

THE CHAPTER DISPATCH

October 2005

TOPICS IN THIS ISSUE

*(To go directly to a section of the newsletter,
simply click the headings below)*

Important Dates

National Updates

Chapter Reminders

Letter from CPC Rep

Chapter Highlights

Leadership Resources

Membership Resources

Committee Resources

Legislative Resources

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; email: cmsa@cmsa.org

Membership/Chapter Services Contacts:

Michele Lee, ext 20, mlee@acminet.com

Danielle Marshall, ext 19, dmarshall@acminet.com

Claudia Collins, ext 10, ccollins@acminet.com

AT A GLANCE – Important Dates

Mark your calendars!

2005

October

Oct 31 National Board Nomination Deadline

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

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

CALL FOR LEADERS

Get involved on a National level! CMSA, the world's largest organization of case management professionals is seeking future leaders to serve as officer, director, and international director. CMSA is a not-for-profit Section 501(c)(6) professional society that is governed by an elected Board of Directors, supported by appointed Task Forces, and staffed by a professional association management company.

All individuals interested in serving in a leadership position must complete the [Election 2006 Nomination Packet](#). All Election Forms must be postmarked or faxed to the CMSA National Office by **October 31, 2005**. Deliberations of the Nominating Committee will remain confidential. For more information, visit: <http://www.cmsa.org/professional/nominations/>.

Member Get a Member Campaign

Jump on the recruitment wagon from Sept 1 – Nov 30. Get your members to be involved in the recruitment. The more members you can get to recruit, the more voices that will be out there helping your chapter to grow! For more information on this Fall's Member Get a Member Campaign, visit www.cmsa.org/Membership/recruitment/.

As of Oct 15 - 30 members have already been recruited. Laura Bachrach of Phoenix & Elaine Halloran of Long Island are currently tied at first place with 5 recruits each. Other Recruiters include:

- o Bartz, Brenda
- o Berry, Paula
- o Colahan, Sandra
- o Diaz, Deanna
- o Edwards, Villa - 2
- o Eileen, Roddy
- o Erthal, Debbie
- o Foell, Doris
- o Gershen, Joan
- o Herdade, Diane - 2
- o Lawrence, Patricia
- o Lusch, Gina
- o Phipps, Diane
- o Smith, Ann Marie
- o Snapp, Tina
- o Tiukinhoy, Emylou

It's not too late to complete the Recruitment Section of the applications and hand them out. Encourage all your members to get involved. This is not a contest among board members only.

Hurricane Katrina

The Case Management Society of America joined the entire nation in expressing our sincere concern and empathy for the many victims of Hurricane Katrina. Assistance is still needed for the communities devastated by Katrina. As proven in previous times of tragedy, the association community is uniquely positioned to assist in both immediate relief efforts and the long-term recovery of these severely damaged communities.

CMSA currently has approximately 45 members in the original zip codes most damaged by Hurricane Katrina. CMSA National provided these 45 members with a 6 month extension on their membership, as many do not have time to focus on their professional resources at this time. In addition, CMSA National donated leftover tote bags to relief centers in Texas for use in the distribution of materials to hurricane victims. CMSA has been in contact with a large number of members in the area and have been awed at the strength & courage that each of them has shown. In addition, many CMSA members in the surrounding areas and chapters across the U.S. have compiled considerable resources to aid those in desperate need. These efforts are critically important to the relief efforts of those in the area and for many temporary shelters across the U.S. Some of these efforts are expressed below:

After the **Chattanooga Chapter** hosted a meeting luncheon from a local restaurant, the leftover food was delivered to the local Red Cross - FEMA Service Center where a number of hungry Katrina refugees had been

for several hours waiting to be seen by the counselors, along with their children. Donations were accepted from members for the Red Cross or the local Community Kitchen which was working with hurricane refugees brought to the area. The Board had voted the week before that the Chapter would match donated funds. The total donation equaled \$740.00.

The **Charlotte Metro Chapter** donated baby formula from gathered at their conference to the Crisis Assistance Ministry.

The **New England Chapter** sent out an email blast to members asking for donations of household convenience items for hurricane relief to bring to the conferences. Bags of things showed up at the Member Booth out of nowhere. Instead of saving their conference totes for use during the year, the chapter donated the surplus and some of the participants dropped off their totes, as well. The chapter also asked the vendors if they had any left over promotional items that they did not want to take back with them, to consider donating things like paper, pens, water bottles, sewing kits, etc. Their generosity was very touching. All items are being sent to a relief mission that will distribute them.

Being there are multiple evacuees in Texas, members in both the Houston and Dallas chapters have pulled together to provide direct assistance. CMSA's **Houston/Gulf Coast Chapter** has many member volunteers working with the hurricane relief efforts. The Chapter supported these efforts by collecting clothing, nonperishable items, and monetary funds at each monthly educational luncheon. These items were donated to the Astrodome Collection Center. The Chapter also donated all left over t-shirts and tote bags from their Annual Educational Conference to this collection center. With their meeting facility being located directly across the street from the Astrodome and the Reliant Center, the scope of this historical disaster is very much uppermost in their hearts and minds. The **Dallas/Ft. Worth Chapter** of CMSA recently donated \$1,000 to the American Red Cross in honor of their sister chapters and fellow members in New Orleans, Alabama and Mississippi.

At the **Philadelphia** September chapter meeting, donations were collected for the American Red Cross for the Katrina disaster. In **Detroit**, attendees made donations to the Mississippi Nurses Association relief fund to assist nurses who have suffered severe losses as the result of Hurricane Katrina.

In **Atlanta, GA** several members have responded to the Gulf Coast hurricanes by working in Red Cross shelters, or, in one instance by setting up and staffing a shelter for evacuees. The chapter has decided to wait to formulate a "hurricane initiative" until they know better what these folks need. They are discussing partnering with Habitat for Humanity and wielding hammers for this cause.

Over the past weeks since hurricane Katrina, CMSA National has been working on a number of customized solutions to aid case managers in relief efforts. As the professional association for case managers, a great struggle has been determining how to bring together individuals who lost their livelihoods with those employers willing to help by hiring them. To contribute in this area, we are pleased to report the addition of the KATRINA Module at www.cmsa.org/careers.

The KATRINA module allows:

Employers

- Can flag themselves as offering Katrina positions to displaced jobseekers by flagging the job posting.
- Have a text box to describe how their position is helping in the effort to provide employment to Katrina victims.
- When an employer searches resumes, all Katrina jobseekers will be displayed with a flag identifying them as such.

Jobseekers

- Have a checkbox to flag themselves as Katrina victims.
- Have a text box similar to that of employers to describe how they have been affected and the type of employment that they are looking for.
- When a jobseeker searches job postings, Katrina postings will be displayed with a flag and identified as such.

CMSA to Help Educate Seniors about New Medicare Prescription Drug Coverage

In keeping with its commitment to positively impact and improve patient well-being and healthcare outcomes, the Case Management Society of America ([CMSA](#)) has announced its support of the efforts of the Centers for Medicare & Medicaid Services ([CMS](#)) to maximize the awareness of seniors and their caregivers and families about the new landmark [Medicare prescription drug coverage](#).

CMSA is extremely excited to have this ground-breaking opportunity to work directly with the Centers for Medicare & Medicaid Services (CMS). For the first time, CMS reached out to CMSA recognizing the enormous reach case managers have in the Medicare market. Partnering with CMS on this project provides CMSA with a level of visibility heretofore, unavailable.

In the coming weeks, each chapter will receive a training kit from CMS entitled Medicare and You. Inside the kit you will find all the material you will need to train your members and conduct community-wide education programs. You can also expect to receive a call from your local SHIPs representative. Together, we hope you will serve as ambassadors throughout your communities and particularly in some of the hard-to-reach areas. CMS is keenly aware of the advocacy, integrity and simply the level of comfort your presence will bring as they seek to ensure seniors make an informed choice about enrollment in this program. Since there are penalties for late enrollment, we hope CMSA chapter representatives can provide significant support to the local SHIPs representatives. Please note participation is strictly a voluntary effort. CMSA has not committed our local affiliate chapters to this project; however, we do hope you will find this an opportunity worthy of your consideration. For more information, watch CMSA's home page.

CMAG-1 ADVANCED

CMSA and the Centers for Medicare & Medicaid Services (CMS) are excited to bring you this **hands-on Training Seminar**, designed to help you more effectively improve patient adherence to their medication regimen. This presentation will also cover some of the changes legislated by **Medicare Prescription Drug, Improvement, and Modernization Act of 2003** and provide overviews of the new benefits, options, processes, and timelines for enrollment. For more information on the program, visit www.cmsa.org/cmag.

UPCOMING WORKSHOPS:

SEMINAR 2: Boston, MA – November 16, 2005 / 8:00a – 5:00p

SEMINAR 3: Long Beach, CA – January 19, 2006 / 8:00a – 5:00p

TOPICS TO BE COVERED:

- Medicare Rx Prescription Drug Coverage
- Non-Adherence as a Systemic Problem
- The Cost of Non-Adherence
- What is Known about Adherence
- Case Management Adherence Guidelines
- Health Behavior Change
- Application Along the Care Continuum
- Getting Institutional Buy-In
- The Tracker

NOTE: CMAG Advanced is not a continuation but an enhanced version of the original workshop from Oct 04 – Apr 05.

CHAPTER REMINDERS

Case Management Week 2005

National Case Management Week was a huge success this year! A lot of outreach and recognition took place this year. Thanks to everyone that had a hand in planning events, educating others, recognizing case managers and advancing the industry! Next year will be October 8-14, 2006. Information will be online by January 2006 to help you in your planning efforts. Let's take it to a new level next year and continue to spread the word.

Please be sure to send National a note to let them know what Proclamations were received for your state or city, and a couple of paragraph highlights on your CM Week celebration events, activities or special recognition.

This information is due by Oct 31, 2005.

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.

LETTER FROM YOUR CPC REP

Greetings Chapter Leaders,

Case managers are a tremendous, and at times, untapped resource. We are ready, willing and able to help solve the healthcare puzzle for our clients and healthcare providers. Our chapters are the strongest link that represent CMSA to our respective local communities. We *are* the face of case management. In the coming months, our faces are hopefully going to become much more recognizable. There are quite a few exciting happenings going on and I would like to take a moment to touch on a few of them.



With the impending implementation of the Medicare Prescription Drug Coverage benefit, the importance of CMAG has returned to the forefront as a key way in which to increase awareness regarding patient adherence to medication regimes. CMSA is presenting **Adherence Guideline Advanced Training** to cover some of the changes legislated by Medicare Prescription Drug, Improvement, and Modernization Act 2003 and provide overviews of the new benefits, options, processes and timelines for enrollment. There are only three sessions scheduled across the United States, St. Louis, MO, Boston, MA and Orange County, CA. Registration details are available at <http://www.cmsa.org/CMAG/Advanced.aspx>.

In addition to Adherence Guideline Advanced Training, CMSA supports CMS efforts to maximize of seniors and their caregivers about the new **Medicare Rx Prescription Drug Coverage** program beginning on January 1, 2006. The purpose of CMSA's involvement is in support of CMS-developed education sessions regarding the prescription drug benefit. Additional information may be found at www.cms.hhs.gov/partnerships. Materials will be supplied by CMS to each of the 70 CMSA chapters. This material covers how to help with triage and assistance sessions, how to inform hard-to-reach beneficiaries, and how to conduct person-to-person counseling and assistance within their individual caseloads. To encourage participation, CMSA has planned a recognition program for chapters and their members. For more information visit the CMSA and scroll down to the section titled "Medicare Rx Prescription Drug Coverage".

CMSA's **Get-A-Member Campaign** is underway. Though CMSA currently has more than 9,000 members there is always room for growth. A stronger Society can only serve to enhance and improve member opportunities. You must be a current CMSA members to participate. All new member applications must be received with payment by November 30, 2005. For details, visit the CMSA Member Recruitment page at <http://www.cmsa.org/Membership/Recruitment/>.

Finally, a great big thank you to every chapter who participated in **National Case Management Week** by hosting educational programs and conferences, honoring chapter members, obtaining state proclamations, and simply for being the very best case manager you can be on a daily basis. Congratulations!

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 under the Contact tab.

Pending Chapters

Lexington, KY

The Bluegrass State Chapter of CMSA is currently averaging 20-21 participants at the monthly meetings. There are plans to meet again in November. Currently, companies are clamoring to host their meetings and the group is very excited at the response. The group is currently putting together some committees, while the local newspaper is publishing their meeting information.

Cincinnati, OH

The Southern Ohio Valley CMSA Chapter held their kick-off meeting on September 21st with **88** people in attendance--what a great turnout! There is so much enthusiasm and support for this chapter. The evaluations for the evening were overwhelmingly positive. Attendees really loved Dr. Bruce Berger as he conducted the same presentation from the National Conference in June 2005. The reaction was again completely positive. Some feedback included comments that this was the best program/in-service they've ever had in their entire nursing careers! The chapter hopes to see a gradual increase in memberships from the Cincinnati-Dayton area—as they are trying their best to show people the value of membership!!!

Las Vegas, NV

Case Management Association of Las Vegas is preparing to celebrate their first year anniversary with a gala Holiday Party hosted by Care Meridian of Las Vegas. The CMA-LV organization has had a very successful first year as demonstrated by the following accomplishments.

1. Hosted 5 educational seminars from 11/04-12/05
2. Outreached to over 150 Case Managers in the Las Vegas area
3. Established an active membership of over 40 CMs
4. Developed a 2006 business plan that includes affiliating with CMSA by end of first quarter 2006.
5. Enhanced the professionalism of case management in the Las Vegas area
6. Designed their own organizational logo that speaks to the vision of educating CMs

In acknowledgement to the dedication of CMA-LV's planning committee members who have worked tirelessly this year to position the organization for success - Thank you to Marcia Anderson, Lorraine Cenatiempo, Claudia Douds, Valerie Grosjean, Shelly Martin, Barbara San Marco, and Sandy Sepich for without your assistance, this group would not be poised to celebrate their first anniversary.

Official CMSA Chapters

Little Rock, AR

The Central AR Chapter received a proclamation from Governor Mike Huckabee declaring October 9-15 as National Case Management Week for the state of Arkansas. The chapter has also scheduled November 10, as their annual Vendor Fandango which is a health professional exhibitor fair for the central AR medical community. New officers will be transitioned in November.

Newark, DE

For CM Week, the chapter is manning a table at the local trauma center, Christiana Care Hospital. They also hosted a luncheon on Oct. 13 with a topic on pay-for performance.

Dade/Broward Cty, FL

South Florida Case Management Network has begun the year with several initiatives. They are focusing on a Community Outreach program to benefit Multiple Sclerosis. The Chapter has made a commitment to raise \$7,000. They are also focusing on membership by having a "Night Out at the Movies." The chapter will be renting out a movie theater and inviting SFCMN members to bring along other Case Management professionals that can benefit from the organization. A monthly newsletter will be sent that will have educational information, meeting information, and website updates to name a few topics of interest. This is just a few of the initiatives the chapter is starting the year out with. They are looking forward to a successful year and will do all they can do to provide quality education and information.

Atlanta, GA

CMSG –Atlanta recently held a dual board strategic planning meeting at which the roles and duties of each officer and board member was discussed, committee chairs solicited and goals for 2005- 2006 were established. The board is pleased to have had an increase in members interested in being willing to serve in leadership capacities. The goals for this year include increasing the membership by challenging each current member to invite one potential member to one of the bimonthly meetings and to add expanded committee members to existing projects.

The chapter proudly assisted in organizing and sponsoring a loving tribute to the 2004 CMOY, Mary Hoyt. Artist Jill Palermo was commissioned to complete a cellular portrait entitled "Gateway". This painting encompasses three panels and can be viewed on the artist's web site www.jillpalermo.com. The final tribute will be permanently housed at a place of Mary's choice within the Atlanta community.

CMSG –Atlanta once again kicked off National Case Management Week by presenting their annual conference entitled "Winning Big with Case Management". This event was held on October 8, followed by countless months and hours of planning. There 125 case managers enjoyed topics ranging from liver transplantation to hospice care to stress management. The chapter is fortunate to have community support in the form of a sold-out vendor space for this event.

The chapter has members who are employed in area hospitals, insurance companies, managed care companies, local medical providers and private companies. The Board represents all areas of practice in leadership positions in the hopes of realizing the membership and involvement goals.

Des Moines, IA

The Iowa Chapter held their Diamond Anniversary conference on August 26th. They had 67 attendees who enjoyed the one and only CMSA President, Susan Rogers, as the keynote speaker. Susan did a fabulous job of discussing adherence and placing value on Case Management. There were three breakout speakers in the afternoon. Their vendor population was very generous and supportive. The conference ended with a diamond give away. Who wouldn't love that?!

In keeping with the diamond anniversary, the chapter held a celebration/ membership drive on September 29th. The networking was wonderful and the food was fabulous - complete with wine and a chocolate fountain. At the October board meeting, the chapter will evaluate the outcome of the conference and celebration. They are confident that they have generated some new interest for memberships.

Chicago, IL

In celebration of National Case Management Week, CMSA Chicago hosted this month's dinner meeting with focus on the case manager's self growth & development. They invited a wonderful speaker, Mary Sue Reining. This program was free to members (usual charge is \$10). In addition, the chapter gave membership pins to all who were present.

Fort Wayne, IN

A Senior Fair was offered in the Fort Wayne area in September. The CMSA Chapter provided a table to educate the elder population on case management services. Case Managers took turns staffing the table. The goal was the education of the area on the function of case management and how CMs can assist with direction to determine appropriate focus of care and move it along the continuum.

The Fort Wayne, Indiana Chapter of CMSA had a conference titled the "Injured Brain and the Aging Brain" on September 14 with a record number of attendees and vendors for the year. The focus was brain injury, rehabilitation, diagnostic testing, and how the brain ages. The education, networking, and resource opportunities were outstanding at the conference. The speakers were nurses, physicians, radiology representatives and a former brain injured patient. Hearing from the brain injured patient with the positive effect that case management had on his care was very rewarding for the group.

After the conference, 50% of the members attended a free dinner at the Chop House in Fort Wayne. This is an annual event offered to all members. Introduction of new board and officers was part of the program. Plaques in recognition of the prior year of service were to be distributed. Everyone had fun getting to know new faces and extending a welcome to those that were new acquaintances. This group is a wonderful warm group that has relationships as a primary focus in their nursing practice and within the CMSA.

Baltimore, MD

CMSA of the Chesapeake's all day conference was held at the Maritime Institute on October 11. "Setting Sail for New Horizons in Case Management" had over 120 attendees and 40 vendors. Dr. Austin Errico from Lakeview NeuroRehabilitation Center and Melodie Chenevert, RN were the keynote speakers. In November, the chapter will host two programs: Nov 9 - Estate Planning-Pediatric to Adult Population and Nov 30 - Medicare Part D.

Detroit, MI

The September 13 dinner conference was well attended and the topic "Mechanical Manipulation under Anesthesia" was well received. For Case Management Week, two CMSA members that attended the conference received CMSA membership renewals. All members will be receiving a bookmark in honor of Case Management Week.

Charlotte, NC

The Charlotte Metro CMSA in conjunction with the Piedmont Triad Chapter of CMSA held a conference September 15-16 in Charlotte, NC. The chapter has had wonderful reviews of the conference including the speakers, the location and the food! Next year the conference will be held in the Winston-Salem/Greensboro, NC area. There were 90 case managers in attendance of the conference and approximately 45 vendors for a total of 170 persons. The next regular CMSA Meeting will be November 8, covering information on the Medicare Part D program.

Woodbridge, NJ

New Jersey Chapter launched their 2005-2006 meeting season with their Annual Meeting held on September 14 at the Woodbridge Hilton Hotel. Over 120 attended this kickoff meeting, witnessed the swearing in of the new Board of Directors and Officers and greeted Past-President Pat Hayden (1999-2000) who officiated at the swearing-in ceremony. Pat is now a resident of Florida, (the chapter's first formally retired case manager) and she came a long way to do the honors. A particularly dynamic speaker, Steven Benvenisti, Esq., a local attorney, left the audience gasping with surprise when he ended a fascinating tale. Nine local providers were on hand to exhibit at the meeting,

The chapter welcomed Susan Hughes of Horizon BCBS of NJ and Marianne DiMola of Pathway-Medical joining the ranks of the Directors. The Board will be sporting a new look come the October 19 meeting when they sport their new NJCMSA shirts. The activities to commemorate National Case Management Week included another "first" for the chapter. The chapter conducted an interactive panel discussion of "The Case Manager's Role in Optimizing Outcomes for the Patient with Congestive Heart Failure."

The chapter recently reinvented their Newsletter and also launched the first edition of "Over the Fence at NJCMSA," a networking newsletter featuring accomplishments, promotions and news of individual member activities and offering employment opportunities in case management available locally in New Jersey, and in nearby New York and Pennsylvania. Irene Leather, NJCMSA's Executive Director, is the editor of both publications.

The chapter is looking forward to greeting Connie Commander, National CMSA President-Elect, 2005-2006. Connie will be bringing valuable information about the partnership of CMSA and CMS to promote education of the Medicare Part D new prescription benefit.

Hudson Valley, NY

The Hudson Valley Chapter of CMSA is in full swing for the upcoming year. As promised, they are reaching out to case managers in the northern counties by offering a sunset dinner cruise on the Hudson River aboard the paddle boat, The River Rose. This meeting offered an opportunity to share the benefits of membership in CMSA and celebrate Case Management Week. Time was allowed to enjoy the views and network before providing an educational program on RSV and Influenza.

To fulfill one of the membership goals for 2005-2006, recruitment will march on into another northern area in December. The Board will continue north to the Capitol District of Albany to promote CMSA. They are hoping to see membership grow in this area and are anxious to meet new professionals who will be willing to assist with the expansion of the Chapter.

Philadelphia, PA

The Mid-Atlantic Chapter's kick off meeting for the year was a big success with more than 60 attendees. This program was "Returning to the Community after a Brain Injury: the Realities of Re-entry" by Ann Marie McLaughlin, PHD. Members of the chapter who attended the CMSA conference in Orlando gave an overview of the conference. The Chapter President displayed the chapter awards received for outstanding website and chapter growth. In October, the meeting focused on celebrating Case Management Week with a program on Transplants.

Chattanooga, TN

Chattanooga Chapter CMSA held their monthly meeting on September 13. The program was "Insights in Case Management: Continuity of Care for Cancer Patients". Roche provided a wide variety of educational materials. 24 visitors attended the meeting and were provided with information on becoming a member. Membership voted and approved a recommendation from the board to decrease local membership fees by \$10.00 for the next twelve months allowing potential new members and all current members the opportunity to benefit from this savings and encourage membership participation.

On October 11, they held a special meeting honoring the members during Case Management week. Kathy Lambert provided an excellent and humorous program titled "Liability and Laughter". There were 120 in attendance! Members were treated to a sit down luncheon, numerous door prizes and a goodie bag. A local corporation allowed the chapter to set up a display in one of their downtown windows in honor of Case Management Week.

Knoxville, TN

The TN Valley Chapter is held their annual Community Resources meeting October 18. All members of CMSA will be admitted free. There were six community agencies that highlighted their services for the community and gave case managers more information to tap into in this area. The chapter also honored area case managers with many door prizes and a drawing for one lucky attendee to receive a free admission to the annual March conference. This is a celebration of case management and this meeting is always highly attended. In conjunction with this meeting, the chapter holds their annual membership drive. They pay local dues for any new member that joins at this meeting.

Dallas, TX

The DFW Chapter continues to become involved in community service activities. Recent opportunities for giving back to our community included the AIDS ARMS Walk, Susan G. Komen Walk & the Memory Walk for the Alzheimer's Association. Chapter members participate in activities of their choosing. The goal is to have CMSA member representation at major community service activities.

October is Breast Cancer Awareness month. The Chapter is recommending that everyone learn more about breast health such as self exam & mammography. As healthcare professionals, the case managers must set the example of good wellness habits.

National Case Management Week was celebrated with recognition of local case managers & the contribution they bring to the healthcare community. Chapter officers, board members & members received a special message from the Chapter President. The governor of Texas & mayors from both Dallas & Ft Worth have recognized the week with special decrees.

Milwaukee, WI

The Milwaukee Chapter recently held their annual Fall Conference, titled, "Into the Future with Innovation and Compassion". Presentations by local speakers included - Surgical Management of Morbid Obesity, the Challenges of Health Care Delivery in Metropolitan Milwaukee, Advances in Spinal Surgery: Charite Total Disc Replacement and More, Acupuncture: Ancient Medicine for the Modern World, What's New in Pain Management, and Rabies Management 2005. Keynote speaker was the nationally known Nancy Skinner, speaking on Healthcare in America: You Won't Believe What's Happening Now! and Take this Job and Love It! There were more than 100 attendees present. Attendees were treated to a cocktail cruise by one of the speakers, Dr. Sridhar Vasudevan, after the conference. This was one of our best Conferences yet. This was the 6th Conference and all the years of hard work in getting to this point has really paid off.

The chapter is currently working on the scholarship created in memory of their late past-president, Linda Smedema, who passed away this past August.

How Do We Safeguard Against Conflict of Interest? www.boardsource.org

When the personal or professional concerns of a board member or a staff member affect his or her ability to put the welfare of the organization before personal benefit, conflict of interest exists. Nonprofit board members are likely to be affiliated with many organizations in their communities, both on a professional and a personal basis, so it is not unusual for actual or potential conflict of interest to arise.

Why must we be concerned about conflict of interest? Board service in the nonprofit sector carries with it important ethical obligations. Nonprofits serve the broad public good, and when board members fail to exercise reasonable care in their oversight of the organization they are not living up to their public trust. In addition, board members have a legal responsibility to assure the prudent management of an organization's resources. In fact, they may be held liable for the organization's actions. A 1974 court decision known as the "Sibley Hospital case" set a precedent by confirming that board members can be held legally liable for conflict of interest because it constitutes a breach of their fiduciary responsibility.

Does conflict of interest involve only financial accountability? No. Conflict of interest relates broadly to ethical behavior, which includes not just legal issues but considerations in every aspect of governance. A statement by INDEPENDENT SECTOR describes three levels of ethical behavior: obeying the law; decisions where the right action is clear, but one is tempted to take a different course; and decisions that require a choice among competing options. The third level of behavior can pose especially difficult ethical dilemmas for nonprofit board members.

What can we do to prevent conflict of interest situations? Self monitoring is the best preventative measure. Institute a system of checks and balances to circumvent actual or potential conflict of interest, beginning with well defined operating policies on all matters that might lead to conflict. Most important, create a carefully written conflict of interest policy based on the needs and circumstances of the organization. Ask each board and staff member to agree in writing to uphold the policy. A conflict of interest policy should be reviewed regularly as part of board self assessment.

What should be included in a conflict of interest policy? A policy on conflict of interest has three essential elements:

1. FULL DISCLOSURE.

Board members and staff members in decision-making roles should make known their connections with groups doing business with the organization. This information should be provided annually.

2. BOARD MEMBER ABSTENTION FROM DISCUSSION AND VOTING.

Board members who have an actual or potential conflict of interest should not participate in discussions or vote on matters affecting transactions between the organization and the other group.

3. STAFF MEMBER ABSTENTION FROM DECISION-MAKING.

Staff members who have an actual or potential conflict should not be substantively involved in decision-making affecting such transactions.

What are some examples of actual and potential conflict of interest?

- Organization policy requires competitive bidding on purchases of more than \$1,000, but a printing firm owned by a board member's spouse receives the \$25,000 contract for the annual report and no other bids are solicited.
- A board member serves on two boards in the community and finds himself in the position of approaching the same donors on behalf of both organizations.
- A staff member receives an honorarium for conducting a workshop for another group in the organization's field of interest.

Should an organization contract with a board member for professional services, such as legal counsel or accounting? Attorneys, accountants, and other professionals can contribute valuable expertise to a board. Due to the potential for conflict of interest, their contributions should be voluntary. At the very least, a board member who is associated with a firm competing for a contract should abstain from discussion and voting in the selection process. If a competitive bidding process results in the selection of that board member's firm, he or she should disclose the affiliation and abstain from voting on future board actions connected with that firm's contract with the organization.

Why Members Join Your Chapter, By Leadership Coach Cynthia D'Amour

No matter what type of association you are, there are three key benefits that motivate people to join your chapter – and to continue staying involved.

1. They want personal/professional development.

This includes the formal education programs that you offer as well as the skills members learn while being active in your chapter.

2. They want to contribute to some greater good.

This may be raising the standards of your industry, paying for a scholarship or working on intensive community service projects. The key is to design an opportunity for contribution that is relevant to your membership.

3. They want to be part of your community.

People want to feel like they belong to a circle of friends who care about them. Your association must find ways to offer all three of these benefits regularly.

Three frequent mistakes related to these benefits:

1. Chapters put all of their emphasis on one key reason.

Different people are looking for different outcomes from involvement in your chapter – no matter what your association's main purpose is. You need to weave all three benefits into your chapter events and promotional materials.

2. Leaders think their members should "get" the benefits – and do not bother to spell them out in promotional materials and at meetings.

You need to regularly remind your members why it's worth the investment of their time to be active in your chapter in order to keep their involvement a priority for them.

3. Chapters underestimate how hard it is for the typical person to get involved with people they don't know.

Walking into a room of strangers is a very stressful experience for most people. Help your new members break through their fears and find their comfort zone in your community.

ACTION STEP:

Take a few minutes to look at how you promote your meetings and projects. Do you emphasize all three benefits regularly? If not, how can you start to weave them in?

Nip and Tuck - 30 discreet ways to save money By Cheryl-Anne Sturken and Tom Isler

An adapted version is seen below. [Click Here](#) for full article.

Even in financially strong organizations, a heightened emphasis on the bottom line remains the basic framework upon which today's events are crafted. There are still plenty of ways for budget-minded planners to save on costs without sacrificing quality or value. Here is the best advice from experts in every major aspect of event realization.

Audiovisual

- 1. Have it your way.** Some hotels try to strong-arm you into using in-house A/V services whose prices tend to be way, way higher than street prices.
- 2. Use what's there.** A number of experts recommend getting the most out of a venue by using the built-in audio system instead of renting an external setup.
- 3. Bless the darkness.** Beware of natural lighting. Avoid spaces with skylights or large windows that would have to be blacked out during presentations or would require super-bright projectors or special screens. Those could easily run \$5,000 per day.
- 4. Reserve the space.** If a meeting will require A/V equipment over multiple days, see if a venue will allow exclusive use of conference rooms, so technicians need only to set up the equipment once, and clients will save on labor bills.
- 5. Mind the labor.** Labor charges can surprise planners. Negotiate a day rate instead of an hourly rate for jobs that will require more than eight hours of work. If a day rate isn't available, be careful not to run into mealtime penalties with union workers, and keep setup and take-down during regular work hours to avoid paying overtime. Planners also should review labor charges at the end of each day to note any discrepancies with the original quote.
- 6. Do it yourself.** Save a lot by putting their own energy and resources into A/V offerings. For example, self-producing PowerPoint presentations, slide shows or video clips, if possible, instead of outsourcing the job.
- 7. Simplify.** Sometimes the "wow" factor can be overrated. Try to organize the event so one projector can satisfy your A/V needs. Using floor-supported lights instead of hanging lights is simpler. Good rule of thumb: If it doesn't add significantly to the décor, lose it.
- 8. Don't wait.** Get proposals signed and back to an A/V supplier 30 days prior to the event.

Décor

- 9. Go with the available flow.** Why waste money on expensive décor to create a theme when the venue speaks for itself? When you meet in a unique space, like a museum or aquarium, the atmosphere is already created for you.
- 10. Head toward the light.** Lighting is an easy way to add depth and substance to any room, and it can be done for pennies. Just adding lighting to a decorated room gives it that much more punch, so you don't have to waste money on lavish props.
- 11. Cultivate hang-ups.** If you hang lots of bright, colorful fabric from the ceiling and drape the walls with it, then add back lighting, it creates a very dramatic effect. The more fabric you use, the greater the effect.
- 12. Think big.** Decorating with large props is a good way to get more "wow" on a tight budget. If you were doing a New York-themed event and had only \$300 to spend on décor, spend it all on one very large Statue of Liberty rather than several small ones. One over-the-top piece creates a strong visual effect and becomes the focal point of the room. Smaller items just get lost in the overall décor, because they don't make a statement.

Entertainment/Speakers

- 13. Keep the total fee in mind.** Be realistic when choosing entertainment. A live band might seem more appealing than a deejay or a magician, but when totaled up, the added costs of the band's performing requirements can derail a budget. These costs can be higher than the fee for the band itself.
- 14. Catch the show on property.** Many resorts provide on-site entertainment showcasing local talent. Building such a show into the agenda provides great value, because no off-site transportation is required.
- 15. Maximize speaker potential.** Often a speaker can fill more than one role at a meeting. Look to use a speaker in multiple capacities, such as keynoter and then for a breakout session. It's more cost effective than paying for two people.
- 16. Control travel costs.** Choosing a speaker who is within driving distance of the venue will help the budget. If that's not possible, travel can be a big variable. Instead of offering a speaking fee plus travel expenses, plus a hotel room, offer a lump fee plus the hotel. That puts the onus on the speaker to control his travel costs.

Food and Beverage

17. Pick a number. The best way to get the most out of your money is to name the figure you want to spend on food and beverage up front, and leave the creative problem-solving to the caterer.

18. Do more with less. There are simple ways to avoid paying top dollar on F&B. Go with two or three courses instead of four. Stretch the staff-to-guest ratio. Offer only beer and wine, or only one specialty drink — perhaps a festive (and inexpensive) sangria, instead of a full bar. Slice shrimp in half so arrangements can be made to look twice as large. Offer chips and various dips rather than fancy hors d'oeuvres.

19. Institute portion control. One popular money-saving trick is to serve heavy hors d'oeuvres instead of a plated dinner, because they will eliminate the need for multiple courses and a large waitstaff. However, the technique isn't foolproof. Buffets can be more expensive because planners tend to order too much food, and if hors d'oeuvres are served by the staff, labor costs still can be high. Portions can be controlled easily for plated dinners, which, as long as they consist of relatively inexpensive items such as chicken or pasta, might end up being more cost effective.

20. Spice it up. Adding spices to an inexpensive chicken dish can lend a special flair or give a theme to the meal without driving up costs.

21. Make it a double. If a hotel is catering other events on a given night, find out what's being served. If the cuisine is appropriate for your meeting, sign your group up, too. The hotel already will have the ingredients on hand and can keep the labor and preparation costs low.

22. Opt for tried-and-true. Choosing a well-established off-site catering company for an event can be advantageous.. For large events, most companies can lower prices, thanks to the favorable economics of buying in bulk.

23. Lose the extras. Food prices generally are fixed, but planners should rethink the equipment and décor they require, the serving items they're ordering and how many people they need to staff the event. Tables can appear just as elegant topped with plain cotton linens as with something fancier.

24. Ask the question. It's always worth inquiring to see if any additional F&B discounts can be negotiated. A lot of people don't, and if you don't ask, you won't ever get it.

Lodging

25. Pursue off-peak values. Planners who are willing to try a destination in its off-season stand to reap tremendous value in room rates. The planner who has flexibility can take advantage of that. Indeed, pricey digs are surprisingly affordable in the months they consider off-season, even if the destination is still humming with activity.

26. Go where the rooms are. A strong business climate and a slow pipeline of new full-service hotel inventory have created a buildup in demand in key primary markets, such as New York City and Boston. But there still is plenty of room availability in other markets that have enjoyed strong hotel growth in recent years. And the more room inventory a destination has, the greater the room-rate competition.

27. Fill those fillers. All hotels have dates pegged as fillers. Not to be confused with off-peak seasons, these are specific days, perhaps right after a major holiday, when business is historically slow and the hotel is willing to offer considerably more attractive rates to groups in exchange for a firm commitment.

Transportation

28. Avoid peak season. Shuttling attendees around during a destination's peak travel times costs more. The reason? Equipment is in greater demand, so companies charge higher rates. Schedule transportation to take advantage of slow periods.

29. Consider the basics. Be up front with the transportation company about event needs. If the event is a citywide for a nonprofit group, and bare-bones shuttling between the convention center and hotels is all that is required, don't assume you need a coach bus. Another option, most coach companies have older model coaches in their fleet that are completely safe and in great condition and that are cheaper to rent.

30. Shuttle in loops. Doubling up on shuttle loops between the convention center and hotels is more cost-effective than transporting everyone in one fell swoop. For example, if 10 buses are needed to transport 500 people, ask for five buses and do two loops. Coaches typically are rented at a three-hour minimum. And since most hotels are relatively close to the convention center, you can make that three-hour window stretch to your advantage by running several loops.

M&C Online, Meetings & Conventions, www.meetings-conventions.com

Tell Me Again Why Grassroots Is Important? By David E. Hebert

Perhaps one of the most difficult and vexing tasks for government affairs managers is the successful encouragement of grassroots participation. However, its success can obviously define an outcome on a legislative issue. This is obvious to you and me, but not necessarily to the folks back home.

I know all too well the familiar refrains: “Why do I have to write another letter to Congress?” or, “It won’t make any difference what I say; they won’t listen.”

The experienced Washington hand knows why participation is important. But association members, many of whom are scattered around the country, have little appreciation for the much needed contact with Congress via telephone call, e-mail, or that archaic notion of the 20th century—a handwritten letter.

What’s In It For Them?

Let’s get to the bottom line: Why should the average association member take time from his or her business or time at home watching *Seinfeld* reruns to be responsive to the Washington office? A letter to a member of Congress may butter the bread of the Washington lobbyist, but what does it do for the association member who otherwise could not be bothered—“Hey, I pay my dues, isn’t that enough?” That’s where you come in. Let’s face it: Government relations specialists (or, ahem, lobbyists) must use their considerable sales talents as they so often do with Congress. When you’re asking Congress to vote for or against a bill, you’re doing some high-profile (and hopefully highly paid) selling. The same is true for selling your association members on the importance of grassroots efforts, though your audience is quite different. The points you would raise to members of Congress to convince them to act might vary from what you would suggest to motivate your association members.

Many of us who have worked for associations try various persuasive efforts: We create awards. We recognize participants in newsletters or journals. We make buttons, pins, slogans, and banners. We solicit edicts from “on high,” convincing the association president or executive director to ask members to participate. We even resort to basic begging—which sometimes works, if done in a clever way.

The problem with these approaches is that they don’t address members’ most important question: *What’s in it for them?* Nothing is as persuasive as self-interest. No one will ultimately act unless you can explain in simple and clear terms why they should contact a member of Congress. You can explain their civic duty until you are blue in the face. You can discuss their constitutional right to “petition government” (Article III)—or explain how lobbying is guaranteed in the Constitution. But none of that matters as much as pure self-interest.

At our core, we are all lobbyists or have one working for us. Everyone lobbies. If you are a member of AAA, you have a lobbyist in Washington. If you are a senior citizen, chances are you may be a member of AARP—even if you’re just in it for the nifty discounts. Still, you have a lobbyist. Even if you’re simply trying to encourage your spouse to switch the channel on the remote control from the *ESPN Sunday Night Baseball* to *Larry King Live*, you’re engaging in lobbying.

So why is it in your members’ best interest to write that letter? You must pinpoint the specific answer to this question for your members. For the association that makes widgets, remind members that the proposed tax on widgets will have a negative effect on your association. If a certain provision in a bill will cost jobs—possibly their own—say so.

Every Letter Counts

We’re all familiar with the common refrain, “If you don’t vote, you don’t have the right to complain.” Ask the people who did not vote in Florida in the 2000 election whether their vote didn’t matter. Ask the people in Ohio in the 2004 election whether their vote mattered.

The same is true about writing letters or making phone calls to Congress. When all is said and done, if you lose an important issue, ask your association members whether they helped.

It's easy to point to the Washington lobbyist and ask why he or she didn't get what the association wanted. But did the membership act, and were the members fully engaged? Did they write that extra letter you requested? Did they send the prepared e-mail that you or your staff carefully constructed for them? Did they take the talking points you provided and make the telephone call to the legislative assistant in the congressional office? Did they create a working relationship with their member of congress or their congressional staff? If not, who is to blame? They need only look in the mirror.

So What Works Best?

For maximum effectiveness, follow these tips for persuading members to participate in grassroots efforts:

- Explain in brief terms how what is happening on the Hill could affect their livelihood. What's in it for them?
- Contact the congressional offices where you need support and inquire whether they have heard from constituents on your issue. Then double back to some of your key contacts to pass along the message.
- Talk with your association's leadership about keeping an internal tally (based upon the copies of letters to Congress you have from your members) about which state or congressional district has been contacted the most. Then see if you can post it on the members' side of your Web site. Few things work better than peer pressure or internal competition, particularly if some of your association members are vying for leadership positions.

David E. Hebert is counsel at Alston & Bird LLP, where he represents healthcare clients and also helps association members with grassroots training. He previously served as chief of staff to House Majority Whip Roy Blunt (R-Mo.). He spent 14 years working in two professional associations. E-mail: DHebert@alston.com