

THE CHAPTER DISPATCH

December 2005

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AT A GLANCE – Important Dates

Mark your calendars!

2006

January

- | | |
|--------|--|
| Jan 1 | Chapter Innovation Award Entries accepted |
| Jan 1 | Nominations for Chapter Presidents' Council Rep begins |
| Jan 15 | Annual Financial Reports due to National |
| Jan 15 | 990 EZ or 990 Form due to IRS |
| Jan 19 | CMAG Advance in Long Beach, CA |

February

- | | |
|--------|---|
| Feb 6 | Online Poll Open for National Board Elections |
| Feb 14 | CMOY and AOSE Nomination Deadline |

March

- | | |
|--------|--------------------------------------|
| Mar 15 | CPC Election Opens – Presidents only |
| Mar 20 | National Board Election Closes |

April

- | | |
|--------|---|
| Apr 15 | Deadline - Award of Excellence in Adherence Management (AEAM) nominations |
|--------|---|

NATIONAL UPDATES

Fall 2005 Member Get a Member Campaign

Many chapter members kicked it up a notch during the Fall 2005 Member-Get-A-Member Campaign! There was more participation than ever before and the results are very exciting. 80 new members were recruited by chapter volunteers in just a 3 month period!

This Campaign winner is Jim Sepeda of San Jose, CA! Jim brought in **20 new members** during this period. *Way to go Jim!* Jim will receive a free CMSA Annual Conference registration, a free annual CMSA membership, \$100 in CMSA Bucks and a CMSA Member Pin.

All Recruiters bringing in at least 5 members received a free annual membership. In addition to Jim, these Recruiters will receive an annual membership, \$5.00 CMSA Bucks for each Recruit & a Member Pin:

- **Laura Bachrach, Phoenix, AZ - 5 new members**
- **Elaine Halloran, Long Island, NY – 7 new members**
- **Sylvia Pena, Woodridge, NJ – 7 new members**

All other participating Recruiters will receive a \$5.00 CMSA Buck for each Recruit and a Member Pin:

Recruiter	# Recruited	Chapter
Bartz, Brenda	1	WI3
Bassham, Lora	1	AR2
Beil, Marjorie	3	IL1
Berry, Paula	1	MA1
Bishop, Jennifer	1	FL9
Colahan, Sandra	1	CT1
Corcuera, Tessie	1	IL1
Davis, Pam	1	TN1
Diaz, Deanna	1	AZ1
Edwards, Villa	2	TN2
Eileen, Roddy	1	NY3
Eisenberg, Carol	1	CT1
Erthal, Debbie	1	PA13
Foell, Doris	1	CT1
Gershen, Joan	1	NY3
Hanrahan, Adrienne	3	IL1
Herdade, Diane	3	MI1
Kipp, Kristi	1	NTL
Konrath, Shirley	1	IL1
Lawrence, Patricia	1	CT1
Lusch, Gina	1	PA13
Newman, Mary Beth	1	CT1
Phipps, Diane	1	WI1
Sefakis, Audrey	1	MA1
Smith, Ann Marie	1	NY3
Smith, Stacy	1	IA1
Snapp, Tina	1	CO1
Spath, Lorea	1	CT1
Tiukinhoy, Emylou	3	NY1
Vamvakis, Margie	1	CT1
Van Bladel, Yvonne	1	IL1
Welker, Janet	1	MO2

Nominate Your Colleague for CMOY or AOSE

Now is your chance to recognize a peer who has significantly impacted the field of case management. Each year, CMSA presents two prestigious awards to members whose case management careers elevate professional standards, enhance individual and leadership performance, and exemplify merit and distinction. CMSA extends an invitation each year to its members to nominate a well-deserving colleague for one of the individual awards by Feb. 14.

AWARD OF SERVICE EXCELLENCE (AOSE)

Deadline: February 14, 2006

CASE MANAGER OF THE YEAR (CMOY)

Deadline: February 14, 2006

Winner of each category receives:

- Official Award Ceremony Recognition at Annual Conference
- Personalized Crystal Award
- Complimentary Conference Attendance
- Hotel Stay (3 nights)
- Coach Airfare (subject to CMSA Travel Policy)
- One Year Complimentary CMSA Membership (National & Chapter)
- President's Award Reception
- National Press Release (Post-Conference)

Visit www.cmsa.org/Professional/Awards to download forms and view previous award winner listings. Contact CMOY/AOSE Staff Liaison, Spring Houk, at shouk@acminet.com or (501) 225-2229 ext. 47

Award for Excellence in Adherence Management (AEAM)

2006 Award Entry Deadline April 15, 2006

The second annual national AEAM will be presented at the CMSA national conference in June, 2006. The award is supported through an unrestricted educational grant from Pfizer, and the deadline for entries is April 15, 2006. Created to acknowledge individual case managers who demonstrate excellence in applying CMSA's Case Management Adherence Guidelines (CMAG) and use of the online CMAGTracker tool, the AEAM includes a cash award of \$1500 and a plaque. Entries are open only to CMSA members who have attended a CMAG training workshop.

Applicants must complete the following activities:

1. Register to use the online CMAG Tracker system.
2. Enter assessment data from at least one patient into the CMAG Tracker system.
3. Submit an essay describing the applicant's activities to improve patient adherence to prescribed medications using skills or strategies learned in a CMAG workshop. Case manager essays may address any of the following activities, but must specifically reference CMSA's Case Management Adherence Guidelines:
 - A case study of one patient whose adherence improved through the case manager's use of motivational interviewing
 - Population based activities conducted by the case manager to improve medication adherence in a group of patients
 - Training and education activities of the case manager to improve adherence management practices of other case managers.

The award decision will be made by an advisory committee appointed by CMSA. Winners are not required to be present for the award. All essays must be submitted electronically and become CMSA property. Go to www.cmsa.org/cmag for all rules and details.

Your Chapter's Fiscal Period

All CMSA Affiliated Chapters fiscal year just concluded August 31. For some of you, this means a time to transition officers. *For all of you*, this means it is time to begin planning and strategizing for the next fiscal year. Financial reports for the past fiscal year can begin being compiled. Budgets costs for the next year should be discussed. For more information on the financial obligations of the organization, please see the Treasurer's Guide at: <http://www.cmsa.org/PDF/Chapters/ChapterTreasurerGuide.pdf>. This is also a good time to set chapter goals and reflect on past year's accomplishments.

Chapter Presidents' Council Rep

Be a National Board Member and the voice of the chapters! This liaison position is the voice for the chapter leaders to the National Board and shares industry issues, requests, needs, and solutions related to chapters. This position is elected by the Chapter Presidents beginning March 15. Term of Office will begin June 2006 during CMSA's Annual Conference.

Nominations packets will be emailed to all Chapter Presidents by January 1, 2006. If you do not receive yours, please contact mlee@acminet.com for a copy. See your packet for eligibility criteria or contact the National Office. Nominations must be postmarked by March 1, 2006. You may also contact the current CPC Rep, Teri Treiger, for more details of this position. Teri can be reached at teri.treiger@comcast.net.

Local Chapter Award Competition

Enter your chapter's best projects in CMSA's 2006 *Chapter Excellence & Innovation Awards (CEIA)*. Entries will be accepted from **January 1 until April 30**. Visit www.cmsa.org/professional/awards/ceia/ to find out more and to download award entry forms.

Judged by impartial individuals outside of CMSA according to set criteria, the CEIAs recognize chapters that embody CMSA's Mission – *Advancing Case Management!*

Recipients of these awards will be recognized at the Texas 2006 Annual Conference for promoting the growth and value of case management and supporting the evolving need of the case management professional.

Tips on Entering the Competition:

- Fill out the entry forms as completely as possible. Judges look at the description on the form, so provide information as completely, yet concisely, as possible. Supporting reports, brochures, videotapes, and photos are optional, but welcomed.
- Concentrate on the goal, its impact, the outcome and significance of the success. While numbers are very important, also include how the activity improved the lives of those involved or the community at large.

Chapter Excellence and Innovation Award Categories:

- ⇒ Best Use of Technology
- ⇒ Conference
- ⇒ Educational Programming
- ⇒ Membership Development
- ⇒ Print

LETTER FROM YOUR CPC REP

Greetings Chapter Leaders,

This time of year seems to bring out the 'giver' in all of us. To take the giving theme one step further, I am issuing a challenge to all chapters . . . Give the gift of recognition and nominate a deserving chapter member for the National Case Manager of the Year (CMOY) and/or the Award of Service Excellence (AOSE)!



It is always nice to be recognized for a job well done. From time to time, when someone tells you "Thank you, you really helped" or "You are very kind to help me with all this" it really makes a difference in your day. Taking the time to recognize a peer for their hard work is a very special way to acknowledge their accomplishments. From personal experience at last year's conference, watching someone you know receive one of these awards is very exciting.

Because a number of chapters already have awards for case manager of the year and service excellence, doesn't it make sense to take the next step and submit your local winners for the national awards? Links to the award applications appear front and center on the CMSA homepage (www.cmsa.org). You can not miss it. The deadline to submit nominations is February 14, 2006. It may sound a ways off, but we all know how time flies so do not delay. Download the nomination form begin the process today! If the application looks like too much work for one person to do, split up the responsibility amongst a couple people so no one person is overwhelmed. Make it a team effort!

Let's all make a concerted effort to submit at least one nominee per chapter and really demonstrate what a tremendous talent pool we have within our membership.

With warmest regards this holiday season. Good health to you and yours throughout the coming year.

Teri Treiger
Your 2005-06 CPC Rep

CHAPTER HIGHLIGHTS

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

Pending Chapters

Lexington, KY

The Bluegrass State Chapter is getting lots of calls and has scheduled speakers up to May 2006. Some of the local doctors and vendors have already responded well to the organization. The Board met this month to solidify the program for Jan and get things rolling for 2006. Dr. Mortara spoke at their last meeting for 1 CE hour. He is interested in working with other chapters in the area, also. He is a retired neurosurgeon who is currently performing IME's in the local area. Thanks to National for all their help. The Board is glad that everyone is enjoying this chapter. They are currently maintaining about 20-25 regular attendees and this is without a membership chairman! The group sends about 100 letters/emails on a monthly basis. This group is considering the development of a newsletter to send out the meeting invitation, and news of what is going on to help increase the level of excitement.

Las Vegas, NV

The Case Management Association – Las Vegas (CMA-LV) celebrated their first year as a case management organization at a holiday gala on December 6. CMA-LV's first annual business meeting and holiday gala was hosted by CareMeridian at their newly opened Las Vegas facility. Attendees heard about highlights from the CMA-LV business plan for 2006 including their intent to become an official chapter of CMSA and to host a year long CCM study course for all interested parties. Ellen Aliberti reflects back on their first year and is so pleased with the interest level that they have found in the Las Vegas CM community for this organization. Ellen says she is duly impressed with the caliber of Case Managers that volunteered for the first CMA-LV Planning Committee and acknowledge that they are truly the reason for the success. As the President of CMA-LV, she thanks all of the Board members and all of their meeting attendees that have contributed to a successful first year. The group looks forward in eager anticipation of the wonderful things that they will accomplish together in 2006.

Official CMSA Chapters

Birmingham, AL

The Tuscaloosa Extension of Birmingham is going through a transition of being a pending chapter to becoming an arm of a well established chapter. This added support and resource has renewed an excitement in the group. The Extension recently met and will begin working on their Annual Goals to present to the Chapter. They also discussed ways they could show local support. Fliers from the Western Alabama Workman's Comp Organization were distributed and discussion was led about meeting with the President of that group to explore the potential for a joint conference early next year. The group also planned their first two lunch meetings, speakers and topics for Jan & March of 2006. Additional discussion included some thoughts on creating a bi-annual newsletter and how to add visibility through a website.

Phoenix, AZ

The last quarter of 2005 has been a busy one for the CMSA-AZ chapter. They held their annual conference in September, which was enjoyed by all who attended. They also held several meetings in Tucson to address the needs of case managers in that area. The chapter has increased their membership through these activities, which is exciting.

For the holiday season, they made several cash contributions to the community--\$500 each to Desert Mission (food bank/community support services) and Phoenix Children's Project (inter-city youth program). They also awarded three scholarships of \$500 each to nursing students in Arizona at the December chapter meeting. Each recipient of these scholarships wrote a short essay on case management in order to qualify. The December chapter meeting also generated a large donation of toys for the local "Toys for Tots" campaign. The group is excited about the ability of the chapter to assist a variety of people in the community and have plans to continue to do so over the next year.

Dade/Broward County, FL

The chapter of South Florida Case Management Network wishes everyone a Happy and Healthy Holidays. They are working hard on their Holiday Party for this year. They are having the Holiday Party at the Hard Rock Seminole Café and have invited all the Case Managers in the area to attend. All attendees must bring an unwrapped toy. The toys will be delivered by the chapter personally to the Community Homeless Shelter in Miami to all the Children that are staying at the center. They are also planning a movie night out for their next membership drive. Stay tuned for the previews!

Panama City, FL

The Bay Area Case Management Society of America had their yearly Christmas party and Membership Drive on December 1. The group shared information on the benefits of joining CMSA and had packets readily available for sign up. Good turnout and introduction of new officers for 2006. They signed up 3 new members during this party.

Chicago, IL

Formally Illinois Case Management Network, the chapter has officially changed their name to CMSA Chicago. This fall they have had great success at their evening education meetings. The chapter has been meeting at fabulous restaurants with wonderful speakers sponsored by the provider community. Their meetings have been well attended. CMSA Chicago had 60 attendees on November 8 with a topic presentation on *Emergent Mgmt of the Polytrauma Pt (Pelvic Ring Disruptions)* by Dr. Matthew Jimenez/Chief of Orthopedic Trauma Services/IL Bone & Joint Disease. The chapter received lots of positive comments - "great speaker/presentation, fantastic dinner & applicable topic, info that I can use in CM practice, etc". In response to a member request, they will have their Dec 6th dinner meeting in the city (Chicago) with a topic of *Hemophilia Management* sponsored by Accredo Health Group.

The chapter has also been actively involved with planning for their annual conference which will be held on April 25 at the Drury Lane in OakBrook, IL.

Ft. Wayne, IN

The Fort Wayne Chapter of CMSA had its annual Gifts & Gathering event at the Fort Wayne Summit Club on December 5. Home Nursing Services, Heritage Medical Staffing, Angel Corps, and Dorian Maples and Associates were the sponsors for this event. The local board has started a tradition of having a guest speaker from a nonprofit agency and providing a financial support to that agency. This year the guest speaker was Melissa Barile, MS, Regional Director of The Greater Indiana Chapter of the Alzheimer's Association. The CMSA members brought additional financial gifts to support the Alzheimer's Association. Members enjoyed the social time with appetizers to catch up on life at work and at home. Having the event at the Summit Club provided a beautiful backdrop for all to enjoy at this special time of year. About 30-40 attendees came to celebrate the Season. A sincere thanks goes out to their sponsors in making this event available to the CMSA members and guests.

Indianapolis, IN

A wish of Happy Holidays is extended to all from The Central Indiana CMSA. Implementation of plans is underway for fiscal year 2005 – 2006 for Central Indiana CMSA. They have had the Installation of Officers and Directors and have held the first board meeting. A new committee has been formed - Public Relations. This committee will assist the Membership Committee to retain present members and recruit new members. Those who serve on this committee designed the Central IN CMSA booth for the October 2005 conference and will “man the booth” at Chapter meetings to promote the values of membership.

The December Chapter meeting at the Adams Mark Hotel, is a time for case managers to come together to share experiences and relax for the coming year. Two local charities have been named to receive contributions of needed items.

New Orleans, LA

The members in Greater New Orleans are doing a little better but it is very slow going for many people, including some of their board. They are currently trying to get together a board meeting for early January. This will be the first meeting since Hurricane Katrina. It is hard to believe but many parts of New Orleans still do not have electricity and city services. People around the country need to know that their area is still devastated and trying to recover and it will be a very long process. The chapter was in the midst of transitioning the officer's positions when the hurricane hit and things have been very chaotic since then. The chapter wants to again express their gratitude to all of the chapters who have been so supportive with emails, prayers and donations. It has been wonderful to have the support of this great organization and its leaders. It has meant so much as they begin the recovery process. A very heartfelt "Thank You" goes out to everyone from CMS-GNO!!

New England (MA, ME, NH, RI)

CMSNE is in full gear planning educational sessions for 2006. Their 7th Annual Leadership Building Strategies Conference will be held March 15 at the Renaissance Hotel in Bedford, MA. This year's program, *Weathering the Storm - Building Strategies for Managing the Changing Healthcare Climate*, will focus on legal perils and pitfalls, dealing with difficult people, time management skills and building a cohesive team. Speakers include Lynn Muller, RN, BSN, JD, CCM; Jack Agati and ML Hannay both local NH residents, but nationally known speakers. Over 15 sponsors/exhibitors have been confirmed to round out the educational experience of the attendees.

Plans are underway for their 17th Annual Conference, *Case Managers Navigating the Maze of Healthcare*, to be held in beautiful Cape Cod on September 14-15. This year's conference will focus on case management as a guide through the maze of healthcare. The Call for Papers for breakout sessions and posters will be available and distributed in mid January. Proposals are being considered for the following tracks:

- Hospital (acute/chronic facility)
- Insurance - Disability/Worker's Compensation
- Insurance- Managed Care/Group Health
- Ambulatory/Community/Chronic
- Geriatric/Long Term Care/Assisted Living

Topics for consideration under each of these career paths may include but are not limited to establishing a case management department, challenges/obstacles, goals, regulatory issues, new research, education, organizational tools, basics, evaluation processes.

The chapter will again co-sponsor with CCM Associates, the always-successful *Preparing for Case Management Certification*, on March 24-25 in Wellesley, MA. For information about any of these educational programs please visit www.cmsne.org, email cmsne@cmsne.org or call 603-329-7481. The chapter wishes you and yours a holiday season filled with special memories and blessings.

Albuquerque, NM

The Rio Grande Chapter's annual Holiday Party was December 8. The chapter provides this free as a gift to their members. The membership committee makes all the arrangements for the evening. They had an evening dinner with a "pay as you go" bar at a local county club. It is a nice change from the monthly breakfast educational meetings. Their community partners and non-members are invited but non-members do have to pay for the cost of the dinner. The first 10 members who brought a non-member got them in for free in hopes of recruiting them as new members. This annual event has grown over time and is always well received by the case managers in the area.

This year, the chapter has taken on a community project. They selected a local Women's Shelter and since August, has been collecting items at their monthly meetings for them. This included personal items, toys for children, linens, pots and pans and any useful items for the shelter. At the November meeting, they collected food items and gift cards to local grocery stores to help with their Thanksgiving celebration. At the holiday party in December, they collected unwrapped personal gifts for women and new toys for children for them to use in their holiday celebration. This is the first year the chapter has done a community project and there has been a great response from the members in supporting it.

Long Island, NY

The Long Island chapter had two of their CMSA members, Karen Hartman, RN, CCM & Dolores Fleischmann, RN, CCM write an article which was published in the November 2005 *Nursing Spectrum*. The article was "Brian's Tale". In a short synopsis, a little boy who was dying of Malignant Anaplastic Ependymoma diagnosed 3 years ago. These two case managers assisted mom & dad throughout the 3 years in coordinating his care completely & assisted him with the Make a Wish Foundation. The article also showed the impact this little boy had on Karen's own life. The child passed away August 23, 2004 but mom remains to keep in contact with Karen for her support.

New York, NY

In celebration of Case Management Week, CMSA-NYC Chapter held a meeting aboard *The Spirit of New York* ship and cruised down the Hudson River past the Statue of Liberty and back. Dr. James Sapala, Bariatric Surgeon, spoke on the subject of obesity and surgical intervention. The attendees dined on a sumptuous buffet, danced and numerous prizes were dispensed. It was a fabulous celebration! Tickets for the meeting were sold out quickly. It was so well received that the CMSA-NYC Board has decided to make the cruise an annual event.

In New York, many of the members commute to the city from the boroughs of Manhattan and/or from New Jersey and Connecticut on a daily basis. So, meetings must be held in locations that are close to transportation. The time frame for the meetings must be very tight, since most people have to commute via public transportation to get home. Additionally, they have an average attendance of 96 members. So, there is the issue of cost for a place that can handle a large number of people for dinner and a meeting. All of their meetings have been traditionally held in mid-town New York City. The board made a decision to reach out in an effort to accommodate the large number of members associated with the health plans located in lower Manhattan. Their Holiday meeting was held in lower Manhattan. Attendance was excellent and there were a good many new faces present. Hopefully, new members will be attracted as the result of this effort. Future planning will include alternating meeting sights.

Chattanooga, TN

Chattanooga Chapter CMSA held their monthly meeting on December 13 at the Chattanooga Marriott. The program was "Getting to Know You" – *Case Managers Meet Complimentary and Alternative Medicine Providers!* There was a Vender/Information Fair venue highlighting what is more and more a part of healthcare in the country today - Complimentary and Alternative Medicine (CAM's). Information for the

five categories of CAM's recognized by The National Center for Complementary and Alternative Medicine, Alternative Medical Systems, Mind-Body Interventions, Biologically Based Therapy, Manipulative and Body-Based Methods and Energy Therapies were provided. This information will aid case managers in how the various treatments interact and options available as they help clients through the healthcare maze. Food stations were set up throughout the event so attendees could lunch while they visited the different booths.

Plans continue for their annual spring seminar April 21, 2006 which coincides with the chapter celebrating the tenth anniversary from when they began formation.

Dallas, TX

Happy Holidays! The DFW Chapter hosted the annual Holiday Party December 13. The theme for the party was Holiday Round-up, keeping to the theme for the upcoming Annual Conference, *Deep In The Heart Of Case Management*, to be held February 9-11. Everyone enjoyed a down-home country BBQ buffet and western music. One objective for the party was to gather non-perishable food items for area Food Banks that were stretched during the Katrina & Rita recoveries.

The first Medicare Part D presentation was held November 28. Patti Grady provided Part D information to a group of seniors in Richardson, Texas. The Chapter is providing these informational presentations in cooperation with National & CMS. Several Chapter leaders have received training to be presenters. The presentations are available to any group interested in learning more about Medicare Part D.

The Chapter collaborated with the West Texas Case Management Society to present a CCM Prep class on December 3rd. BK Kizziar, Chapter Executive Director, taught the all day class and Julie Carroll, Chapter President, was present at the exhibit booth to provide information about CMSA. The WTCMS is considering affiliation with CMSA. The DFW Chapter is supporting them in this effort.

Houston, TX

The Houston/Gulf Coast Chapter had their first board meeting at The Hampton Assisted Living Residence on November 15. Their membership is currently involved in Medicare Part D training. Training sessions to the public have been completed at the Oasis Senior Assisted Living Ctr, Pine Gate at Shadowlake and Home Health Resources of Clearlake. Sessions are planned for all of The Hampton Assisted Living Residences in the Houston area. All sessions have been free of charge to the general public. The chapter is also in the planning stages for a CE dinner presentation in addition to the regularly scheduled January luncheon. This will be free of charge for the members and sponsored by the Hampton Assisted Living Residences. The sessions have been well attended. They are especially pleased with the efforts on this public service project.

Montpelier, VT

The Green Mountain Chapter celebrated CM Week in style with speaker Zail Berry, MD discussing Palliative Care. They dined at the Hampton Inn and Conf Ctr in Colchester, VT, celebrating members and non-members working in case management. Chapter members were treated not only to a lovely dinner and opportunity for education but also recognized with a gift to remind them of their efforts to educate, collaborate, advocate and communicate - plants the seeds for successful interactions with those they serve.

The annual conference is scheduled for April 28 at Lake Morey Resort in Fairlee, VT. They are excited to present a number of exceptional speakers on the theme: *Self Directed Care, Promoting Patient Autonomy*. Speakers include: Dr. Claudia Osborne, Author of "Over my Head: A Doctor's own Story of Head Injury from the Inside Looking Out"; Dana Louria, JD, MSW on legal issues with the disabled and elderly; Suzanne Groah, MD, of National Rehab Hospital in Washington DC, presenting health promotion for physical disabilities; and Tom Brennan, UVM Men's Basketball Coach. Stay tuned for more information or visit their website: www.greenmountianchapter.org.

Succession Planning and Future Leaders

Characteristics of an Effective Succession Plan

- Goes three years out
- Outlines information transfer
- Includes contingency planning
- Includes mentoring
- Provides "career path"/road map for chapter leadership
- Instills enthusiasm and fun
- No twisted arms
- Has support from past leaders
- Draws from a pool of qualified, credible candidates

Barriers to Effective Succession Planning

- Volunteer Burnout
- Significant time commitment
- Succession plan is last minute
- Lack of training
- Loss of momentum
- Not enough people in the pool
- Don't articulate value of leadership
- People get stagnant or in comfort zone and won't give up position
- Life changes - family commitments, babies, job changes, transfers
- Haphazard - each leader recruits successor and the effort isn't coordinated
- No one person is accountable
- Lack of employer support

Identification and Training of Potential Leaders

- Create a leadership institute - open to all members; provided at no cost; multiple sessions (6-8); covers various aspects of chapter leadership and leadership in general
- Provide professional development for board and committee members, covering topics such as facilitation, meeting management, etc.
- Strong committee structure
- Use member meeting evaluations to gather names of people who are willing to volunteer. Follow up quickly.
- New member orientation
- New member contacts directly from president/senior leadership
- Board buddies - executive board support for others
- Have a Director of Volunteers
- **ASK, ASK, ASK**

MEMBERSHIP RESOURCES

Steps to a Successful Membership Sale

FIRST, the Recruiter makes personal contact with the prospective member.

SECOND, the Recruiter gets to know the prospective member, asking open-ended questions and listening to the answers.

THIRD, continuing the conversation, the Recruiter attempts to learn the prospect's interests and concerns.

FOURTH, the Recruiter gets the Prospect to agree on a position on an issue or concern that can lead to a successful membership "sale".

FIFTH, the Recruiter shows the prospect how the Association ties into the prospect's issue or concern, offering an answer, a way to a successful resolution of a conflict or the means to achieve a goal.

SIXTH, the Recruiter finally explains the advantages of Association membership, specifically concentrating on the prospect's key areas of concern.

SEVENTH, the Recruiter attempts to cement or close the membership sale.

NOTE: These steps may be undertaken by the Recruiter immediately, or after consultation with the other members of the Membership Team. The next scheduled contact should be initiated either by the Recruiter or by another individual whose participation would be helpful as indicated by the results of the vital first four steps in the process.

HOT TIP: When you talk to a potential member, avoid asking, "Would you like to join?" It's too easy for the person to say, "NO!" Instead, get to know the potential member. Talk about her/his needs and how the Association can meet them. Hand over a completed membership form and a pen. Assume you've made the sale!

Planning to Overturn Objections

LISTEN to the potential member's concerns and objections.

PLAN a strategy to deal with the objection.

OVERTURN the objection by giving additional information.

SHOW VALUE in membership and unity.

Some Tips for Overcoming Objections

- Keep asking. People do not even notice you are asking again. Make the potential member your project until he/she joins.
- Don't argue, agree or disagree with the potential member. If attempts are made to get you to argue or defend, responding with a question will keep the potential member talking.
- Listen to what is being said. Continue to use listening skills while the objection is being fully expressed.
- Refrain from responding to an objection immediately.
- Keep the potential member talking after the objection is raised---ask open-ended questions reflecting on what's been said. This helps the person "talk it through" without your arguing or defending.
- Determine if the objection is firmly held by observing whether or not the potential member sticks to it.
- Listen carefully until it's your turn. Then check out your statement of what you believe the objection is before you respond to it. (Often people merely want to get "something off their chest"; in this case, just hearing them out is what is required.)
- Don't underestimate your own reasons for joining. An enthusiastic member is the best person to sell the organization.

Welcoming and Involving New Members

A large part of managing change in any membership organization involves welcoming new members. The key is to bring new members into the chapter family as quickly as possible.

The following steps are keys to that success:

Time your meetings so new members can attend

- Pay particular attention to member needs relative to their workday and geography.
- Be sure to go to them to get this information.
- Strive for ease of participation.
- Members will be active in the group that makes it most convenient for them.

Go out of your way to personally ask new members to attend

- Hold an orientation meeting or "Newcomers" meeting regularly aimed at all your new members who either have never or infrequently attend meetings.
- Divide the new members among the officers and make phone calls extending a personal invitation to each new member.
- Encourage old members to bring a friend.

Establish a "Designated Host" System

Have you ever attended a meeting in which you didn't know anyone, and watched the old members of the group chat happily away throughout the meeting while you tried to blend into the wallpaper?

Were you anxious to go back for a second meeting? The purpose of the designated host is to "make sure" anyone attending a meeting for the first time has an enjoyable experience.

- Designated hosts are positioned at the door to watch for new faces.
- When a new member arrives, the host escorts them throughout the meeting, introducing them to everyone, explaining what's going on, translating when appropriate, etc.
- By the end of the meeting, the host should know as much as possible about the interests and background of the new member so a suitable position can be assigned quickly.
- Past presidents make excellent designated hosts.

Create a Mentor System

- This system works off the buddy principle in which each new member is teamed with a more experienced member.
- The senior member is expected to get to know the new member, act as their guide, and figure out how the new member can best be involved in the group.

Plan a New Member Project

- If a number of new members arrive as a group, develop and assign a project to them as a group.
- Such a project quickly gives them a sense of ownership and control in the activities of the organization.
- It also benefits the chapter by identifying those among the new members who are creative and able to fulfill leadership positions.

HOW TO DEAL EFFECTIVELY WITH YOUR LEGISLATURE

1. Do not panic. Many issues that seem out-of-hand at first can end up going nowhere or have little impact if the tide of public opinion turns strongly against the issue. Get all of the facts first -- then decide on your plan of action.
2. Research thoroughly. Many times careful, detailed research of a problem or issue can bring to light new methods of compromise or give seemingly radical ideas some substance. If nothing else, you will be well-informed on all aspects of a particular issue and be able to defend your position accurately.
3. Develop a "grassroots" network. Even in small states, it is impossible to know each legislator well. In this area, your colleagues in each district can be of tremendous assistance. They are the voters and constituents in a legislator's district and can be invaluable to a representative or senator during election time. These people do get heard, often times more loudly than your organization does as a whole. Effective use of this system cannot be overstated.
4. Keep your people informed. At least once a week; more often if possible. There is no substitute for good communications with both your organization and outside organizations. This includes legislators. It is imperative to keep them informed of any new developments or positions your organization may have taken.
5. Work both houses of the legislature daily -- meeting with legislators on a regular or daily basis is another important part of communication. Visibility is the key here; let them hear your views -- the more often the better if you have something new of which to inform.
6. Present your side of a position fairly, logically, and factually. Highlight the strengths of your position and be prepared to deal with your weaknesses. Try to distill the issue(s) down as much as possible. Never threaten, harass or try to intimidate a legislator. They function in a high pressure environment and have been intimidated by the best. The least you will gain is their anger. What you will probably end up with is cool indifference or active opposition to any position you take for the remainder of their tenure in the legislature, which could be 25 years or so. It is not worth the risk.
7. Be willing to cooperate with all groups and look for compromise solutions. A willing attitude can often give surprising results. Be willing and available to testify at legislative committee hearings, public hearings before task forces and study commissions, and before private groups. Be especially available to help other groups with similar interests. Forming these types of coalitions early will benefit your industry many times over when the tough issues arise. It also has the benefit of broadening the base of support for your position.

Excerpt from CMSA's Grassroots Handbook.