

Finance Task Force

2026/2027

CHAIR

Tommy Curcio, CCHP, Secretary/Treasurer

CHARGE

The Finance Task Force assists the Board's Secretary/Treasurer with the annual financial review of the association as well as the review of relevant finance-related processes. The Finance Task Force is convened as needed to develop new policies that deal with CHPA finances and may advise on appropriate financial metrics/goals for Board approval. At a minimum, the Finance Task Force will review the investment policy and existing financial related policies that require regular review.

COMPOSITION

The secretary/treasurer is the chair of this Task Force. Members of this task force are recruited from the membership at large, with interest in leadership and/or expertise in financial areas. All task force members shall belong to a member company in good standing. The composition of the rest of this task force represents a diverse range of CHPA member companies (membership type, revenue ranges, geographic locations) and the industry overall.

TERM

March 2026-February 2027

TIME

1-1.5 hours per quarter

RESPONSIBILITIES AND ONGOING TASKS

- Support the secretary/treasurer as requested.
- Review current financial policies and procedures for recommended updates.
- Review financial metrics for relevance; recommend any changes to the CHPA Board.
- Assist in the development of the annual association budget.
- Participate in meetings throughout the year, typically held virtually.
- Guide investment recommendations.

STAFF LIAISON

Nick Estrada, CAE, CMP, CEO

STAFF RESPONSIBILITIES

- Maintain task force roster.
- Schedule task force meetings, work with chair(s) to develop agendas and complete meeting summaries.
- Provide financial reports, policies and procedures as needed for review and discussion.
- Provide support to the task force throughout the year including data, historical context and any other additional information needed to allow the task force to make informed recommendations.
- Provide broad-level perspectives of CHPA programs, services and initiatives which may impact the discussions of the task force.

YOUR RETURN ON INVESTMENT

By serving on this task force, you will

- Expand your professional network
- Make your voice heard to CHPA leadership regarding use of financial resources
- Strengthen your financial knowledge and understanding of terminology to take back to your company

JOIN THIS TASK FORCE IF

- You love numbers and data
- Budget and long-term investment strategies are important to you