

# *Sample Job Descriptions*

## JOB DESCRIPTION **BOARD OF DIRECTORS**

**General Description:**

The Board of Directors functions as the chief governing body of the chapter. Board members shall have authority and responsibility for supervising the general operation of the chapter in the furtherance of its stated purpose, mission, and goals. Each Board Member is directly accountable to the President of the Board for performance of the stated duties.

**Term:**

Minimum of one Year

**Time Commitment:**

To meet Chapter goals 4times per year

**Goals, Objectives, and Responsibilities:**

- Attends all regular and special meetings of the Board of Directors and the membership, and notifies the President if unable to attend.
  
- Participates in the formulation of the chapter's strategic and/or short- and long-range plans including annual goals and objectives.
  
- Contributes to the development, approval, and monitoring of the chapter's annual budget.
  
- Evaluates chapter policies and programs on a regular basis and makes appropriate recommendations.
  
- Brings member issues and concerns to the attention of the Board of Directors for consideration and action.
  
- May chair a committee or special task force and/or serve as a member of, or liaison to, at least one committee, as assigned by the President and/or Board of Directors.
  
- Performs any other non-specified duties necessary to further the business of the chapter as duly authorized by President and/or Board of Directors.

## JOB DESCRIPTION CERTIFICATION CONTACT

**General Description:**

The chapter Certification Chairman is the chapter's primary point of contact for certification information. He/she is responsible for ensuring that the chapter makes information about certification available in a convenient form, to assist in establishing test days for the chapter, and to work with the chapter president to identify willing certified members to appoint as proctors. Ideally, the Certification Chairman would be a certified member who is qualified to serve as a proctor, or someone who is interested in becoming certified.

**Term:**

Minimum of one year

**Time Commitment:**

+/- 5 hours per month average

**Goals, Objectives, and Responsibilities:**

- Develops and maintains processes to encourage members to become certified, to encourage them to maintain their certifications once they are earned, and to act as proctors for chapter testing events.
  
- Work with chapter members and HFMA National to ensure that members submit complete testing information so they can be properly registered to test.
  
- Work with local resources to locate appropriate facilities for offering Internet-based examinations. Such resources can include using local college computer labs or educational facilities at local hospitals.
  
- Work with chapter Program Committee and Board to establish test dates within the chapter to allow members to take the certification exams during the year. These test dates can be chosen to coincide with other chapter activities, such as a program, to allow synergies to develop between testing and other activities.
  
- Work within the chapter to offer appropriate resources in support of certification for the chapter. Such resources can include study groups and group overviews of certification requirements and ways to prepare for certification.
  
- Add other duties or responsibilities specific to your chapter.

## JOB DESCRIPTION **CHAPTER PRESIDENT**

**General Description:**

The President is the chapter's chief operating officer and generally responsible for managing all chapter activities and for the overall operation of the chapter. He/She shall work to ensure member needs are addressed and that a high-quality level of activity is maintained.

**Term:**

One Year

**Time Commitment:**

To meet Chapter goals

**Goals, Objectives, and Responsibilities:**

- Develop goals and objectives of the chapter and each committee in conjunction with the Board of Directors and committee members. Document these goals and objectives in the chapter's Bylaws. Distribute copies of this manual to the Board members and officers.
- Develop overall chapter organizational structure and publish in Bylaws.
- Work with chapter committees on an as-needed basis to facilitate achievement of goals and objectives.
- Preside at all board meeting and chapter committee meetings and report pertinent information to the membership.
- Act as the chapter liaison with the region, Regional Executive, and other related healthcare organizations.
- Hold at least four Board meetings during the year.
- Review and revise the chapter bylaws as necessary.
- Coordinate all chapter activities with HFMA National activities and objectives.
- Attend other HFMA National meetings as required.
- Add other duties or responsibilities specific to your chapter.

## JOB DESCRIPTION

# CHAPTER PRESIDENT-ELECT

**General Description:**

The President-elect shall provide support and assistance to the operation of the chapter. The President-elect acts in the capacity of the President when he/she is unable to be present. The President-elect is delegated responsibility by the President at his/her discretion.

**Term:**

One Year

**Time Commitment:**

To meet Chapter goals

**Goals, Objectives, and Responsibilities:**

- Assist in selection of committee members for all chapter committees.
- Coordinate the chapter's planning and goal-setting process.
- Conduct planning meeting for the upcoming year.
- HFMA National meetings as required.
- Attend all meetings that the President is unable to attend with his/her proxy, as necessary.
- Add other duties or responsibilities specific to your chapter.

**JOB DESCRIPTION**  
**PROGRAM CHAIR/COMMITTEE**

**General Description:**

The Education/Program Committee is responsible for developing and coordinating all chapter educational sessions, including program content, speakers, attendee registration, site arrangements and payment, and meeting follow-up. The Education/Program Committee will include a Chairperson and at least 6 other committee members.

**Term:**

Minimum of one Year

**Time Commitment:**

To meet Chapter goals

**Goals, Objectives, and Responsibilities:**

- Provide tentative educational program schedule to the Board with proposed dates and topics by June 1st.
- Establish committee goals, which may include: net program income, member and total attendance, and member educational hours. Establish a monitoring system and report results to Board.
- Develop and coordinate the chapter's educational sessions during the year on a variety of topics to meet the members' needs and meet the chapter's Chapter Balanced Score Card (CBSC) goal.
- Ensure that appropriate information is reported to HFMA National on a timely basis.
- Add mini - LTC
- Add other duties or responsibilities specific to your chapter.
- Attend Board meetings

## JOB DESCRIPTION

# CHAPTER SECRETARY

**General Description:**

The Secretary is responsible for maintaining all chapter records of meetings and communicating that data to the appropriate members and other interested individuals. The Secretary is also responsible for attending and maintaining all Board Meeting minutes.

**Term:**

Minimum of one year

**Time Commitment:**

To meet Chapter goals

**Goals, Objectives, and Responsibilities:**

- Attend Board meetings and develop/maintain Board minutes.
- Attend chapter strategic planning session.
- Add other duties or responsibilities specific to your chapter.

## **JOB DESCRIPTION**

# **MEMBERSHIP CHAIR/COMMITTEE**

**General Description:**

The Membership Committee is responsible for building and maintaining the chapter's membership. The committee will coordinate the chapter's membership campaign to fulfill the chapter's goal of new and retained members for the upcoming year. The Membership Committee will include a Chairperson and at least two other committee members.

**Term:**

Minimum of one year

**Time Commitment:**

Sufficient commitment to meet Chapter goals

**Goals, Objectives, and Responsibilities:**

- Develop and maintain process to identify new members through the educational sessions and chapter newsletter. Contact each potential candidate at least once during the year for possible membership.
- Develop and maintain process to reinstate lapsed members. Contact each lapsed member at least once during the year for possible renewal.
- Work with appropriate Board member to identify at least two healthcare-related organizations to promote membership and the chapter. The healthcare-related organizations are to include, but are not limited to:
  - Student organizations
  - Healthplans
  - Medical Groups/IPTs
- Develop a comprehensive annual membership strategy due to be completed by the end of August of each calendar year
- Attend Board meetings
- Strategy should be developed inline with the HFMA National Membership Annual Calendar.



**VOLUNTEER DESCRIPTION**  
**NEWSLETTER DIRECTOR/COMMITTEE**  
**HFMA San Diego-Imperial County Chapter**

**General Description:**

The Newsletter Director, a voting Board member of the San Diego-Imperial Chapter of HFMA, is responsible for the coordination and electronic publication of chapter newsletters (minimum of 4). The Director will ensure each newsletter meets all applicable Davis Chapter Management System [DCMS] requirements. The Director may establish a volunteer committee to assist in newsletter production.

**Term:**

One year. Not term limited.

**Time Commitment:**

- Attend the year-end annual Chapter meeting and Board installation event.
- Register and attend the Spring Leadership Training Conference (LTC) with other incoming chapter leaders.
  - Participate in the Newsletter training sessions.
  - Participate in chapter strategic planning session the last day of LTC.
- Quarterly Newsletter publication.
- Attend and participate in quarterly chapter Board meetings. Of the four (4) regular meetings of the Board of Directors annually, one shall be designated the annual Chapter meeting which is the year-end meeting and Board installation event.
- Attend Chapter; Regional, and ANI events as able.

**Goals, Objectives, and Responsibilities:**

- Receive FY [6/1-5/31] Organizational chart and Chapter leader contact information.
- Receive from outgoing Newsletter Chair:
  - Editorial calendar of DMCS due dates [Aug., Nov., Feb., and May]; News and/or events to cover quarterly with assigned chapter leaders to gain articles and/or insight from.
  - Chapter newsletter templates for each previous quarter
  - Current Chapter sponsorship list with levels, benefits, and renewal month – verify ongoing with Sponsorship Chair.
- Seek and obtain articles, pictures, and chapter news and information necessary to prepare and distribute chapter newsletter. Reach out to chapter sponsors that qualify for article submissions. Send newsletter draft for review to President and President-Elect a couple of weeks prior to the DCMS submission deadline. Once approved, send the newsletter to the chapter Secretary for membership distribution. Send a copy also to National using the following online Newsletter Reporting Tool: [http://www.hfma.org/site/chapter\\_resources/membercommunication\\_report.cfm](http://www.hfma.org/site/chapter_resources/membercommunication_report.cfm)
- Ensure that appropriate information is reported to HFMA National on a timely basis.

## JOB DESCRIPTION

# CHAPTER TREASURER

### **General Description:**

The Treasurer is responsible for overseeing the financial management of the chapter. Activities include the development of an annual budget, maintaining control and accountability over revenues and expenditures, and financial reporting to the Board. The Treasurer is responsible for the safekeeping, recording, and disbursement of all chapter funds in accordance with established fiscal policy, Board direction, and the annual operating budget. The Treasurer is also responsible for attending all Board meetings and for reporting all requested financial information to the HFMA National office.

### **Term:**

One year

### **Time Commitment:**

Five to ten hours/month on average

### **Goals, Objectives, and Responsibilities:**

- Keep chapter Board of Directors informed of current financial position.
- Refer to the *Financial, Tax and Insurance management Guide* and the *Chapter Planning and Resource Guide* for details on charter requirements and suggested management practices.
- DCMS Reporting for Chapter Treasurers:
  - Chapters are required to develop an annual operating budget and submit it to HFMA National by June 1.
  - Chapters are required to conduct a financial review to test and validate their fiscal integrity and operating guidelines and submit it to HFMA National by August 1.
  - Chapters are required to submit the financial information for IRS Form 990 to HFMA National by August 1.
  - The HFMA National Board requires that each HFMA chapter certify their organizational structure - Certification of Chapter Organization. Validate and send to HFMA National by August 1
- Maintain records in accordance with generally accepted accounting principles on an accrual basis as directed by HFMA National.
- Review and/or establish clear Financial policies and procedures and chart of accounts.
- Retain chapter financial records as required by HFMA National/record retention policy
- Establish a chapter checking account and obtain appropriate signature cards and resolutions in an appropriate institution per chapter policy.
- Maintain chapter certificates of deposit or other investment vehicles and reinvest as directed by the Board of Directors.

**HFMA LTC Presidents Elect**  
**Maximizing the Volunteer Experience**

- Issue all checks for approved budgeted expenditures and/or any exceptions approved by the Board and mail to the president for approval and signature on a timely basis.
- Ensure that all expenditures are approved and verified prior to payment.
- Ensure that all receipts and disbursements are recorded consistent with the appropriate accounting conventions currently in practice.
- Ensure that all deposits are made on a timely basis with appropriate back-up and receipt.
- Provide appropriate assistance to the annual audit process.
- Ensure that appropriate information is submitted to HFMA National for reporting on a timely basis.
- Prepare and deliver a Financial Report at each Board of Directors meeting.
- Advise the Board as to appropriate investment options as excess funds become available.
- Deliver all accounting records in appropriate, balanced order to the incoming treasurer.
- Provide advice for chapter planning based on budget and current financials
- Monitor cash flows and advise the Board accordingly
- Help set fair and appropriate fees for classes and social events
- Provide financial update/article for newsletter