



REGIONAL EXECUTIVE ACTIVITIES

June 2025

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| June 1 | Start of HFMA fiscal year, membership year, and DCMS chapter year |
| June 19 | Monthly Leadership Connection Call – 2-3 pm CT |
| June 22-25 | Annual Conference (<i>not a requirement to attend</i>) Denver CO |

July 2025

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| Early July | Check in with 2024-2025 regional treasurer to ensure finance activities will be completed by August 1 st due date |
| Pres/PE Call | Check on completion of annual Chapter activities (DCMS requirements): <ul style="list-style-type: none"> • Chapter Verification Form • Financial info due August 1st |
| July 15 | Regional Executive Council meeting (virtual) |
| July 16 | Monthly Leadership Connection Call – 2-3 pm CT |

August 2025

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| 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 |
| | Code of Ethics Training Due (REs and Presidents only) |
| Early August | DCMS Tracker <ul style="list-style-type: none"> ○ Chapter Success Plan – Update status for each chapter ○ Check status of Chapter Verification Form and Finance items |
| August 20 | Monthly Leadership Connection Call – 2-3 pm CT |
| August 27 | Regional Executive Council meeting (virtual) |

September 2025

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| 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 17 | Monthly Leadership Connection Call – 2-3 pm CT |
| September 24 | Regional Executive Council meeting (virtual) |

October 2025

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| October 15 | Monthly Leadership Connection Call – 2-3 pm CT |
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November 2025

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| November 10-11 (tentative) | Regional Executive Council meeting (in person) |
| November 19 | Monthly Leadership Connection Call – 2-3 pm CT |

December 2025

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| December 3 | President-Elect Leadership Prep Call – 2-3 pm CT |
| December 17 | Monthly Leadership Connection Call – 2-3 pm CT |
| Pres/PE Call | Begin RE3 nomination process |
| December 24 – January 1 | HFMA Offices closed for Holidays |

January 2026

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| January 21 | Monthly Leadership Connection Call – 2-3 pm CT |
| January 28 | Regional Executive Council meeting (virtual) |
| Pres/PE Call | <ul style="list-style-type: none"> RE 3 nomination/election process RE2 confirm President-Elects have sent Leadership Summit information to their leaders (or target date for sending) Confirm chapters are on track to send out ballots by February 15th |

February 2026

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| February 18 | 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"> Summit attendees/registration Leadership Roster entered by March 1st RE 3 nomination/election process |
| By February 28 | RE2 develop draft agenda topics for Regional Planning time at the Leadership Summit (Association provides suggested topics) |

March 2026

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| March 1 | Success Award Submissions Due (<i>REC members will be assigned submissions to judge during month</i>) |
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| March 18 | Monthly Leadership Connection Call – 2-3 pm CT |
| March 26 | Regional Executive Council meeting (virtual) |
| Pres/PE Call | RE2 finalize plans at The Summit – social activities, planning time |
| By March 31 | RE2 finalize preparations for The Summit |

April 2026

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| April 15 | Monthly Leadership Connection Call – 2-3 pm CT |
| April 26 | Regional Executive Council meeting (in person) |
| April 26-28 | Leadership Summit Austin TX |

May 2026

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| May 20 | 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 [Event and Website Resources](#) 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.