

THE CHAPTER DISPATCH

January 2005

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AT A GLANCE – Important Dates

Mark your calendars!

2005

January

Jan 15 **Annual Financial Reports** due to National
Jan 15 **Deadline to file chapter 990 EZ or 990 Form with IRS**

February

Feb 14 **CMOY and ASOE nominations** deadline
Feb 15 Requests for **Complimentary Registrations** deadline

April

Apr 1 **Nomination Deadline for Chapter Presidents' Council (CPC) Rep Position**
Apr 29 **Super Saver Discount** deadline for CMSA Annual Conference Registrations
Apr 30 **Entry Deadline for Chapter Innovation and Excellence Awards**

June

Jun 21–25 **15th Annual Conf**, Orlando, FL

October

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

NATIONAL UPDATES

2005 CMOY & AOSE AWARD NOMINATIONS

*Recognizing that success today takes **LEADERSHIP, DEDICATION, and EXCELLENCE** at every level – the nomination search is on for CMSA’s 2005 National Awards.*

Nomination Postmark Deadline ★ February 14, 2005!

Nominate an exemplary Case Manager for these prestigious awards:

CASE MANAGER OF THE YEAR AWARD (CMOY) - In an effort to celebrate the dedication and leadership of those committed to the CM industry, this distinguished award is given to an individual whose notable contributions and exceptional dedication have provided a positive vision for the future of CM. This award recognizes an individual whose leadership qualities, both professionally and personally, have encouraged others to develop their own gifts of leadership excellence and whose continuing commitment to leadership activities have shaped the industry.

AWARD OF SERVICE EXCELLENCE (AOSE) - This national award is given to a practicing case manager who exemplifies the essence of CM - innovation, creativity, collaboration, and resourcefulness! This award recognizes an “in-the-trenches,” grassroots case manager whose day-to-day CM practice has transformed the field and contributed to the greater good - not only for their clients but also for their community. Through this distinguished honor, CMSA desires to recognize the extraordinary importance one individual can make through outstanding initiative, inspiration to others, and significant contributions to improving the quality of practice.

Details and 2005 National Award Nomination Forms are available at

www.cmsa.org/Professional/Awards or contact

CMOY/AOSE Staff Liaison, Spring Houk, shouk@acminet.com, (501) 225-2229 Ext. 47

2005 Case Management Salary and Case Load Survey

Help us update the ADVANCE/CMSA 2003 Salary Survey by completing this year’s salary and caseload survey. Simply go to www.cmsa.org and click on the Online Survey link inside the 2005 Case Management Salary Survey section of the Home Page!

Survey is active through March 1. Please help promote this survey. This can be taken by both members and non-members. More participants will reflect an average with more accurate results!

Watch for the results in the May/June 2005 issue of ADVANCE.

CMAG Updates – Research Project and Award!

Many of you are aware of the Case Management Adherence Guidelines (CMAG-1) workshops that are being conducted in 35 cities around the U.S. But are you aware of the impact this training has in a research study that is currently being conducted? Once attending a CMAG workshop, you become eligible to participate in this research study

CMSA is providing training to practicing case managers nationwide. With the assistance of Pfizer, Inc., CMSA hopes to train 1,500 case managers nationwide by the end of 2005. Case managers who choose to participate in the research will enroll themselves by signing a consent form at the training seminar or shortly thereafter on the CMAG website. The CM will activate participation by logging in to the CMAGTracker at www.cmsa.org/cmag and entering information about her or his practice and professional characteristics. Only CM's trained during a CMSA CMAG workshop will be allowed to participate in the research.

After activating the CMAGTracker web site, the CM will start entering de-identified patient information. The CM will enroll patients into the study by reviewing the consent form with each eligible patient in their caseload. All patients who consent will have key information entered into the CMAGTracker database. CMSA hopes to have up to 5,000 individual records entered in the CMAGTracker system. Patient data will be coded by the CM so that real patient name and other identifying information is not entered into the database. Case managers enter data for at least four points in time:

1. Preliminary assessment
2. Initial intervention
3. Follow up assessment
4. Discharge assessment

The tools and protocols for conducting the assessments and entering progress data are included on the CMAGTracker web site. All of the data fields are provided in the CMAGTracker web based system; so that participating CMs can easily enter information as they work through the tools with the patient.

Case managers are asked to explain the project and request patient consent for **every second** newly referred patients in their caseload. The CM should not pick and choose patients, as this may introduce research biases into the study. The CM should exclude certain types of patients such as prisoners, for whom it is difficult to ensure true consent. Inclusions and exclusions must be done consistently.

Benefits to CMs for Participating

Case managers who participate will have the benefit of using electronic tools to support assessment, planning, intervention and evaluation of medication adherence strategies. This is expected to be of direct benefit to case management practice, and to improve the outcomes for individual case managers.

In addition, CMSA is offering an award to recognize case managers who participate in the initiative. CMSA is launching the *Award for Excellence in Adherence Management* (AEAM) award in 2005 to recognize the CM who has used CMAGTracker for the greatest impact in his or her patient load. In the Spring of 2005, participants in the research project will have the opportunity to apply for the award directly from the CMSA web site.



NEWS RELEASE

URAC STATE UM SURVEY FINDS SIGNIFICANT REGULATORY INCREASES, LAW CHANGES SINCE 2000 Accreditation Body Releases Survey Results in New Guide

Washington, D.C. (Dec. 16, 2004) – Ninety percent of all states now regulate either health utilization management (UM) entities and/or UM activities by managed care organizations – up 12 percent since 2000, according to the results of a URAC (www.urac.org) survey of state UM laws and regulations.

A leader in promoting health care quality through accreditation and certification programs, URAC completed an extensive survey of UM laws and regulations in all 50 states and the District of Columbia this past summer. Other highlights of this survey show that: 34 states require licensure, registration, certification, or accreditation for health UMOs, or organizations that practice UM (up 13 percent since 2000).

- 39 states have specific clinical review criteria guidelines for UM or managed care entities (up 11 percent since 2000)
- 24 states impose prohibitions on financial incentives for UM reviewers or UM organizations (up 9 percent since 2000)
- 36 states require UM or managed care entities that practice UM to make any clinical review criteria used for adverse determinations available upon a participant's request (up 89 percent since 2000)
- Rights legislation now require some sort of initial appeals process for UM activities (up 25 percent since 2000) and 39 states and the District of Columbia require an external appeal or independent review process, should an individual wish to challenge their UM decision to a neutral third party (up 15 percent since 2000).

“These trends demonstrate that state officials are more heavily regulating UM in order to create a formal and structured setting for its practice,” said Garry Carneal, JD, MA, URAC President and CEO. “The survey findings clearly indicate that states continue to actively supervise how medical necessity review determinations are made to insure that UM decisions are made in a standardized manner based upon a sound medical basis.”

URAC will publish the full state-by-state results of its survey in its *Utilization Management Guide 3rd Edition*, which will be released Jan. 3, 2005. Included with the guide are several insightful articles by a number of leading authorities on various aspects of utilization review and UM. Last updated five years ago, the guide is an up-to-date comprehensive compilation of UM laws, regulations and proposals in all 50 states, the District of Columbia, American Samoa, Guam, Puerto Rico and the U.S. Virgin Islands. In addition, the guide also details the federal regulatory environment for UM, which has changed significantly since the U.S. Department of Labor's claims procedure was implemented in 2002. These regulations are the federal government's first major entry into medical management processes oversight (outside of Medicare and Medicaid).

"This guide is a definitive information source for both new and experienced health care professionals responsible for utilization management," said Charles W. Stellar, URAC Chair and executive vice president of AHIP. "Especially in light of changes to utilization management requirements brought on by new state and federal requirements, including the Medicare Modernization Act [MMA], the guide is an essential tool for all involved in the UM field."

For more information about the survey or *The Utilization Management Guide 3rd Edition*, contact Jackie Lombos at (202) 326-3943. To order the guide, go to www.urac.org. All media inquiries should be directed to Jackie Lombos at jlombos@urac.org.

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URAC, an independent, non-profit organization, is a leader in promoting health care quality through accreditation and certification programs. URAC's standards keep pace with the rapid changes in the health care system, and provide a mark of distinction for health care organizations to demonstrate their commitment to quality and accountability. Through its broad-based governance structure and an inclusive standards development process, URAC ensures that all stakeholders are represented in setting meaningful standards for the health care industry. For more information, visit www.urac.org.

CONFERENCE UPDATES

CMSA's Annual Conference - *Registration Discount Opportunities*

Effective January 1, 2005, CMSA's conference registration is now open!

ONLINE Discount: Register **ONLINE** in **January** and receive an additional **\$100 off your full conference registration!** This is in **addition** to your \$100 membership discount. *Not applicable to one-day passes or pre-conference only registration.*

GROUP Discount: **At least 3 attendees may register together and save \$200 each!** Registrations and payment must be received in the same envelope. This is in **addition** to your \$100 membership discount. This discount *does not apply to online* registrations! (See registration for restrictions).

SUPER SAVER Discount: **For the deepest discounts, register by April 29!**

OTHER Discounts: **Students, Military, and VA attendees have an opportunity for additional savings.** See registration for details.

Visit www.cmsa.org/conference for conference details and information. Brochures will arrive to each member in the Jan/Feb issue of *The Case Manager*. Members may receive up to 3 conference brochure mailings. Encourage them to share their extras with a friend or allow the chapter to disburse to those in need. Chapters will be receiving extra brochures to hand out to non-members at their local events.

Complimentary Conference Registrations Available

This service is available to chapters who need to request a complimentary registration in order for a chapter leader to be able to represent the chapter at the Annual Conference and attend chapter related activities. These available registrations are made possible to the chapters from CMSA's Corporate Members who have donated unused conference registrations. ***There are a limited number of scholarships available.***

Here are some things to keep in mind:

- 1) Talk with the chapter Board to see who might not be able to go, if it wasn't for assistance. In other words - this is not to replace the registrations that may already be budgeted for officers to attend conference. This is for someone who would benefit from coming and needs assistance but neither the chapter, nor their employer is capable of assisting.
- 2) Not more than one conference registration will be awarded to each chapter.
- 3) Those requesting assistance will be given enough notification so that if they are not approved, there will still be time to register at the Super Saver Rates deadline of April 29.
- 4) *There will **not** be any refunds* to someone who is already registered in order to honor them with a complimentary registration.
- 5) The recipient should try to attend the Tuesday afternoon Chapter Workshop. One of the purposes of assisting the chapters is so that they are able to get an officer to the conference and represent the chapter at the workshops and other chapter related activities. The cost for the Tuesday workshop is only \$49 and worth meeting other chapter leaders to share resources and information.
- 6) The Conference Registration will cover Wed - Sat registration fees. This does not cover activities during the pre-conference on Tuesdays, nor travel and boarding expenses.

7) For chapters needing a complimentary registration to help send a member or board member to conference, also consider taking advantage of this year's remarkable group savings! Use the extra savings to send a member or board member that would not have an opportunity otherwise!

Once the chapter decides who they would like to submit for a complimentary conference registration, please send a letter stating the persons name and reasons for not being able to attend without some type of assistance. This can be emailed to mlee@acminet.com by February 15.

CHAPTER REMINDERS

Excellence and Innovation Awards

Start planning now to enter your chapter activities in the areas of Membership, Conference, Educational Programming, Technology or Print Publications!! You may enter more than one category. 2005 Entry Forms are available on the website under Professional Development, then the Awards section or <http://www.cmsa.org/Professional/Awards/CEIA/>.

Here is your chance to shine and show the hard work that your chapter has put into this past year. Start planning now to prepare your entry! Entry deadline is April 30, 2005!! *These must be in the CMSA office by this date.* Here is a list of last year's winners announced at CMSA's Annual Conference in June 2004:

1. **Award of Excellence for Chapter Conference** - *Northern New Jersey Chapter of Case Management Society of America*
2. **Award of Excellence for Membership Development** - *Northern New Jersey Chapter of Case Management Society of America*
3. **Award of Excellence for Best Use of Technology** - *Case Management Society of New England*
4. **Award of Excellence for Chapter Educational Program** - *Houston/Gulf Coast Chapter of the Case Management Society of America*
5. **Award of Excellence in Print** - *The Rio Grande Chapter*

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 during the Chapter Presidents' Council Meeting at this year's annual conference in Orlando, FL. Chapter Presidents not attending the annual conference will have the opportunity to vote by mail or proxy.

Nominations packets will be emailed to all Chapter Presidents by January 21, 2005. 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 April 1, 2005. You may also contact the current CPC Rep, Becky Perez, for more details of this position. Becky can be reached at bperez@carpdc.org.

Officer Update Form

Several officers will be starting new terms January 1, 2005. Please make sure that your chapter has sent in the Officer Update Form to notify CMSA of the changes. This is very important to keep the lines of communication going with reports, newsletters, checks and other correspondence. You may get a copy of the form by emailing Michele Lee at mlee@acminet.com or visiting the website at <http://www.cmsa.org/PDF/Chapters/ChapterOfficerUpdateForm.pdf>. Monthly reports and checks will not be sent to chapters that have expired officers.

Ways the National Office Supports Promotion of Chapters

CMSA Website

In an ongoing effort to support and promote CMSA chapters, the CMSA National website now offers a way to display chapter meeting information and special events. Those interested in finding out more about your chapter, can do so by clicking on the Contact tab at the top of the CMSA Home Page. Here they can discover the following information on CMSA chapters:

- ◆ Primary Contact's name, phone number and email address
- ◆ Chapter Office (*permanent mailing address, phone number and email that does not change during officer transitions*)
- ◆ Chapter Website
- ◆ Local Meeting Information: displays dates, times and locations, etc...for routine events
- ◆ Chapter Conferences: can display details on a conference, special workshops or other one time events

This information needs to be reviewed on a periodic basis by the chapter to ensure the information is accurate. This is almost like having a mini-website! Take advantage and keep your information updated. The data is now database driven and can be updated within minutes of contacting CMSA National.

The Case Report – CMSA's Member Newsletter

CMSA promotes the chapters in our member newsletter in the section entitled Chapter Calender of Events and Contacts. This section highlights each chapter's general meeting information, contact information, and website listings. There is limited space but enough is printed to allow a reader to see there is a chapter in their area and how they can find out more about the activities of the group.

The Chapter Dispatch

This publication is geared directly for the local leaders but is posted in an archive on our website accessible by anyone. Prospect members can read about the past activities of the chapters to see how much fun they have and the level of activity that the group is involved with their members and the community. This publication is not meant to be a calendar of upcoming events but a snapshot of the history and activity of the chapter.

National Campaigns

CMSA does various campaigns to both lapsed members and potential members. The lapsed campaigns are geared toward members who expired at least 3-4 months ago. Our potential member campaigns will target groups involved in case management, such as the CCM mailing list or the list of another organization. In addition, we promote our membership benefits to the non-members who attend our annual conferences. In these campaigns, not only do we promote the National benefits of joining but also the local involvement. This information is promoted through our professionally designed recruitment brochure called the *Why You Should Join* brochure.

CHAPTER HIGHLIGHTS

Official CMSA Chapters

Denver, CO

The Rocky Mountain Chapter of CMSA is sponsoring a scholarship this year. The deserving person will be an individual who is currently employed in the case management field striving to advance or obtain a higher degree. The scholarship is in the amount of \$1000 and will be awarded in August 2005 and presented at their Annual Case Management Conference in October. The Colorado Springs extension has officially begun and will host its first meeting in January. The chapter leaders in that area are doing a great job.

Atlanta, GA

The Case Management Society of Georgia – Atlanta Chapter looks back at the year of 2004 as a year filled with great accomplishments. The chapter worked hard to complete noteworthy activities such as:

- Recognition at CMSA National Conference for membership growth of 20 new members.
- Enhancement of Board Orientation with development of a detailed orientation binder for all new members.
- Development and posting of Education Program calendar for the entire 2004 year.
- Successful annual conference that doubled the 2003 conference attendance.
- Established Chapter's CMOY nomination process and selected Chapter's first CMOY, Mary Hoyt.
- Improved meeting communication by sending both mail and fax reminders.
- Established a Special Projects Committee to coordinate member recognition strategies.

Honolulu, HI

As we begin a new year, the CMSA Hawaii Chapter reflects on what 2004 has brought to the local membership. In this past year the CMSA Hawaii Board committed to bringing to its' members educational offerings that often requires travel to the mainland. Rather than traveling to the mainland for CE opportunities, CMSA Hawaii brought exciting national based educational offerings to the island state.

In the spring, the chapter hosted the nationally acclaimed "The Essence of Case Management Course" through PRIME (Professional Resources In Management Education, Inc.). This event brought over 100 case managers across the island state to this most valuable and worthwhile program. It was an opportunity to bring dynamic speakers and industry leaders: Anne Llewellyn and Kathleen Moreo. The program was well received by many of the members. Many shared that the course and the textbook were very valuable, especially for those preparing for their CCM exams.

During summer, the chapter offered a program on "URAC Case Management Standards" presented by Christine Leyden, a national URAC reviewer. This program brought members and stakeholders/purchasers of case management to this event. It was an opportunity to educate members and stakeholders on national based case management standards, the impact of standards on the delivery of case management as well as the value it brings to consumers of case management.

The fall event brought Dr. Bruce Berger, another national expert and dynamic speaker at CMSA National Conferences to the islands. The program *Assessing and Intervening for Meaningful Behavior Change: Helping Patients Better Manage Their Illness* was a half day event held during National Case Management Week.

CMSA Hawaii Board focused on their mission to provide dynamic and exciting programs for the membership in 2004 and succeeded. As an island state in the middle of the Pacific Ocean, it can be difficult for members to travel and have access to such valuable programs. CMSA Hawaii brought the programs to its' members in 2004 and considers it a valuable investment in the professional development of their members.

The chapter looks forward to an exciting 2005, with a new board and plans to "Share the Value of Case Management" in the beautiful island state! The group will keep all updated on events throughout 2005! Aloha and as they say in the islands "Hauole Maka Hiki Hou" Happy New Year!

Chicago, IL

The Illinois Case Management Network takes time off in December and January for holidays and weather issues. The board uses this time to focus on the final plans of this year's Annual Conference *Case Managers Solve the Puzzle* which will be held April 19 at the Drury Lane in Oakbrook, IL. CMAG-1 training was held on January 13 in Oakbrook. The chapter has been very supportive in the promotion of this event. Those in attendance were glad they came, despite winter weather issues. The board continues to work on planning for a CCM course with Sandra Lowery, March 11-12. In addition, a chapter web site is under development. The chapter is keeping very busy!

Fort Wayne, IN

On December 6, 2004 the Fort Wayne Chapter of CMSA had their annual Holiday Gifts and Gathering to support the Chapter's charity of choice. Nancy O'Brien with ASK Ministry Clinic was present to provide the chapter with an update on the number and scope of services being provided. The clinic services many uninsured community members in Fort Wayne and the surrounding area. The chapter collected a record amount of \$650.00! Nancy said the money will go to the cost of medicines. ASK Ministry Clinic is a growing clinic that provides services free of charge to all who enter its doors.

Rick and Dorian Maples, chapter president, delivered the in-kind donations of copy paper, paper towels, and medical supplies to the clinic. The clinic staff was very appreciative.

The nurse case managers that attended that evening donated more medical supplies because they sorted through medical supply cabinets in the offices. Giving is contagious.

Nancy and Dorian have already discussed next year's CMSA *Holiday Gifts and Gathering*. She is willing to come back and bring a core group of volunteers. More contagious giving can be anticipated.

Jackson, MS

The Mid Mississippi Chapter of CMSA held a holiday party in December. The group collected canned goods for a local stew pot kitchen and also made a donation of \$1,500 to The American Red Cross. A Representative from the Red Cross attended the dinner and made a presentation. She was overwhelmed at the generosity of our members. The board decided on this organization due to the number of hurricanes this past year. The American Red Cross is always very helpful after such disasters. Being from the South and close to the coast, locals know the damage that hurricanes can leave behind. Attendees of this holiday party also enjoyed cocktails and dinner provided by sponsor, Orthofix, Inc. Speaker Rosemary Gammon spoke on *Ambulatory Spinal Unloading*. She provided a demonstration of a new back brace that offers a lot of support to the back. The chapter recognized new members and gave away many door prizes to the attendees.

Charlotte, NC

The Charlotte Chapter has completed one year as a new CMSA chapter and have grown to 68 members! The board is steadily planning for an educational conference to be held September 15-16 at the Charlotte Hilton. Additional details regarding the conference will be coming soon. The board appreciates the assistance given to them during their first year from National and surrounding chapters.

Raleigh, NC

The Down East Extension of the Raleigh/Triangle Chapter has continued to meet every other month but have changed their permanent site to New Bern, North Carolina. The group has recognized this is a central location for all active members. The board is discussing and experimenting with new ideas to draw interest at the meetings. They have held open forums on “challenging” patients, given mystery gifts, developed themes for each meeting, sharing of personal job information, and allowed longer networking time prior to start of the business session. This year’s goals include a continued attempt to draw new members and plans to launch a “member campaign” drive. More information on strategies to be shared in the coming months.

Woodbridge, NJ

On behalf of the board and membership of the NJCMSA chapter, best wishes to all for a Happy and Healthy New Year! Now that the holidays are behind us, the chapter is in full swing and preparations are underway for many exciting programs for 2005, including the annual conference. Three great speakers have been secured for the annual program in April (title TBA). These speakers are Major Melanie Prince, recipient of the 2004 Case Manager of the Year Award, who will be speaking on Military Case Management as well as *How to Facilitate Soldiers Back Into the Community*; Dr. James Cope of CMS, who will speak on *Medicare Changes* and Mindy Owen who will speak on *Heart Failure and Hypertension*. Currently, the chapter is at 319 members. The membership is also looking forward to the CMAG Workshop scheduled for April 13 in Woodbridge. Thank you to CMSA for this opportunity.

Dallas, TX

The Dallas Fort Worth Chapter of the CMSA had a great December Holiday Party where approximately 150 pounds of food were collected and provided to a local food bank. There was also great entertainment, provided by the Brothers Three and a wonderful buffet. The chapter will be resuming the monthly dinner meetings, held on the third Tuesday of the month. Of note, there is a change in the schedule for the annual spring conference, which is now going to be held April 21 - 23, 2005 at the Omni Mandalay Hotel, in Irving, TX. Save that date!

Richmond, VA

The Central Virginia Chapter, in celebration of Case Management Week, held an educational seminar titled *Serving the Aging Population* on October 13, 2004. With the increase in age of our population, it was felt that this type of program would be appropriate since more case managers are being used to serve the elderly.

The subjects which were presented included: Disease Prevention in the Geriatric Population: Its Prevention and Treatment, Serving the Sandwich Generation, Physical Activity in the Aging, Client Services in Virginia for the Aging Population, Elderly Law: Legal Matters that Concern the Elderly and The Process and Advantages of Hiring Senior Citizens. The operation of retirement and nursing homes was also discussed by representatives from different local institutions.

The speakers were excellent, and included: Peter A. Bolling M.D., Section Chief for the Geriatrics Department at the Medical College of Virginia, Betty Overby, the past President of the Central Virginia Chapter of CMSA, who is currently a case manager, Ellen Nau, who is a Human Services Program

Coordinator for the Virginia Department of the Aging, Paula Peadan, Esq., who began her career as an intensive care unit nurse at the Medical College of Virginia after receiving her bachelor of science and nursing degree from Mt. St. Mary's College. She then received a law degree from George Mason University and specializes in elder law. And, Dr. Robert S. Kelley, Vice President of Operations for Ukrops Supermarkets Inc., who spoke on the advantages of hiring senior citizens, as well as the disadvantages.

The speakers were excellent, attendance was average, and they hope to increase their attendance for next year's event in October and other events throughout the year.

Gray Broughton, Chapter President, contacted several members of other related organizations, such as The Virginia Association of Rehabilitation Nurses, The Virginia Association of Rehabilitation Professionals, American Association of Legal Nurse Consultants, and the Lifecare Planners Network. Several representatives from these organizations recently met on November 10, 2004, and are in the process of forming a Joint Educational Task Force so that future events can be better coordinated and attended. There has been some problem in the past with different organizations having seminars on the same day or week, and sometimes on the same subject. This task force will attempt to coordinate efforts in order to offer members more professional seminars that will be better attended. There will be a variety of different educational opportunities presented in the coming year.

LEADERSHIP RESOURCES

Food for Thought... by Cynthia D'Amour

As we transition from 2004 to 2005, it's a great time for you and your board to take some time out to review how you are doing as a leadership team. Ideally, I would encourage you to get together for a two or three hour block of time, to eat some good food, to bond as a team -- and to answer the questions below.

If you don't have time to get together in person, you might want to send the questions out via e-mail and have people share their responses on a conference call or via e-mail.

Whether you do this as a leadership team or not, I challenge you as a leader to take the time to reflect on the ten questions below. The answers may please you, surprise you -- and help you identify where to get the biggest return for your efforts in the year ahead.

First, let's take a look at 2004 in review...

What are you proud of?

What is working well so far this year?

What are the three biggest lessons you've learned in the past year?

How is the momentum in your chapter?

If your momentum is not strong, what can you do to pick up the enthusiasm for your chapter?

Who are at least three people who need to be thanked for all they have done to make the past year a bigger success for you? Call them, send a card or shoot an e-mail of thanks in the next few weeks.

Now, let's take a look to the year ahead. With 2005 in mind...

If your year in leadership ended today, would your legacy for the year be in place? How would people talk about it?

If you don't know what your legacy is going to be, you need to identify it immediately. Working towards a legacy will help you to feel extra good about the dedication you are giving to your chapter this year!

Who are the three or four up and coming leaders in your chapter? Who is actively coaching them and selling them on the benefits of stepping up to leadership?

As you move into the new year, what projects, people, or processes need to be steered back to course? How will you do it? Who will do it?

The start of a new year is a time when many people look for something new to add to their life. How will your chapter be ready to take advantage of this powerful recruitment window of opportunity?

How are you preparing to transition your leadership team in the next few months so all chapter functions maintain and grow their momentum?

It's easy to be caught up in the drama of doing chapter business. How will you and your chapter leaders make time to take a good look at what's going on so you can be more strategic as you move into 2005?

Do your words match your actions? By Cynthia D'Amour

Working with associations, I often find leaders with the best intentions who have launched initiatives to grow membership or involvement that failed miserably -- in spite of valiant effort.

What was the problem?

The actions or culture of the chapter did not match the initiative. For example, let's say your board is really excited about growing this year and sets a really bold goal... Your chapter is going to grow by 25% in the next six months. You carefully plan your recruitment events -- and even get the PR team involved in making it happen.

At your first recruitment event, a ton of potential new members show up. You pitch joining strongly -- and are convinced all will join. Your leadership team, thrilled to have accomplished your goal so easily, does a pre-celebration dance in the hotel lounge. Life is good!

As a follow up, you send all attendees a copy of your latest newsletter -- and a personal invitation to attend your next meeting. Only two people show up to join the following month.

What happened?

I beamed in to interview your potential members who did not join and here are some of their comments...

- ◆ "When I talked to the members at the recruitment event, many shared how great the chapter was and why I should join. No one asked me why I personally was there. I got the feeling they were just looking for numbers."
- ◆ "When I looked at some of the displays, the same people were in all the photos. There were a lot more members in the room, so I figured it must be a pretty cliquy group."
- ◆ "I told one leader how I wanted to get involved -- and they told me they would be in touch. It's been three weeks and no call. Obviously, they didn't really want me involved."
- ◆ "I took the information to my boss to see if she would pay for my involvement in the chapter. When I didn't have a list of upcoming events, she couldn't see the value. I couldn't sell her on just trusting that the chapter would have relevant programs for me to attend."
- ◆ "Everything seemed pretty rigid. If I couldn't make the chapter meeting, there was little for me to do. I was hoping for more flexible involvement. Guess they just want people who fit the formula -- rather than include all professionals who might have different time needs."
- ◆ "When I read the newsletter, I didn't see opportunities for me to really do anything. Everything seemed really tradition bound. 'Once again, so and so will do this,' or 'It's time for our annual whatever.' If I'm going to get involved, I want to be able to do something meaningful -- not just be a rote worker bee."
- ◆ "I wanted to join. In fact, I had a check in my pocket. My friend was asked to join by the person talking to her -- but no one personally asked me. I got the invitation to the next meeting; however, I don't feel like being an afterthought. I know they really don't care if I join -- they just want my money."

In each of these examples, the actions of the chapter showcase a closed community.

Some of the examples may be a little extreme to show a point; however, having recruited more than 250 members personally, I have heard a ton of stories that parrot these complaints when asking potential members why they didn't join sooner.

In each example, there is little visual demonstration of the chapter being open to new members -- and the ideas they bring with them.

When potential members or volunteers preview an experience they are looking for proof -- beyond your words -- they they are making a wise investment of their time.

Take some time and do a audit to discover the what your chapter culture really says.

Review your newsletters and communication strategies.

Are they inviting? Do you encourage new people to get involved? Do you have contact information in case people have questions? How about a map to the next meeting?

Take a look at chapter events with fresh eyes.

Who welcomes the lone person at the door? Are people trained to help newbies find a home in your chapter? How do you support participants in meeting each other?

If you want a real eye-opener, have someone secret shop your chapter as a potential member.

Have them share their experience. How long did it take to return an inquiry? How were they welcomed? How were they sold on the value of membership?

You may be surprised at what you see when you examine your chapter and its culture with a fresh pair of eyes.

What does your chapter culture and actions shout to potential members and volunteers?

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COMMUNICATION RESOURCES

A Beginner's Guide to Effective Email, Revision 2.0 -- [Kaitlin Duck Sherwood](#)

I believe strongly in the value of electronic mail in both corporate and personal domains. Email is cheaper and faster than a letter, less intrusive than a phone call, less hassle than a FAX. Using email, differences in location and time zone are less of an obstacle to communication. There is also evidence that email leads to a more egalitarian information structure. Because of these advantages, email use is exploding. Sadly, in the twenty-plus years that I have been using email, I have seen a large number of people suffer mishaps because they did not understand how to adjust their communication styles to this new medium. I wrote this document to try to help people avoid those problems.

This is *not* a document on the mechanics of sending email - which buttons to push or how to attach a photograph. Those details are different for every different email software package, and are better handled by manuals for the program. I instead focus on the *content* of an email message: how to say what you need to say. I don't think of this as email etiquette (commonly called *netiquette*) because I don't think these guidelines merely show you how to be a nice person. These guidelines show you how to be more efficient, clear, and effective. This is *not* dogma. There will be people who disagree with me on specific points. But, if there was only one right answer, there wouldn't be a need to write this guide. Hopefully, this guide will make you examine your assumptions about email and thus help you maximize your email effectiveness. Then you can write to reflect your own personality and choice.

What Makes Email Different?

Electronic communication, because of its speed and broadcasting ability, is fundamentally different from paper-based communication. Because the turnaround time can be so fast, email is more conversational than traditional paper-based media.

In a paper document, it is absolutely essential to make everything completely clear and unambiguous because your audience may not have a chance to ask for clarification. With email documents, your recipient can ask questions immediately. Email thus tends, like conversational speech, to be sloppier than communications on paper.

This is not always bad. It makes little sense to slave over a message for hours, making sure that your spelling is faultless, your words eloquent, and your grammar beyond reproach, if the point of the message is to tell your co-worker that you are ready to go to lunch.

However, your correspondent also won't have normal status cues such as dress, diction, or dialect, so may make assumptions based on your name, address, and - above all - facility with language. You need to be aware of when you can be sloppy and when you have to be meticulous. Email also does not convey emotions nearly as well as face-to-face or even telephone conversations. It lacks vocal inflection, gestures, and a shared environment. Your correspondent may have difficulty telling if you are serious or kidding, happy or sad, frustrated or euphoric. Sarcasm is *particularly* dangerous to use in email.

Another difference between email and older media is that what the sender sees when composing a message might not look like what the reader sees. Your vocal cords make sound waves that are perceived basically the same by both your ears as your audience's. The paper that you write your love note on is the same paper that the object of your affection sees. But with email, the software and hardware that you use for composing, sending, storing, downloading, and reading may be completely different from what your correspondent uses. Your message's visual qualities may be quite different by the time it gets to someone else's screen.

Thus your email compositions should be different from both your paper compositions and your speech. I wrote this document to show you how to tailor your message to this new medium. Click below to go to the various sections of this email guide:

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