

THE CHAPTER DISPATCH

August 2005

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AT A GLANCE – Important Dates

Mark your calendars!

2005

August

Aug 26 **CM Week Product Order** deadline

Aug 31 **Call for Papers Due** for 2006 Annual Conference

October

Oct 9–15 **National Case Management Week**

Oct 31 **National Board Nomination Deadline**

NATIONAL UPDATES

Case Management Week 2005

Case Management Week is just around the corner, October 9 – 15, 2005!
Case Management – The Power to Solve the Healthcare Puzzle. Start planning your event today!

Don't forget to contact your local city and/or state government to request a 2005 Proclamation. **Tips on planning events and requesting a proclamation** can be found at www.cmsa.org/cmweek.

Your Chapter's CM Week Checklist:

August:

- Contact** local government for City and/or State Proclamation today.
- Plan** a local event to honor & recognize case managers.
- Educate** the community about the case management industry and your association.
- Order** CM Week Products **by August 26** (shipments will go out Sept 16).
- Download** the CM Week logo to customize posters and flyers to promote your event.
- Promote** your event by sending information to National about your event to post on the CMSA Calendar.

October:

- Send** National a picture of your chapter receiving their Proclamation from your politicians. (Don't forget to educate them on what case management is!)
- Send** highlights of your events and activities to the National Office to share the success of your celebrations with others in newsletters and online.

CM Week products available. Choose from long & short sleeve t-shirts, travel & coffee mugs, ink pens, & recognition pins. **Place your order by August 26.** **Order will ship by September 16.** **Order Form can be downloaded at:** www.cmsa.org/CMWeek/SampleDocs/CMWeekOrderForm.pdf.

Posters – Download the CM Week logo to create customized flyers, posters, ads, etc... Add your chapter or employer's event information to create a more detailed piece inviting others to attend your celebratory occasion! Simply right-click on the logo to save or copy graphic to your own creation.

Call for Presentations

CMSA is seeking submissions for a presentation or poster proposal for its 16th Annual Conference, June 13-17, 2006 Dallas/Ft. Worth, TX. This four-day conference will feature educational sessions focusing on current issues, trends, practices, and professional challenges facing case managers, clinicians, managers, educators, and researchers. Nationally known speakers will be featured as well as speakers from this call for presentations.

The mission of CMSA is to advance integrated care management by promoting excellence in education, research, and practice. The organization's Annual Conference provides a self-directed facilitated learning environment through classroom sessions, poster displays, exhibits, and colleague networking opportunities. Presentation proposals which deal constructively with the changing healthcare environment and/or represent cutting-edge innovations will be given top priority, as will proposals at the advanced level.

For more information on this process, please visit: <http://www.cmsa.org/Conference/CFP/>. **Online submissions process available.** **Or contact Mary Beth Pruss at** mbpruss@acminet.com. **BONUS!** As a way of saying 'thanks', all submitted CFPs will be entered into a drawing for a complimentary conference registration (applicable to all speakers noted on the CFP).



Chapter Extensions

While there is great interest in the educational and professional networking opportunities of new chapters around the US, many professionals find the idea of developing an independent Chapter prohibitive, due to the administrative and organizational demands of maintaining a full chapter status, as well as the time and political effort that would be required. CMSA National gets requests for Chapter Development information about 3-4 times a month. However, once an individual sees the amount of work and level of interest needed to begin a chapter, they chose not pursue. Many chapters have found success with forming Chapter activities in locations outside their primary territory in order to outreach to other case managers who are not able to drive the hour or more distance to come to regular meetings. This relationship is called a Chapter Extension. CMSA's Chapter Extension Program, originated from the Case Management Society of New England.

An Extension uses the Chapter's:

- Bylaws
- affiliate agreement
- local policies & procedures manual
- incorporation status
- chapter dues
- officers/board members
- administrative support

The Extension will:

- cover territory outside Chapter's 60 mile/60 minute radius
- have local Extension Vice President's that are elected to Chapter Board
- have local committees to cover educational, membership & public relation needs

Benefits to Extension include:

- Start up funding/reduced costs
- Umbrella under Chapter Articles of Incorporation and Bylaws
- Established policies and procedures
- Access to Chapter resources and vendor/sponsor relationships
- Membership to a larger and established network
- Shared administrative duties through the Chapter
- Use of Chapter logo, letterhead, website, newsletter, etc
- Affiliation of Chapter annual conference
- Stronger voice to CMSA
- greater support network
- training & mentoring support from Chapter

Benefits to Chapter include:

- increased membership growth
- extended territory for networking
- extended leadership support

A Chapter may support up to six (6) Extensions. Each Extension must be outside a 60 mile/60 minute radius of each other and the Chapter. Members of the Extension will pay dues to the National CMSA as well as to the Chapter. Through local Chapter policies and procedures, funds will be redistributed back to the Extension in support of programs, as agreed. For more information on starting an Extension of your currently established chapter, please contact Michele Lee at mlee@acminet.com.

NOTE: Chapters may rotate meeting sites and hold regular chapter meetings in other areas within their own 60 mile/60 minute radius *but this does not constitute the definition of an Extension.*



Greetings everyone,

I trust we are all making the most of the summer weather, although sunshiny days can make it a challenge to focus on chapter business and keep moving with forward momentum. We have had some very interesting and active discussions within the Chapter President's Council email list. That alone is so gratifying because it is so clear to see how we all want to see each other succeed and sharing of information – both good and not so good – is such a powerful way to accomplish that.

To this end, I thought it might be useful to compile the feedback received on specific topics into a one page resource to benefit each chapter. On the next page of this newsletter, you will find what we will affectionately refer to as the CMSA Chapter President's Council Quik Tip. As our online discussions delve into areas of chapter operations topics, I hope to continue putting these Quik Tips together for you. That said, it will be essential that each of us take the time to respond to questions from our fellow chapter leaders and share our wealth of pooled knowledge and experience. That is a long way around saying – SPEAK UP!

This Quik Tip focuses on *Member and Volunteer Recruitment*. All responses were divided under main headings. Some may have been edited for length so we could get as much on one page as possible. The headings are capitalized in an attention getting manner to make the sheet easier to reference. Most importantly, the individuals who contributed ideas are mentioned by name and chapter to facilitate direct communication for additional details if you have specific interests or if someone's feedback really hits a chord within you.

Be on the lookout for more issues of the Quik Tips. I welcome ideas for topics so please let me know what you would like to see in the future. And a major thank you to Michele for working with me on the format for this document.

Warm regards,

Teri Treiger
Your 2005-06 CPC Rep

CMSA Chapter President's Council
JULY Quik Tip

Topic: MEMBER / VOLUNTEER RECRUITMENT

What does your chapter do to:

- ☀ Be more welcoming to newcomers?
- ☀ Engage people to become more active volunteers?
- ☀ Encourage people to join?

HOLD DEDICATED MEETINGS

- ☐ Hold a separate meeting for new members to meet, greet, and identify their interests. *(N.Clark/Woodbridge, NJ)*
- ☐ Hold an "open forum" at the first official BOD meeting. Review achievements, financial status of the chapter, unfinished/open business and then open the floor for questions. *(C. Nesbitt/Birmingham, AL)*
- ☐ Hold a strategic planning meeting for the BOD. *(G. Gallagher/Oklahoma City, OK)*

BROADEN BOARD REPRESENTATION

- ☐ Broaden BOD with representation from health plan, W/C and hospital settings to ensure each area of practice has a voice in chapter operation and planning. *(C. Nesbitt/Birmingham, AL)*

DOCUMENTATION

- ☐ Develop descriptions for all board positions and committees. Include benefits of volunteering. Re-frame recruitment flyer content focusing on what volunteering can do for the member. *(T. Treiger/New England)*

MEETING DO'S AND DON'TS

- ☐ Avoid having board members bunch up together. Try not to all sit together. Circulate around the room. Have board members at the door or registration table to greet people as they arrive. *(T. Treiger/New England)*

ENHANCING MEETING ATTENDANCE

- ☐ Send announcements to physician offices. Hold meetings the right type of room (i.e. auditorium). Locate meetings close to medical facilities. Be sure parking is free and readily available. *(M. McMeans/Huntsville, AL)*
- ☐ Location is a biggy. Free/sponsored dinners. Offer great educational topics. Vary meeting times. *(M. Clopton-Davis/Denver, CO)*
- ☐ Vary meeting times and days of the week. Move meeting location based on member feedback. *(L. Hunt/Phoenix, AZ)*
- ☐ Look at the practice location of your members. Pursue meeting locations at/near those sites. Rotate meeting location. *(L. Farrar/Charlotte, NC)*
- ☐ Hold meetings every other month. Alternate between lunch and dinner mtgs. Provide free food. Free registration for members and low cost registration for non-members. Be clear and specific with regard to meeting times, especially if changing from one time to another. *(D. Miller/Jacksonville, FL)*

RECRUITING VOLUNTEERS

- ☐ Personally ask people to get more involved. Don't just send a group e-mail. Target specific people for certain roles, approach them in person, and let them know that you think they would be good at something and why. *(M. Piehowski/Minneapolis, MN)*
- ☐ Contain individual responsibilities to bite-size pieces so it is not overwhelming. *(D. Burke/New England)*
- ☐ Thank people for whatever they do on behalf of your chapter. Saying thanks goes a long way in encouraging people answer 'yes' the next time you ask for help. *(T. Treiger/New England)*

SHOW THAT MEMBER OPINIONS COUNT

- ☐ Solicit member feedback to find out what works for them. *(L. Hunt/Phoenix, AZ)*
- ☐ Conduct member surveys and focus groups. Publicize results for entire membership and connect to strategic plans for the chapter so members see that their opinions matter. *(T. Treiger/New England)*

CHAPTER HIGHLIGHTS

To contact any of the local affiliate or pending chapters, visit www.cmsa.org under the Contact tab.

New Chapter

Augusta, GA

NEW! Welcome Augusta CMSA to the CMSA family! Incorporated in August 2005, this group began meeting in early 2004. The group is very excited and already has over 20 CMSA members. They were even represented at the Chapter Leadership Workshop this summer in Orlando and is grateful to have received some good ideas from the experienced groups. Take a moment to welcome them by contacting current president, Mary Tibbetts at mtibbetts@knology.net.

Pending Chapters

Lexington, KY

A group of case managers in Lexington has been hard at work to build interest for a chapter in their area. They have held a couple of planning meetings and will host their initial kick-off meeting on September 12. They are very excited and eager to spread their word about their formation of a chapter.

Shreveport, LA

ArkLatech Chapter of CMSA has been meeting for several months and is putting the finishing touches on their steps to affiliation. They would appreciate any support or encouragement that CMSA affiliate chapters can provide them. You may contact May McAnally at May.McAnally@mrmc.net.

Cincinnati, OH

CMSA members in the Greater Cincinnati area began promoting a CMSA chapter earlier this year. Several of their leaders were present at the CMSA National Conference and able to partake in the chapter activities. They have held several planning & board meetings and will be hosting their initial kick-off meeting is planned for September 21 at the Mason Marriott from 6:00-7:30pm. The group already has 20 individuals in board and committee roles and has over 60 case managers interested. And, all this before their kick-off meeting! A local case management organization in the area has decided to disband and support the new CMSA chapter.

Official CMSA Chapters

Phoenix, AZ

The Central AZ Chapter is busy with plans to expand their membership. Currently, they are planning a meeting in August with case managers in southern Arizona/Tucson area to discuss opening an Extension Chapter to those that are interested. This would be advantageous to Central Arizona membership, but it would also bring educational and networking opportunities to the fellow CMs in southern Arizona.

Additionally, the chapter is currently offering two \$500 scholarships to nursing students in Arizona. They are seeking applications and essays through the end of September from nursing students in the state. There will be a panel of judges who will review the scholarship offerings and announce the winners at the December chapter meeting.

San Jose, CA

The San Jose Chapter is busy planning "Octoberfest" for their next meeting. Since this meeting aligns well with Case Management Week, many Case Management Week activities and recognition will also take place. The chapter wants to make it a real celebration, and have some fun at the same time.

Newark, DE

CMSA-DE is getting ready to kick off another successful year. To get this started, they will be hosting the annual board retreat on August 29. During this retreat, they will work on planning out the rest of the year.

Ft. Walton Beach, FL

Less than a year old as a CMSA affiliate, the CMSA Emerald Coast chapter looks forward to an eventful and energetic new year. Many thank Capt. Stephanie Kennedy for her leadership and guidance over the past year as president. Many well wishes to her & her unit in their overseas deployment, and prayers for their safe return. The chapter anticipates an exciting year and welcomes the new officers. They are planning a fun holiday event as well as some ideas to help increase membership and participation. The chapter continues to meet every third Tuesday during lunch.

Chicago, IL

The Illinois Case Management Network is starting off the 2005-2006 season with a big change. They are looking at changing their name to something that will help clarify who they are and whom they are associated with. The chapter was able to send six of their Board members to the National Conference. Everyone had such a great time and enjoyed meeting the other chapter leaders. During the leadership conference, the board learned many terrific ideas on improving the chapter. They have new ideas for membership and have set a target of 50 new members this year. The chapter is also going to hire an administrative secretary to help with Chapter needs. Thanks to everyone for your fantastic ideas! The chapter has also begun planning for their Spring Educational Conference, to be held April 25, 2006. The tentative title is "The Beat Goes On- the Heartbeat of Case Management".

Raleigh/New Bern, NC

For the 2005-06 term, the Triangle CMSA Chapter has made changes in meeting times. This year the monthly meetings will be moved to a quarterly meeting format with two (2) hours of educational CEs and one (1) hour networking and business meeting. A recent quarterly meeting was held in conjunction with the regional conference, held Aug 11 & 12. The theme focused on the Grammy Award concept and the title of the conference was: "And, the Winner is...Case Management".

Albuquerque, NM

This year, The Rio Grande Chapter established a community project goal. They chose to support the Women's Community Association that provides shelter for women and children who are victims of domestic violence. They are supporting this organization by collecting kitchen, bedroom, first aid supplies and toys for its residents. Donations are accepted at the monthly meetings and then delivered monthly to the Shelter. In addition, the chapter is supporting a CCM Prep Course as a pre-conference session on September 28. National CMSA President Susan Rogers RN, BSN, CCM, will be conducting the course.

Oklahoma City/Tulsa, OK

CMSA-OK is busily finalizing plans for their 12th annual educational conference in Tulsa at the Southern Hills Marriott on October 25 & 26. The theme of this year's conference is "Win, Lose or Draw with Case Management". Keynote topics include: "Why Betting on Good Leadership is a Gamble" from Bill Borne, the 2004 Forbes Entrepreneur of the Year; and "Beating Cancer with a CAN-do Spirit" by LeAnne Taylor, news anchor for the News on 6 and co-host of "6 In the Morning". Additional topics will be covered in three tracks: 1) Worker's Compensation Case Management; 2) Disease Management; and 3) Advanced Case Management. 11 hours of CEU will be provided.

Pittsburgh, PA

The CMSA Pittsburgh Chapter is preparing for the next educational program, New Oncology Treatment, on September 22 at Lidia's Pittsburgh restaurant. Leadership has been working to increase awareness of the local chapter to case managers and social workers by casting a wider net of mailings when a program is available. The chapter most recently purchased a list of CCMs for southwestern Pennsylvania in efforts to increase awareness and membership.

Chattanooga, TN

The goal of the Chattanooga, TN Chapter of CMSA for the coming year is to increase membership. Several suggestions for accomplishing this have been discussed at recent board meetings. The focus for celebrating National Case Management Week is going to be on members. The October meeting will be a sit down luncheon with a national speaker to present a light-hearted look at the role of the case manager. All members will be presented with a Case Management Week Pin. An invitation to all case managers in the area will be extended through an advertisement in the local newspaper and current members will be honored with their names included in the advertisement. Board members are obtaining items and gift certificates to be given away as door prizes. This will be an opportunity for case managers to sit back and be rewarded for the outstanding and compassionate work they do on a daily basis.

The chapter is using two registration tables for all meetings. One table for current members and the other one for visitors. Board members will host both tables. Members will be greeted and thanked for their ongoing support of the chapter encouraging them to maintain their membership. Visitors will be welcomed and encouraged to become members. The benefits of membership such as educational opportunities on current topics from national speakers at monthly local meetings, online CE opportunities, discounts to local and national seminars, networking and supporting their profession will be explained to them so they understand the enormous value they receive for their money. The membership committee is focusing on reaching out to all levels of case managers in the community.

Houston, TX

The Houston Gulf Coast Chapter always holds a retreat for the incoming board in September of every year. The new board is installed at the annual conference on August 18th for recognition but does not officially take over until September 1st. The board has an all day retreat and go over things from the past year that were successful and areas that need improvement. Then, they set the new budget for the upcoming year and plan all events that the chapter undertakes. Lunch is pot luck style with everyone contributing food and it is a really great ice breaker for the new board to start to function as a team. In addition, the board members are busy getting ready for the second annual Spring Fling cruise out of Galveston, TX on April 27, 2005. Wonderful fun and CEs from cruising through the Caribbean.

Milwaukee, WI

The Milwaukee Chapter Conference Committee is busy finalizing the details for the annual conference, "Into the Future with Innovation and Compassion", to be held on Tuesday, October 4, 2005. This year's conference should prove to be valuable to all with a great line-up planned! For details, you can contact the Chapter or see the highlights on the national website! Something new has been added this year. One of the speakers, Dr. Sridhar Vasudevan, has arranged a cocktail cruise after the program to which the attendees are invited! The chapter has arranged for bus transportation to and from this fun event, and the attendees are welcome to bring a guest! The chapter is currently looking for innovative and fun ways to increase membership. It is hoped that this conference and fun cocktail cruise will be just the beginning!

Delegating Responsibility

How can you help people in your organization prepare for future leadership roles and free up more time in your schedule so you can do other things?

DELEGATION

Delegation is the key to a successful organization. Sharing responsibilities keeps members interested and enthusiastic about the group. You might be reluctant to delegate because you want to make sure the job is done right (your way). But you can make members feel unimportant and become apathetic if you don't share the responsibility of making the organization a success.

Here are several good reasons to delegate:

Group Benefits:

- members become more involved and committed
- more projects and activities are undertaken
- a greater chance that projects will be completed
- increased opportunities for members to develop leadership skills
- more of a chance to fill leadership roles with qualified, experienced people
- the organization operates more smoothly

The Leader Benefits by:

- not being spread too thin and therefore is less likely to burn out
- gaining satisfaction seeing members grow and develop
- acquiring more experience in executive and administrative functions

An Appropriate Time to Delegate is When:

- there is a lot of work
- a member has particular qualifications for or interest in a task
- someone can benefit from the responsibility
- routine matters need attention
- details take up too much time and have to be divided

The Time NOT to Delegate is When:

- the task is something you would not want to do (menial work)
- someone is under-qualified or overqualified for the task
- the work is your own specified responsibility
- the area is big or is an unsolved problem, issue or matter dealing with the personal feelings of another or with confidentiality - the "hot potato"

There Are Many Ways to Delegate:

- ask for volunteers by a show of hands or passing a sign-up sheet. (Interest is a great motivator!) However, this method can be impersonal and you could be "stuck" if no one signs up.
- appoint or suggest someone. Sometimes a member lacks self-confidence and won't volunteer; appointing him/her demonstrates your confidence in him/her.
- assign through a committee. This takes the pressure off an individual and reinforces organizational structure.
- "best fit" of person with the task is the most effective. Try to spread the enjoyable and responsible tasks around, giving more members status and value.

Guidelines for Effective Delegation

1. Choose the appropriate people by interviewing and placing your members carefully. Consider his/her time, interest and capabilities. Specific responsibilities to be delegated to a particular person must be appropriate for the growth of that person at that time.
2. Explain why the person(s) was (were) selected for this task.
3. Delegate segments that make sense; not bits and pieces of a task, but share the "big picture". People like to know how their segment will help the larger program.
4. Discuss the task at hand. Discuss ideas; mutually set goals and objectives. Whenever possible, give those who will be responsible for carrying out a program a voice in the decision-making. Do not lower standards; don't insult your members!
5. Define clearly the responsibilities being delegated to each person. Explain what is expected of the person(s) and what the bounds of authority are. Be sure agreement is reached on areas where the person can function freely. The end result is important, not the various steps. Everyone accomplishes tasks differently.
6. Find out how you will know when they need help. Make sure they understand you are willing to assist but must first be told when and how you can help. Give accurate and honest feedback. People want and deserve to know how they are doing. This is both an opportunity for giving satisfaction and encouraging growth. Allow for risk-taking and mistakes.
7. Support your officers and committee chairs by sharing information, knowledge and plans with them. It is incredible how many errors are made simply due to a lack of information. Share their failures as well as their successes.
8. Delegate. Most responsible people do not appreciate someone looking over their shoulder, or taking back parts of their assignment before they have a chance to do it. As a leader, it can be hard for you to "let go;" you like being the doer. Let them do the job! Delegating does not eliminate work, it simply changes it. As you delegate appropriately, a multiplier effect occurs.
9. Follow up. Check periodically to see if people have any questions regarding how a project is supposed to be done. This will also let you know how that individual is progressing on the task. There is a fine line between delegating and following-up.
10. Evaluate the importance of evaluation. You must not overlook the need to evaluate and measure the extent to which actions conformed to plans, if the plans went well or if the original plans were appropriate and worthwhile. Use appropriate feedback techniques. One of your most important roles as a leader is to help your members to learn and grow through both their successes and their failures! Your members are your greatest resource. Let them create and turn their creativity into action!

Resource referenced from Student Organization Resources from California State University in Chico, CA.
<http://www.csuchico.edu/sac/Lead.html>

Communicating With Your Members

When associations' were asked to describe their retention efforts, one fundamental component of all answers was communication. Communications could include newsletters telling members what you've done for them or telephone calls from the board to see how the association is doing for members. These communications significantly influence members' retention decisions.

Characteristics of Communication – How to Get Your Message Out

1. **Timeliness.** One of the greatest association crimes is when members and other potential customers receive promotion materials after an event has occurred.
2. **Appropriate frequency.** How often do members hear from your association? Do members receive several different items separately all on the same day? These small annoyances add up and sway their renewal decisions. Avoid these problems by creating a master calendar of member communications.
3. **Appropriate format.** Rapidly developing forms of electronic communication are getting a lot of attention from associations. Decisions about what technologies to use are complex. Major factors include the level of comfort and flexibility your members have with technology.
4. **Right audience.** Associations have the upper hand here. By paying dues, members choose to be on your mailing list and receive your communications. In contrast, commercial vendors must first identify their market and then persuade people to open their mailings. Don't abuse your advantage by over mailing or sending out items that have little value.
5. **Proper implementation.** An informative electronic newsletter loses value if members have difficulty accessing it. Your communications can exhibit all of the four characteristics above and still be ineffective if improperly implemented. Members judge their association's performance on the basis of what's visible. If your association has trouble getting mailings out on time or can't spell names correctly, members will lose confidence in what they can't see, such as your ability to coordinate complex negotiations or effective lobbying activities.

Reasons to Communicate – What You Want the Message to Accomplish

There are five primary reasons for communicating with members:

1. **Identify members' needs.** Every time you ask your members what they want and need, you're obtaining valuable feedback. Survey formats vary tremendously—from a monthly newsletter to a multi-page survey. Perhaps some of the most critical issues are those concerned with “triggering events.” For instance, receiving a membership application and dues check may trigger your association to make a welcoming telephone call or new member survey. Similarly, an expiring member may trigger an exit survey. Another key triggering event is when new members sign up for their first meeting or seminar. Many associations have revised their activities after researching members' schedules of activities. The better the organization can identify triggering events, the better it can respond to members' needs.
2. **Contact members.** Association members usually want, need, and, to some extent, demand contact. Staying in close contact demonstrates that your association cares about its members. Mal-only contact can leave member feeling detached from the association.
3. **Inform members of products, events, and issues.** Perhaps the most prevalent objective of membership organizations is met through communicating with members: from a calendar of upcoming events to a formal education seminar, the need for information is often a primary reason to join. When asking experienced Board what advice they could give new Board regarding retention. The most common answer was, “Tell members what you're doing for them.” Don't assume that members see your association's accomplishments.
4. **Respond to members' needs.** Membership organizations typically respond to members' needs quite well. Responding to members' starts with simple actions. Members might not renew simply because they didn't get a call back as promised. More likely, however, the decision is cumulative. It results after members receive incorrect answers to queries, no responses at all, poor telephone service, or a monthly publication that missed the mark. Beyond answering telephones, it's necessary to get to the heart of retention: delivering the goods. What does the latest research show that your members want? How are you responding? What can be done to improve the situation?
5. **Involve members.** One key ingredient of retention is getting members involved in your association activities. When members become volunteers, the full value of membership (especially in the form of relationships with other volunteers) usually becomes evident, and the renewal decision is more likely a matter of commitment. Every communication takes the form of delivering goods to members, and, every communication affects retention.

Excerpt from article by Arlene Farber Sirkin and Michael P. McDermott, Authors of *Keeping Members, Myths & Realities*.

Careful Contract Review Is Crucial for Cost-Effectiveness *By Robin Roth, www.conferon.com*

Your contract with a hotel is the only guarantee you have that you'll receive what you expect and for the price you've agreed to pay. It's the only document that details all the costs you'll pay under any circumstances. Failing to review a contract completely and efficiently can be a costly mistake, but sitting down to do it can be quite overwhelming. Careful, informed contract review is important because it can save you from spending unnecessary money or from being charged unfairly. Convene recently asked Robin Roth, senior contracts editor for Conferon, Inc., to provide some insight for meeting planners about how to conduct the review process. Here's what she had to say:

Convene: When a contract arrives on your desk, what specific steps do you take in reviewing it?

Roth: Reviewing a group sales hotel contract can be time-consuming and confusing. If you are a meeting sponsor, you seek a fair agreement that accurately and comprehensively covers your meeting arrangements. When you receive the contract from the hotel, you must closely examine a document that is often one-sided in favor of the hotel, vague in many places, sprinkled with errors and typos, contradictory, and missing essential language. It is helpful to examine the contract twice. First, look at everything that is there and identify the terms that need to be rewritten, changed, or deleted. Second, look at the contract again for what is not there that needs to be added.

Convene: How do you deal with vagueness in a contract?

Roth: Surprises are not welcome once a customer has signed a group sales contract with a hotel. Contract language should be as clear and specific as possible so that both parties know exactly what terms they have agreed to. The group should not be faced with unexpected charges, have a different understanding of how future rates are to be calculated, or arrive at figures for attrition or cancellation charges that are poles apart from the hotel's. They shouldn't even debate whether there is attrition in the contract in the first place! The planner should check each term of the contract to be sure that all items have been clearly spelled out. Legalese that isn't understandable should be rewritten in plain language that is clear to both parties. It is helpful to beware of words and phrases like "reasonable," "at the hotel's discretion," and "meeting room rental may (vs. will) apply." Concession terms provide an elementary example of how to avoid being vague. These terms should state whether the concession is complimentary or upgraded at the group rate, state for how many nights the concession is offered, and be specific in detail such as "four complimentary round-trip airport transfers" or "four complimentary welcome VIP amenities." Also, if concessions are tied to pickup (usually 80 percent), most contracts just state that the concessions will be renegotiated. Rather than leave the issue open, the contract should state exactly how the concessions would be affected in the event of a shortfall. For example, if the hotel were to provide one complimentary one-bedroom suite, the contract could state that if less than 80 percent of the room block was picked up, the suite would be provided at the group rate.

Convene: How much negotiation and willingness to make changes do you usually expect from a hotel property?

Roth: On business issues, most hotels are empowered and willing to negotiate. These areas often include rates, dates, space, concessions, room rental, service ratios, etc. Negotiations can be more difficult when you are requesting material changes to the legalese or the liabilities associated with the booking. Many hotel sales personnel need to refer requested changes to clauses such as Force Majeure, arbitration, or indemnification back to their corporate legal departments. If you request changes to the liability issues (such as attrition and cancellation), your requests can often send up red flags to hotels. Requesting a better cancellation clause can be interpreted to mean that you may have a higher risk of canceling. Requesting improved terms of attrition can be interpreted to mean that you are unsure of your ability to pick up the block.

Convene: Do you have any specific advice/tips to remember for new meeting planners reviewing their first contracts?

Roth: Reviewing a first contract can be an overwhelming experience for a new meeting planner. There is a great deal of information covered, and the subject areas may be overlapping or even combined. This makes it difficult to ensure that each topic is clearly and accurately covered. A rule of thumb is that each important topic in the contract should be covered separately under its own clause. For room block performance there should be only one clause, usually attrition or a meeting room rental sliding scale tied to room block performance. Make sure that room block performance is not tied to another major area like food and beverage performance or cancellation. Also make sure that if there is no room block performance that it is so stated in the contract. Cancellation should also be a separate clause - a sliding scale based on date of cancellation and with just a percentage of room revenue as the charge, not including other forms of revenue. Note: *This information is not intended to be legal advice. A qualified attorney should be consulted to review all contract issues.*