

Chapter Advancement Team (CAT) Duties and Responsibilities

KEY DUTIES AND RESPONSIBILITIES

CHAPTER FACILITATIONS

- Assist chapters as requested in facilitations, such as mini-LTCs, strategic planning sessions, or other facilitation meetings
- Approximately one to two day(s) in length with 12-20 additional hours required per facilitation for planning, reporting, and follow-up
- Initiate communication with chapters concerning CAT facilitations or other projects as assigned.
- Prepare presentations (including HFMA data and metrics) and other meeting materials as required
- Conduct pre-meeting chapter assessments and provide recommendations for improvement
- Follow up on agreed upon actions/conference calls and future facilitations
- Update HFMA staff through ongoing communication regarding facilitations, chapter issues, and/or progress
- Prepare written reports within two weeks and submit to HFMA as required for facilitations, mini-facilitations, and other projects as assigned
- Develop relationships with chapter leaders before, during and after facilitations
- Provide ongoing communication with chapters via email and conference calls throughout the CAT facilitation process and follow-up with chapter after facilitation at regular intervals

LEADERSHIP TRAINING CONFERENCE (LTC)

- Review LTC general agenda
- Recommend and prepare content for LTC sessions
- Review sessions as requested and provide feedback in a timely manner
- Actively shadow and learn during first year in preparation to be lead facilitator the next year
- Be available to present and/or facilitate sessions at LTC
- Be flexible with content and material as necessary
- Participate in pre-LTC planning calls
- Be prepared to attend chapter planning time by request or to continue support from a facilitation
- Be *fully* engaged at all times: volunteers look to you as representing the Chapter Advancement Team even when not leading a session
- Participate in post-LTC debrief sessions

OTHER

- Provide resources and necessary support as requested by HFMA or the local chapters
- Actively participate in CAT training sessions and conference calls
- Attend Chapter Leadership Connection webinars and participate as appropriate

Chapter Advancement Team (CAT) Duties and Responsibilities

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

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

Chapter Advancement Team (CAT) Duties and Responsibilities

TIME COMMITMENT

- One-year initial term, with option to continue up to two more years
- One meeting per year in Chicago – two days in length
- Up to three chapter facilitation meetings per year – each generally one to two day(s) in length with 12-20 additional hours required per facilitation for planning, reporting, and follow-up
- One Leadership Training Conference (LTC) in spring of each year – three days in length with 15-20 additional hours required for preparation
- Six conference calls per year – each 60 minutes in length
- Encouraged to attend monthly Chapter Leadership Connection webinars and participate as requested– each 60 minutes in length

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