

Chapter Program Planning Guidelines

According to the Chapter Affiliate Agreement, affiliate chapters are “to provide the means by which persons and firms offering services or products within or to the case management field may voluntarily coordinate their efforts to advance the practice in all respects and, to this end, the Affiliate, among other activities, shall endeavor to:

1. Provide the opportunity for the exchange of experience and opinions through discussion, study and publications;
2. Promote the professionalism, science and recognized scope of the practice of case management;
3. Provide a forum for, and assist in unifying, professionals actively engaged in case management;
4. Educate its members, the health care delivery system, the payor community and the public in the advancement and improvement of quality care, professionalism, costs/benefit effectiveness, and health benefits of case management;
5. Develop and encourage high professional standards of performance and competence, service and conduct of professionals serving as case managers and those in case management;
6. Conduct and cooperate in the conduct of research and courses of studies for the benefit of advancing the practice of case management;
7. Promote the improved public stature and respect accorded the case management practice while meeting the best interests of practitioners and the public.”

Chapters meet the above responsibilities through local educational meetings and other related activities. Chapters should plan programs that interest a majority of chapter members, or should at least vary the topics to appeal to different audiences throughout the year.

Following are some helpful hints in planning programs:

1. Determining the Program

- Analyze current themes that will appeal to the chapter membership
- Identify speakers whose names will be familiar to the audience
- Select dates that do not conflict with school and professional meeting calendars
- Select a location that is easily accessible and has adequate parking facilities; vary the location to accommodate the various segments of the chapter membership.

2. Program Planning

- Develop format/length of the program.
- Develop a budget for the event including expenses such as food, room, publicity costs, speaker-related expenses and audio/visual rental.
- Secure speakers and workshop leaders providing confirmation to agreed upon arrangements in writing.
- Identify assistance needed from chapter committees and timeframe required for various tasks, for example (sample only):
 - Program Committee contacts speakers, sets format for the seminar, develops program objectives and evaluation materials.
 - Publicity Committee develops mailing lists, prepares and mails flyers/brochures with a registration form, posts information about the seminar in appropriate locations including Web sites.
 - Facility Committee confirms room, audio/visual and meal/break arrangements, finalizes parking/transportation needs, prepares continuing education credit-related materials, receives registration forms from attendees.

3. Program Evaluation

- Review and summarize participant evaluations
- Make recommendations for future programs
- Review budget against actual income and expenditures

4. Alternative to Hosting Individual Chapter Programs

Co-Sponsored Programs:

- Arrange with another chapter or organization to present a program reflective of the philosophy of CMSA.
- Designate a Program Planning Committee consisting of member from each chapter or organization.
- Select a site that is as centrally located as possible in relation to the co-sponsoring groups.
- Discuss financial arrangements/obligations of each group specifically and clearly early in the planning stage.
- Try to get as many volunteers as possible to divide the work and get more members involved.

5. Offering Continuing Educational Credit

- a) Decide which credentials or licensures you wish to seek approval for your program, i.e., RN, CCM, CDMS, CRC, etc...
- b) Contact the certifying or licensuring organization to inquire about the approval process. For RN, contact the State Board of Nursing, for others, contact their certifying bodies, ex: CCM is the Commission for Case Management Certification. (Contact CMSA for a list of the certifications and their certifying organizations).
- c) Obtain and complete the necessary application information.
- d) Most approval guidelines request the following information:
 - Substantiation of the learners' need for the program
 - Purpose for which the program is being offered
 - Behavioral objectives written in measurable learner behaviors
 - A content outline
 - Teaching methods, with an emphasis on active participation of the learners
 - A description of the educational and experiential preparation of each faculty
 - Speakers
 - Members of the planning committee
 - Description of the evaluation process for the program plus a sample copy of the evaluation form
 - Description of the record keeping system for approved contact hours
 - Description of the facility in which the program is being held
 - A sample copy of the promotional brochure

6. Meet the Established Deadlines for Approval