

# THE CHAPTER DISPATCH

November 2005

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## National Office Contact Information:

8201 Cantrell Road, Ste 230

Little Rock, AR 72227

phone: (501) 225-2229; fax: (501) 221-9068

website: [www.cmsa.org](http://www.cmsa.org); email: [cmsa@cmsa.org](mailto:cmsa@cmsa.org)

## Membership/Chapter Services Contacts:

Michele Lee, ext 20, [mlee@acminet.com](mailto:mlee@acminet.com)

Danielle Marshall, ext 19, [dmarshall@acminet.com](mailto:dmarshall@acminet.com)

Claudia Collins, ext 10, [ccollins@acminet.com](mailto:ccollins@acminet.com)

## AT A GLANCE – Important Dates

*Mark your calendars!*

### 2005

#### November

Nov 16 CMAG Advance in Boston, MA

### 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 20 National Board Election Closes

## NATIONAL UPDATES

### 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](http://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](mailto:shouk@acminet.com) or (501) 225-2229 ext. 47

### Case Manager Receives National CMAG Award

The inaugural *CMSA Award for Excellence in Adherence Management (AEAM)* was presented at Orlando '05 to **Jerri Lee Post, RN, BSN**, of Hope, Ark.

This new national award is presented to an individual case manager who demonstrates excellence in applying CMSA's Case Management Adherence Guidelines (CMAG) and use of the online CMAGTracker tool. The award (available only to CMSA members who have attended a CMAG training workshop) included a \$1500 cash award and a plaque.

The award is supported through an unrestricted educational grant from Pfizer. A CMSA advisory committee selects applicants for the award who complete the following:

1. Registers to use the online CMAGTracker system.
2. Enters assessment data from at least one patient into the CMAGTracker system and completes a full patient assessment.
3. Submits an essay describing the applicant's activities to improve patient adherence to prescribed medications using skills or strategies learned in a CMSA CMAG workshop.

For information about CMAG, go to [www.cmsa.org/cmag/](http://www.cmsa.org/cmag/).

**REGISTER TODAY FOR CMAG ADVANCED TRAINING!**

Go to [www.cmsa.org/cmag/Advanced.aspx](http://www.cmsa.org/cmag/Advanced.aspx) for details.

## CHAPTER REMINDERS

### 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](mailto: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](mailto: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/](http://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,

On November 4<sup>th</sup> and 5<sup>th</sup>, I had the distinct pleasure of attending the CMSA Board of Directors meeting. We met at the CMSA National Office in Little Rock, AR. Though our schedule was jammed packed, it was never rushed. It is important to know that your Board of Directors gives due consideration and discussion to each agenda item. I'd like to share a few discussion points with you, to give you a flavor of things to come...



### **Health Policy Proposal**

The Legislative Council is a very exciting initiative. A committee report was presented by Peggy Leonard, Council Chair. The plans for this coming year include a review and update of the Grassroots Handbook, research and development of both educational programming and tools for members, ensuring the tools offered meet member needs, and possibly adding more resources based on member feedback. Get ready for an informative and energizing presentation at the 2006 Chapter Leadership Workshop!

### **Case Manager of the Year (CMOY) and the Award of Service Excellence (AOSE)**

As chapter leaders, we must lead the charge of identifying potential nominees for these awards. We, as an organization, strive to elevate awareness of the strategic importance and value of case management to the healthcare continuum. Touting the accomplishments of our best case managers is an essential platform that helps to spread the word. You will begin to see announcements about these awards in the coming months. I challenge each chapter to submit a nomination for each of these awards. Start working on that now. The submission deadline of February 14<sup>th</sup> may sound far away, but as we all know – time flies by very quickly so get working on this challenge today!

### **The Importance of Medication Adherence – CMAG-I and Beyond**

Case managers are recognized resources for working with clients to improve their health status through adhering to prescribed medication programs. CMSA is spreading the word beyond the member-only CMAG-I sessions and the three CMAG Advanced sessions are just the beginning of the fantastic developments. Get ready for some groundbreaking news as CMSA positions the case manager front and center as an essential member of the patient care team.

### **2006 National Conference**

If you have not already blocked out the dates for our upcoming national conference, do it now! The 16<sup>th</sup> Annual Conference and Expo will be held at the Gaylord Texan Resort and Conf Ctr on Lake Grapevine, June 13–17, 2006. The CMI and CMSA Conference Committee are working so hard on bringing this event together and the planned schedule promises to be a tremendous opportunity for learning and networking. Watch for the conference brochure in January or visit [www.cmsa.org/conference](http://www.cmsa.org/conference) for more details about online & other registration discounts.

### **The Population Health Institute (PHI)**

The PHI is a non-profit organization founded in 2004 to allow for credible, transparent, and replicable impact evaluations of defined population health programs (e.g., wellness, health promotion, case management). The Board of Directors discussed the specific goals of PHI and recognizes the importance of using scientifically credible methods to evaluate the impact of case management. I recommend you take a look at the PHI website, [www.PHIInstitute.org](http://www.PHIInstitute.org) for additional details.

### **Multi-state Nursing Licensure in Case Management**

CMSA is frequently queried as to how best to approach licensure requirements when practicing case management outside your state of licensure. Components of case management are recognized as falling within the nursing practice realm, therefore working for an organization with members / clients residing in different states poses a definite risk. The National Council of State Boards of Nursing in 20 states have into compact which recognizes nursing licensure from other states. Recognition is based on the nurse's state of residence, not the state in which s/he practices. CMSA strongly urges every member to aggressively encourage the non-Compact State Boards of Registration to join the Compact or to encourage federal legislation mandating the recognition of nurse licensure across state lines. For more details about the Compact, visit [www.ncsbn.org](http://www.ncsbn.org).

This is just a taste of the topics addressed at the Board of Directors meeting. There is much more information, I can't even begin to outline in this limited format. Just be prepared – you'll be hearing a lot in the coming weeks and months so fasten your seatbelts!

Warm regards,

Teri Treiger  
Your 2005-06 CPC Rep

## CHAPTER HIGHLIGHTS

To contact any of the local affiliate or pending chapters, visit [www.cmsa.org](http://www.cmsa.org) under the Contact tab.

### Official CMSA Chapters

#### **WELCOME!!!**

CMSA welcomes two new chapters to the CMSA chapter network and family! On November 16, the Case Management Society of America ArkLaTex Chapter in Shreveport, LA and the Southern Ohio Valley CMSA Chapter in Cincinnati, OH officially became incorporated into the CMSA network. Congratulations! Both groups have worked very hard over the last few months to make their vision a reality. Take a moment to welcome them. For Shreveport, contact May McAnally at (903) 927-6309 or [may.mcanally@mrmc.net](mailto:may.mcanally@mrmc.net). And, in Cincinnati, contact Mary Beth Newman at (513) 336-5457 or [mary.beth.newman@anthem.com](mailto:mary.beth.newman@anthem.com).

#### **Jacksonville, FL**

In an effort to reach case managers in different settings, the Northeast Florida Chapter has been having educational sponsored luncheons & dinners in various restaurants every other month between from September through May. These are generally attended by approximately 45-50 case managers per meeting with some special topic as an educational offering at the same time. The proceeds from one of these meetings were donated to the family of one of the local case manager's whose family was devastated by Hurricane Katrina. In addition food, clothing, and other essentials were delivered to the small community.

The chapter recently had election of new officers and the "passing of the gavel". Dianne Miller, immediate past President and her loyal Board of Directors are to be commended for their persistence and devotedness in keeping the chapter active and available to the local community.

October 13th the Northeast Florida Chapter of CMSA had its annual Vendor Fair at Dave and Buster's Restaurant Fun Center with the biggest turnout to date. It was attended by nearly 200 local case managers with plenty of networking, community resource education, and a good time for all. Their many sponsors and vendors help to keep case managers apprised of the latest resources and approaches that can be utilized in the myriad world of case management.

Frequently, the CMSA Chapter is notified of various job offerings with the request to pass these on to the membership which is done during meetings and through email notification. This is a valuable resource and demonstrates value in a frequently volatile work environment.

#### **Atlanta, GA**

Case Management Society of Georgia - Atlanta realized a growth of interest in membership as a result of their recent successful annual conference. While there were some negative comments about the conference "room too hot, room too cold, room too small, room too big", they recovered overwhelming positive feedback from attendees. At the post-conference committee / board meeting, they decided to move forward with plans to begin Case Management Week 2006 with another conference. The bimonthly general meeting in November hosted a topic of *New Advances in the Technology and Care of the Acute Stroke Patient*, presented by Emory University Neurosurgery team. The chapter is fortunate to have this cutting edge technology in their back door. Holiday greetings will be sent to all current members along with an invitation to increase members' active involvement. To that end also, they are implementing a change in the meeting format to allow each committee chairperson to present very brief formal goals and reports at each meeting. That way, the membership can put a name and face together and foster increased involvement.

## **Augusta, GA**

The Augusta CMSA chapter is getting back on track and has worked hard to get it there. In November, they hosted a presentation by a local pulmonary physician on DVT and PE at one of the better restaurants in town, sponsored by a pharmacy company. The chapter also held elections at this meeting. Their goal is to be more organized and offer more to the local case managers.

## **Chicago, IL**

During CMSA Chicago's October educational meeting, the chapter received a lot of positive feedback. Their level of interest and number of attendees have been increasing due to the most recent educational programs. Most of them felt "CMSA Chicago is like family" and not like other case management organizations. The October speaker, Mary Sue Reining, spoke on *Soar to New Heights*. Her evaluations included comments such as: *What an inspiring & motivational speaker! Thank you for your encouraging words! Made you think out of the box. For "me" instead of the "job". Organized, handouts concise. Relevant to professional growth & leadership. Increases self awareness. Very motivational. Very inspirational & thought provoking. Learning opening eyes.*

In terms of new resources, the chapter is looking for a good CCM Certification Course to make available to their chapter members.

## **Indianapolis, IN**

The Central Indiana Chapter saw their 11<sup>th</sup> Annual Conference on October 12, 2005, *Indiana's Health Care Challenges and Solutions... Where Do We Go From Here?* as a great success. This was the first year to have the conference at Indiana University Purdue University Indianapolis (IUPUI). The Conference Center is in the midst of Indiana University School of Medicine and Methodist Hospital (Clarian Health Partners). The chapter had 150 in attendance and 56 exhibitors. They were very pleased to have Dr. Judith Monroe, Indiana State Health Commissioner as the keynote speaker—*Healthcare Challenges/Solutions*. Her information was timely both from a personal as well as professional standpoint. Other topics covered included *Current Trends Impacting Case Management, The Future With Diabetes, Patient To Person—Coping With Chronic Pain* and *Case Management For Non English Speaking Clients*.

As the conference falls within Case Management Week, they also celebrated by paying special tribute to all Case Managers. Each attendee received an address book and calendar as a reminder of their positive impact on healthcare and to commemorate Case Management Week. These items will also be distributed at the monthly Chapter meetings and Holiday Gathering in December.

## **New England (MA, ME, NH, RI)**

With a new board installed at Case Management Society of New England (CMSNE)'s September Annual Conference, incoming President Dolores Burke started her term with an overnight board retreat. This retreat included an Executive Board planning meeting and an educational session. At the board meeting goals were developed for the coming year, these goals included an ongoing commitment to develop legislative health policy education for the membership, a movement to a more polished and professional look for the chapter, an outreach to the Social Work community to work more collaboratively providing educational opportunities, on going pursuit of social responsibility initiatives and continued development of quality educational and networking opportunities for members across the New England region. The educational breakfast program, *The 7 Keys: A Fairy Tale for Today's Woman*, presented by Donna Johnson, RN, CPCC, a professional coach, provided the current board members and committee members from the past year the understanding to apply the components of a Russian fairy tale to their own personal strengths and obstacles in order to develop a strategy for reaching ones goals. The board retreat and educational forum has become an excellent opportunity for board members to meet in a relaxing environment, brainstorm and work on chapter goals and get to know each other, in addition the educational session provides the benefit of contact hours, the ability to recognize members who volunteered on past CMSNE committees and also the added opportunity to further encourage and mentor past volunteers.

Educational programming to include Legislative Policy, specialty Hospital Based Case Management, End of Life/Palliative Care, Community-based Case Management are being considered for the upcoming year.

CMSNE is currently working on details for the 7<sup>th</sup> Annual Leadership Conference which will be held March 15<sup>th</sup> in Bedford, MA. Members Alice Muh and Kathy Calandra will be co-chairing this event. Local popular motivational speaker, Jack Agati, will speak to the issue of “social management” in his own unique way. Additional speakers are currently being finalized. Watch for upcoming information at [www.cmsne.org](http://www.cmsne.org).

### **Raleigh/New Bern, NC**

The Triangle CMSA Chapter met on November 2, for the first quarterly meeting. They recently changed from monthly to quarterly meetings. It was a success. They voted to donate \$2,500 for a Christmas donation to the American Red Cross. They have started planning the 2006 conference, for August 10-11. The theme title is going to be *Flip Flops, Flamingo's and Fun-Healthcare in Paradise*. They are going to have a variety of speakers ranging from Barb Bancroft & Patricia Bomba to a local surgeon who was a hit at the last conference and there was a lot of request to get him back to talk about obesity and diet issues. The next Triangle CMSA breakfast meeting will be held February 1 at Wake Med of Cary. There will be 2 hours credit for CCM's. The chapter is also hosting a drawing for a free membership at every quarterly meeting.

### **Woodbridge, NJ**

The New Jersey Chapter met on October 19 to celebrate Case Management Week. They had 175 pre-registered in attendance with 8 exhibitors for the evening dinner program. Each chapter member was presented with a Case Manager Recognition Pin and all attendees were given a copy of Acting Governor Cody's Proclamation to Case Managers. They raffled off Puzzle Shirts and one of the new chapter denim apparel. In recognition of October as Breast Cancer Awareness, they also raffled off prizes for that in addition to other door prizes from the chapter and the exhibitors. There was an interactive panel discussion for 2 credits, *How Case Managers Can Optimize Outcomes in CHF*. The uniqueness of this program was that it was a “learn from within”. Every panelist was a member of the chapter. This was an opportunity to reach within the chapter for speakers/leaders and it was overwhelmingly received by such comments as, “I never knew we had such talented people right here”; “What an opportunity to discuss the topic of CHF across so many levels of care”. They are looking forward to Connie Commander, President-Elect CMSA coming to the chapter in November to talk about Medicare D and CMSA President, Susan Rogers coming to talk on Osteo (sponsored by Roche) at the Holiday celebration in December. They feel very fortunate to have this opportunity to bring CMSA National closer to home. With thanks to the Board, the membership and the exhibitors, this Chapter now has grown to a record high of **405 members!**

### **Albuquerque, NM**

The Rio Grande Chapter of CMSA recently held their annual conference, *Rio Grande CMSA: Hot Stuff in Case Management*. This year, they branched out and had a pre-conference session of the CCM Preparation Course, as well as their standard 2 day annual conference. All three days were a great success. They recorded 25 attendees for the CCM Prep Course and over 70 attendees on each day for the 2 day conference. Forty-two community partners participated in the conference and they offered many gifts that were raffled among the attendees. The conference brought attendees from New Mexico, Arizona and Idaho. The out-of-staters stayed for the International Balloon Fiesta.

The conference took place close to Case Management Week. Again this year, the Governor proclaimed Case Management Week in New Mexico to coincide with the National Case Management Week. The proclamation was displayed at the seminar along with a big poster that indicates the theme and the organizations that support this week. In recognition of Case Management Week, the Rio Grande Chapter and community partners hosted a "celebration hour" to promote Case Management Week. ALL community case managers were invited to join them, even if they have not been able to attend the conference.

They also decided to market Case Management Week to healthcare organizations and community partners around the state. The goal has been to increase the support of case managers they work with or that are in their organizations and attempt to provide more awareness in New Mexico for their group of professionals.

### **Hudson Valley, NY**

The Hudson Valley Chapter promised to present a variety of interesting topics this year to promote both personal and professional development. The title *Feng Shui for the Case Manager* drew a record crowd at the November meeting. Margie Chu, past president of the Long Island Chapter, instructed an enthusiastic group about the basic concepts of Feng Shui and how this ancient Chinese practice applies to the case management process. It was an interactive session with great discussion and questions about how to obtain balance and harmony in life with good Chi and Feng Shui.

As promised, the venture to the "North" is becoming a reality on December 1 in Albany, New York. The Hudson Valley Chapter is fortunate to have the well known Catherine Mullahy present a session titled, *Emerging Issues for the Care Management of the Transplant Patient*. The chapter is encouraging attendees to bring their "Case Manager's Handbook" for an autograph and more handbooks will be available that night for purchase. A wonderful dinner will be sponsored by Roche Laboratories. The chapter is hoping to meet new friends and colleagues in the Capitol District and share with them the benefits of membership in CMSA.

### **Long Island, NY**

The Long Island Chapter held their yearly conference on Oct 26, 2005 at the Westbury Manor. They held the conference from 4pm - 9pm & the response was overwhelming. The topics were: *Ethical Dilemmas: Balancing Healthcare Needs with Financial Constraints* with Dr. John Banja. The second speaker, Lauren Jenkins, spoke on *Balancing the Stressors of Effective Case Management*. There were approximately 150 attendees including vendors. The response was overwhelming with very positive responses. Everyone who attended loved the idea of an evening conference where they were able to have more CM's attend.

### **New York, NY**

CMSA-NYC decided to truly celebrate Case Management Week. The chapter meeting was a skyline cruise down the Hudson River past the Statue of Liberty. The speaker was outstanding and the members earned 3 CE's while cruising and enjoying a lovely buffet dinner. Afterwards, there was dancing to a great DJ with numerous prizes distributed. Senator Hilary Clinton dispatched a representative to read the NY State Proclamation and NY City Mayor Michael Bloomberg's proclamation was read, as well. The cruise was the first deviation from their usual meeting site at the Marriott Marquis Hotel, in midtown NY City. The board made a decision to use an alternate site to give heightened interest to the special occasion. The cruise was so successful that they have decided to make it an annual event. The weather prediction was for chilly, fowl weather on the day of the cruise so future cruises will be held in September when the weather is better. The membership is transient, meaning many case managers live outside NY City and travel to/from the city for work via public transportation. So, it is very important that meetings are near easy access to public transportation and the meetings must be run efficiently and timely so that attendees can leave while the public transportation is still running. So, the chapter has to take all these concerns into consideration in their planning process.

At the next chapter meeting, the subject is *Everything You Always Wanted to Know About Medicaid*. This will be the holiday celebration and it is being held in lower Manhattan. In light of the subject matter, they decided to have the meeting where several health plans are located, to make it more convenient for their case managers to attend. This is part of the membership outreach initiative. The chapter is looking forward to great turnout for this meeting.

## **Cincinnati, OH**

The newly established Southern Ohio Valley (SOV) Chapter is growing quickly! CMSA membership in the Cincinnati/Dayton area has nearly doubled since the chapter formed in late August. The SOV Chapter recently had its second general meeting which was attended by over 90 case managers who were treated to a fantastic dinner and great CE program. The SOV Chapter is excited about the coming year and is looking forward to continuing to reach out to the case management community to help the chapter grow, thrive, and ultimately help accomplish the mission of CMSA.

The SOV Chapter also extends a warm thanks to the officers of the Central Indiana Chapter, who have provided ongoing support, and even had two officers come to the most recent SOV Chapter meeting in person! This kind of collegiality is what chapter leadership is all about-helping each other to learn, grow, and succeed

## **Philadelphia, PA**

The Mid-Atlantic chapter celebrated Case Management Week during their October educational program on *Emerging issues in Transplants* with speaker, Deb Maurer R.N. MBA. The attendees enjoyed a wonderful dinner during a credited program sponsored by Roche Pharmaceuticals. The chapter secured a proclamation from the governor's office and chapter president Barbara Kuritz gave all of the board members and officers this year's CMSA pins. They also raffled off great gifts to the members! Over the next few weeks, the chapter will begin planning their holiday party scheduled for December 8.

## **Chattanooga, TN**

Chattanooga Chapter CMSA held their monthly meeting on November 8, 2005. The program was *Advancements in Orthopedic Surgery*. Over 60 members and visitors attended. Members and corporate sponsors were thanked for their ongoing support of the chapter. First time visitors were encouraged to join CMSA. Attendees enjoyed a wonderful catered lunch and received a goodie bag of additional items gathered for celebration of Case Management Week. The Seminar Committee reported on plans underway for their annual spring seminar April 21, 2006. 2006 will be a special year as the chapter celebrates the chapter's tenth anniversary.

## **Dallas, TX**

Dallas/Ft. Worth Chapter members recently participated in the Diabetes Walk to support & raise money for the American Diabetes Association & local affiliates. The Chapter was able to donate \$150. This activity was part of the Chapter's commitment to community service.

Scholarships for the February Annual Conference will be offered to Case Managers from the areas devastated by hurricanes Katrina & Rita. The scholarships are being provided through the generosity of Chapter sponsors & include conference registration & 2 nights in the conference hotel. Anyone interested in additional information may contact the conference planner (800) 318-4408.

The Chapter is collaborating with CMS & national CMSA to provide "infomercials" & educational sessions on the Medicare Part D program in the Dallas Ft Worth area. These sessions will be offered in senior citizen centers, churches & other locations. Several Chapter members have been trained to provide information specific to the new prescription drug program that goes into effect January 1, 2006.

Local food banks have been depleted with hurricane relief efforts. In an attempt to assist replenishing the banks, the proceeds from the Chapter's Holiday Party will be used to buy non-perishable food items for Dallas & Ft. Worth food banks.

The Strategic Planning Committee will offer "Lunch & Learns" to area hospitals, payor organizations & other companies that employ case managers. With the support of various sponsors, Chapter representatives will provide lunch & one hour CE on a timely topic. There is no fee for the sessions. The objective is to reach non-CMSA members.

## **Richmond, VA**

Central Virginia Chapter of CMSA held a dinner meeting October 20 and provided training on the Outreach program for Medicare prescription Drug program. They provided approximately 25 training CD-Roms to participants asking them to study the program and go forward in the local community to provide training to senior and other Medicare participants.

## Effective Meetings - Tips

Article from [www.meetingwizard.org](http://www.meetingwizard.org)

The following are some tips to help you make your next meeting successful, effective and maybe even fun.

### Before The Meeting:

1. Define the purpose of the meeting.
2. Develop an agenda in cooperation with key participants. See a sample agenda.
3. Distribute the agenda and circulate background material, lengthy documents or articles prior to the meeting so members will be prepared and feel involved and up-to-date.
4. Choose an appropriate meeting time. Set a time limit and stick to it, if possible. Remember, members have other commitments. They will be more likely to attend meetings if you make them productive, predictable and as short as possible.
5. If possible, arrange the room so that members face each other, i.e., a circle or semi-circle. For large groups, try U-shaped rows.
6. Choose a location suitable to your group's size. Small rooms with too many people get stuffy and create tension. A larger room is more comfortable and encourages individual expression.
7. Use visual aids for interest (e.g., posters, diagrams, etc.). Post a large agenda up front to which members can refer.
8. Vary meeting places if possible to accommodate different members. Be sure everyone knows where and when the next meeting will be held.

### During The Meeting:

1. Greet members and make them feel welcome, even late members when appropriate.
2. If possible, serve light refreshments; they are good icebreakers and make your members feel special and comfortable.
3. Start on time. End on time.
4. Review the agenda and set priorities for the meeting.
5. Stick to the agenda.
6. Encourage group discussion to get all points of view and ideas. You will have better quality decisions as well as highly motivated members; they will feel that attending meetings is worth their while.
7. Encourage feedback. Ideas, activities and commitment to the organization improve when members see their impact on the decision making process.
8. Keep conversation focused on the topic. Feel free to ask for only constructive and non-repetitive comments. Tactfully end discussions when they are getting nowhere or becoming destructive or unproductive.
9. Keep minutes of the meeting for future reference in case a question or problem arises.
10. As a leader, be a role model by listening, showing interest, appreciation and confidence in members. Admit mistakes.
11. Summarize agreements reached and end the meeting on a unifying or positive note. For example, have members volunteer thoughts of things they feel have been good or successful or reiterate the organization's mission.
12. Set a date, time and place for the next meeting.

### After The Meeting:

1. Write up and distribute minutes within 3 or 4 days. Quick action reinforces importance of meeting and reduces errors of memory.
2. Discuss any problems during the meeting with other officers; come up with ways improvements can be made.
3. Follow-up on delegation decisions. See that all members understand and carry-out their responsibilities.
4. Give recognition and appreciation to excellent and timely progress.
5. Put unfinished business on the agenda for the next meeting.
6. Conduct a periodic evaluation of the meetings. Note any areas that can be analyzed and improved for more productive meetings. See a sample meeting evaluation.

And remember, effective meetings will keep them coming back!

### **A Membership Checklist of Strategies to Help Your Chapter**

*Ideas adapted from Oncology Nursing Society chapter resources at [www.ons.org](http://www.ons.org).*

#### **Recruitment Ideas**

- Sponsor a “Member-Bring-A-Member” campaign on the local level.
- Encourage members to bring a guest.
- Reward members who recruit new members or guests.
- Plan follow-up contacts with guests and non-renewing members in a timely manner.
- Welcome new members/guests at the door.
- Develop and distribute a local membership directory.
- Get people involved (an involved member stays with you).
- Develop a “point” system to reward involvement in chapter activities.
- Give case managers a supply of recruitment brochures.
- Recruit two new members, get one membership free.
- Use nametags at meetings.
- Videotape a meeting and show it at different institutions.
- Bring lunch and membership information to institutions.
- Target your audience – ex. Nurses that care for patients with cancer; rather than “oncology nurses”
- Send out a needs assessment and/or satisfaction survey.
- Offer CEs for your meetings.
- Maintain a central location or rotate meeting sites.
- Develop car pooling systems.
- Offer all-day conferences.
- Offer certification review courses.
- Offer food (dinner or reservations).
- Offer a dinner/cruise along a river.
- Offer a picnic.
- Offer a weekend retreat for meetings.
- Develop your newsletter to increase your visibility and as a perk to members.
- Advertise in community bulletins, etc.
- Have door prizes at your meetings.
- Sponsor raffles at meetings (large or small)
- Have fun! Socialize! (All work and no play...)
- Use corporate and community connections when appropriate.
- Identify chapter members in local agencies/institutions to publicize events.
- Appoint organizational liaisons to hang flyers, solicit news items.
- Hang a chapter poster at every institution/organizations.
- Sponsor a vendor fair and invite potential members.
- Promote your Chapter - establish a Public Relations Committee.
- Advertise meetings on local TV or in local newspapers.
- Encourage programming with other organizations’ local chapters.
- Offer programming that meets the needs of the multidisciplinary team.

## **Retention Ideas**

- Establish an awards program to recognize the generous, talented members of your Chapter.
- Develop a flyer or brochure that outlines all the benefits of membership in your chapter.
- List the benefits of membership at least once/yr in a newsletter or highlight a different benefit in each issue.
- Annually conduct some attrition research to determine why people leave.
- Ensure that members can buy products or attend meetings at a less expensive rate than non-members.
- Set growth goals and tell your membership about it and how they can help.
- Get other officers involved in recruitment and retention.
- Conduct a phone-a-thon recruitment/retention drive.
- Recognize membership anniversaries - who has been with you for five years, ten years, etc.

## **Ideas for New Members**

- Establish a buddy program for the first several meetings the new member attends.
- Semi-annually or bi-monthly hold a small reception for new members.
- At the sixth month mark of membership, call or send a postcard asking “How’s-it-going?”
- Develop a new member kit about your chapter.
- Think about developing a new member newsletter or flyer geared to introduce your Chapter to them.
- Offer a new member orientation program annually.
- Recognize new members at meetings.
- Issue the new member a ribbon for their name tags so veteran members can help welcome them.
- Develop a new member survey to determine their needs and expectations.
- Establish a welcoming committee.
- Send a welcoming letter after they join or renew.

### How Can I Find Sponsors for an Event?

From [www.nonprofit-info.org](http://www.nonprofit-info.org).

#### Summary:

A 9-step guide for nonprofits on how to solicit corporate sponsors; and some advice from a seasoned observer.

#### Discussion:

Rebecca Mojica ([rmojica@mcs.net](mailto:rmojica@mcs.net)) submitted some advice to the FAQ on July 1, 1999. To see Jayne Cravens' comments along similar lines, jump [here](#).

Corporate sponsors seem to be everywhere in today's world. Take the Olympics, for example. Hard to imagine what the skating rink would look like without those ubiquitous banners touting fast-food restaurants and telephone companies. It's not just the big events that draw sponsors, either. Small, local events-10K runs, award dinners, neighborhood festivals-usually have a slew of corporate logos in the accompanying literature.

Why is corporate sponsorship so prevalent? Quite simply, it makes money. Done correctly, it can make a lot of money and build important relationships. Done poorly, it can cost money and waste many people's time.

I've put together a 9-step guide that offers tips on soliciting, acquiring and retaining corporate sponsors. It is by no means a "definitive" guide, but it is a good starting point. The guide was written with small- to mid-size events in mind, however most of the suggestions offered apply to larger groups as well.

*Note: This article will NOT tell you what type of event you should do. That's another subject. There are many things to choose from, from dinners to auctions to golf tournaments to walk-a-thons. Before you read the nine steps, make sure you have a good event. You should not be soliciting sponsors until you've planned the event. Once you've figured out what your event is going to be, where it's going to take place, etc., then you're ready to move to Step One...*

- [1. Determine who your audience is](#)
- [2. Set sponsorship levels](#)
- [3. Make lots of phone calls](#)
- [4. Send proposal letters](#)
- [5. Follow up](#)
- [6. Cultivate your relationships with sponsors](#)
- [7. Cultivate your relationships with non-sponsors](#)
- [8. Give your sponsors plenty of publicity](#)
- [9. Cultivate relationships with sponsors, Part II](#)

### Communicating with Elected Officials

Article from ONS Legislative Action Center, [www.ons.org](http://www.ons.org).

Heightened security measures have dramatically increased the time it takes for a letter sent by post to reach the offices of federal or state legislators. More and more, citizens are using emails and faxes to communicate their concerns and increasingly elected officials' offices prefer electronic communications for constituent contact. As a general rule, Members of Congress are far more likely to heed your message if you are one of their constituents. The following tips aim to improve the effectiveness of your correspondence, regardless of the means you choose to deliver your message.

#### Tips for Writing Congress: <http://www.ons.org/lac/pdf/10TipsLetters.pdf>

- State your purpose for writing in the first sentence of the letter. For example: As your constituent, I am writing to urge your support for increased funding for health care.
- If your letter pertains to a specific piece of legislation, identify it. And make sure that you are referencing the correct legislation to the correct body of Congress. House bills are H.R.\_\_\_\_; Senate bills are designated as S.\_\_\_\_. It is also important to know the status of the bill.
- Be courteous.
- If appropriate, include personal information about why the issue matters to you to make your point.
- Address only one issue in each email.
- Close your letter with a restatement of your purpose and indicate the response that you expect.

#### Addressing Your Correspondence to a Senator:

The Honorable [Jimmy Stewart]  
\_\_(room number)\_\_(name of) Senate Office Building  
United States Senate  
Washington, DC 20510

Dear Senator [Stewart]:

#### Addressing Your Correspondence to a Representative:

The Honorable [Jimmy Stewart]  
\_\_(room number)\_\_(name of) House Office Building  
United States House of Representatives  
Washington, DC 20515

Dear Representative [Stewart]:

#### Tips For Phoning Congress: <http://www.ons.org/lac/pdf/10TipsCalls.pdf>

Telephone calls are usually taken by a staff member, not the member of Congress. Ask to speak with the aide who handles the issue about which you wish to comment. (See our guide to Congressional staff [here](#).)

After identifying yourself as a constituent, tell the aide you would like to leave a brief message, such as: "Please tell Senator/Representative [Name] that I support/oppose [S.\_\_\_\_/H.R.\_\_\_\_]."

State your reasons for your support or opposition to the bill. Ask for your senators' or representative's position on the bill. You may also request a written response to your telephone call.