

# Role description - accounting and analytics regional director

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The accounting and analytics regional director is responsible for regional financial reporting, quarterly financial assessment and projections of revenue and expenses. Reports to the regional treasurer.

## Regional Director responsibilities

- Maintains a committee (or committees) of volunteers to assist with strategy-setting, planning and activity implementation to deliver on committee expectations.
- Collaborates with regional Engagement committees to identify and satisfy specific volunteer needs; actively invites members from across the region (and beyond) to participate on their committee.
- Ensures all committee members are trained and have access to required materials for their role. Ensures committee members deliver on committee expectations with high quality and professionalism and ensures committee volunteers comply with all HBA standards and policies.
- Aligns committee planning, goals and activities with other relevant regional committees, chapters and HBA central.
- Establishes committee meeting frequency, defines participation expectations and chairs committee meetings.
- Attends to succession planning, developing the next wave of committee or regional leaders.
- Participates in COE, Chapter and/or regional meetings as needed to ensure alignment of activities.
- Actively participates on functional calls with HBA staff and ensure information is shared with committee in a timely manner.
- Manages committee budget, where appropriate
- Responsible for reporting committee plans and status and data to COE president.

## Accounting and Analytics responsibilities

- Reporting – Obtain monthly financial reports and provide written summary variance vs budget to regional treasurer.
- Provide quarterly financial assessment of revenue and expenses with actual vs budget.
- Prepare quarterly financial revenue and expense projections for regional to review and present to the regional board.
- Meet deadlines for reporting requests (chapter and corporate)

## Time requirements

Regional leaders spend time a) managing their designated committees, b) participating on their designated leadership team (e.g. Center of Excellence) and c) interacting with other leaders in the same role across the association.

Roles generally require about 10 hours per month. Estimated activities are as follows:

- 4-6 hrs per month managing their committees: setting and reviewing plans and progress, coaching leaders, ensuring volunteers are trained and ready for their role
- 2 hrs per month in Board or COE leader meetings: sharing and coordinating plans and progress; longer term planning and budgeting

1-2 hrs per month interacting with their role peer group: sharing innovations, discussing new policies and best practices

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