer Experience Team will assist) Deliver presentation
Facilitation (in depth review/discussion of specific topics)	In person	12-20 hours prep, reporting, and follow-up + travel and facilitation	Initiate communication with chapter to discuss request and refine goals of facilitations. Conduct pre-meeting chapter assessments (such as a SOAR analysis) and provide recommendations for improvement Prepare presentations (including HFMA data and metrics) and other meeting materials as required Follow up on agreed upon actions from facilitations Update HFMA staff through ongoing communication regarding facilitations, chapter issues, and/or progress. Prepare written report within two weeks of facilitation and submit to HFMA Provide ongoing communication with chapters via email and conference calls throughout the

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			facilitation process and follow-up with chapter after facilitation at regular intervals
Leadership Summit (subset of team)	In person	Two days for prep meeting in Chicago Three days for Summit	Participate in Summit planning calls Moderate sessions as needed – assist with Q&A, networking, etc Attend chapter planning time by request or to continue support from a facilitation Be <i>fully</i> engaged at all times as volunteers look to this team as representing the volunteer leader Participate in post-Summit debrief sessions
Monthly Leadership Connection Calls	Virtual	1 hour per month (third Wednesday at 2pm Central)	Attend as schedule allows and participate as appropriate
LEAN Team Meetings	Virtual	Up to six per year – 1 hour each	Attend as schedule allows Chapter support activities reviewed/discussed and best practices shared Review other items as needed

Note: Travel expenses for in person support are paid by the chapter.

KEY SKILLS AND COMPETENCIES

- Develop and deliver training
- Present to small and large groups
- Manage small and large group conversations
- Facilitation
- Leading crucial conversations
- Coach/mentor
- Problem solving/conflict management
- Diplomacy and tact
- Inspirational
- Timely follow through
- Good listener
- Consensus builder

KEY TRAITS

- Enthusiasm and the ability to convey enthusiasm
- Flexibility and adaptability
- Ability to motivate
- Creativity as it applies to problem solving and new ideas
- Ability to think on your feet
- Ability to be open and neutral

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HFMA CHAPTER AND NATIONAL EXPERIENCE WITHIN THE LAST 4 YEARS SUCH AS

- Previously served as chapter president (required)
- Previously served on an HFMA national committee, Regional Executive Council or task force
- Familiarity with chapter programs, policies and current issues/concerns of chapter leaders
- Coaching volunteers in areas of:
 - One HFMA
 - Strategic planning
 - Leadership development
 - Succession planning and transition
 - Volunteer recruitment and retention
 - Communication
 - Education
 - Membership recruitment and retention
 - Certification
 - Davis Chapter Management System (DCMS)
 - Orientation to HFMA

POSITION TERM

- One-year initial term, with option to continue up to two more years

Please note: It is recommended that LEAN Team members not hold, or seek to hold, other HFMA national positions during their tenure on the Team in order to minimize volunteer time conflicts.