



REGIONAL EXECUTIVE ACTIVITIES

June 2025

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

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

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

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

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

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

December 2025

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

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 processRE2 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

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/registrationLeadership Roster entered by March 1stRE 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

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

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

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.