

# ***THE CHAPTER DISPATCH***

**September 2005**

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## **AT A GLANCE – Important Dates**

*Mark your calendars!*

**2005**

**October**

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

**Oct 31 National Board Nomination Deadline**

## NATIONAL UPDATES

### Case Management Week 2005

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

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

#### Your Chapter's CM Week Checklist:

##### October:

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

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



### 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/](http://www.cmsa.org/Membership/recruitment/).

### 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](http://www.cmsa.org)) has announced its support of the efforts of the Centers for Medicare & Medicaid Services ([CMS](http://www.cms.gov)) 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.

The **Case Management Adherence Guidelines (CMAG)** were designed to help case managers more effectively improve patient adherence to their medication regime. Researchers estimate that poor adherence to medical therapy may account for as much as \$300 billion in unnecessary healthcare expenses each year. Less than half of patients prescribed medications start and complete the prescribed therapy.

Medicare and the **Part D Prescription Drug Benefit** have brought to the forefront an increased awareness for improving patient adherence to medication regimes. The issue of medication non-adherence reaches all the healthcare treatment team. This presentation will 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. Participants will look at the full continuum of healthcare while using electronic tools to support assessment, planning, intervention, and evaluation of medication adherence strategies. CMAG-1 is a complete system of assessment through four proven tools, categorization of the individuals into motivation and knowledge categories, placement of the individual in a four-quadrant system of adherence intention and interventions, which support each quadrant. The goal is to move the individual to a higher degree of adherence intention.

**Medicare Part D:** The new Medicare prescription drug program available to all Medicare beneficiaries beginning January 1, 2006.

### SCHEDULED WORKSHOPS:

**SEMINAR 1:** [St. Louis, MO](#) - October 12, 2005 / 8:00a - 5:00p [\[more details\]](#)

The St. Louis Seminar is provided at **NO COST** to participants. Enrollment is limited. Continental breakfast & lunch will be provided. Travel, hotel & parking fees are at attendee's expense. Please click the link above for detailed information, agenda, and location/hotel information.

**SEMINAR 2:** Boston, MA - (Date and Location to be determined)

**SEMINAR 3:** Orange County, CA - (Date and Location to be determined)

### 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

### 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.

### Online Chapter Contact Information

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

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

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

### 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/>.

## LETTER FROM YOUR CPC REP



Greetings Chapter Leaders,

On August 29<sup>th</sup>, our Gulf Coast states of Louisiana, Mississippi, and Alabama were ravaged by Hurricane Katrina. Millions of people across the globe have responded with support such as food, generators, baby diapers, water, and the list goes on and on. I encourage all chapters to take active steps to support the Hurricane Katrina relief effort. No matter what you do, know that your donations are gratefully appreciated by those who have lost everything

In New England, we observed a moment of silence for our colleagues and fellow citizens at the beginning of Annual Conference and are spearheading an effort to collect personal care items for donation to either the American Red Cross or Salvation Army. All of our surplus conference totes will be added to the donation, and we have asked our exhibitors and Corporate Sponsors to donate any remaining pens, paper, and all the other handy promo items they have left over after the conference ends. Things such as the little sewing kits, hair brushes, nail clippers, etc. will all go into our chapter's donation. We are honored and privileged to be able to do this.

Case Management Week is fast approaching - October 9 – 15, 2005. Perhaps your chapter could organize a disaster relief event to coincide with one of your events? What a wonderful way to commemorate Case Management Week and at the same time demonstrate the generous caring spirit of case managers across the country.

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.

### Pending Chapters

#### **Lexington, KY**

The Bluegrass Chapter held their first formational meeting September 12, with 22 attendees. The founding group felt a lot had been accomplished by generating so much enthusiasm for the chapter formation. A show of hands was tendered to the assembly to see if they were interested in chapter development with 18 for and 4 non-committals. Attendees were asked to provide suggestions, willingness to serve as an officer or committee member and any feedback. Most everyone wrote something and turned this in prior to leaving. Everyone had positive feedback and ideas are still being tabulated the ideas. Discussion was held regarding a regular meeting place and it was decided the group would meet at different facilities to give others a chance to broaden their views.

The Lexington Herald Leader has agreed to print articles on the chapter formation in the community news. The group is busy compiling an updated listing of addresses/emails . Refreshments and door prizes were provided and good vibes were felt from the meeting.

### Official CMSA Chapters

#### **Birmingham, AL**

Carol Nesbitt, President of the Birmingham Chapter is pleased to announce an agreement with case managers in Tuscaloosa to become an Extension to the Chapter. Under the direction of acting EVP Ms. Marietta Stanton, Dean of University of Alabama's Masters in Case Management, the Chapter will have its first meeting in October. The negotiations to add Tuscaloosa as an Extension were begun by Cathy Denson, Immediate Past President and concluded with Board approval this month.

#### **Chicago, IL**

CMSA Chicago's monthly dinner meeting calendar for 2005 and 2006 has been completed to allow members ample time to plan and attend each meeting. Celebrating Case Management Week (Oct 9-15), the board is going to give out membership pins to members who attend the dinner meeting & waive the usual \$10 cost/member fee. The speaker's presentation for that day is for the case manager's self growth and development, aptly titled "SOAR to New Heights".

The chapter will encourage more current members to recruit new ones to join CMSA. (Self testimonials have stronger impact). The goal for 2005-2006 is to recruit additional 50 members. The board is confident to reach their goal once again.

#### **Detroit, MI**

At CMSA Detroit's September dinner conference, two chiropractors presented a new treatment on "Mechanical Manipulation Under Anesthesia" which was a well received by all the case managers. In honor of Case Management Week, two CMSA memberships were awarded. Attendees made donations to the Mississippi Nurses Association relief fund to assist nurses who have suffered severe losses as the result of Hurricane Katrina.

## **Raleigh, NC**

The Triangle Chapter of CMSA recently held a very successful conference. The speakers, food, vendors, and networking was a hit. The chapter also donated \$2500.00 during the conference to the Masonic Home for Children in Oxford, North Carolina. The new board for 2005-2006 was presented and the attendees had a great time. The conference for 2006 is already in the planning stages.

## **Omaha, NE**

The Nebraska CMSA Chapter is having great success with their periodic Lunch and Learn or Dinner and Learn opportunities compared to those conducted in the past. This year there four conducted (one per quarter). The board is evaluating increasing these to 6 next year. Board meetings usually take place before or after these events. With new technology and the ability to send out notices by e-mail, the chapter is having wonderful attendance at quarterly offerings. Using an online system for notifying members of upcoming events, sending them out the quarterly newsletter and allowing them to register on line for the CEU programs. This has saved on time and money and we have gotten positive responses from our members. A side benefit is a 10% boost in membership that was previously in a downturn in numbers. Vendors are lined up to give presentations for the next year or two at no cost to the chapter. The chapter still holds on the yearly Fall Forum. Last years attendance was very low but there is great hopes for a better turn out this year.

If other chapters have had a lunch and learn program fizzle out in the past, the chapter encourages them to give it another go. E-mail has been a wonderful way to get the word out and ensure the events are great educational and networking sessions.

## **Woodbridge, NJ**

NJCMSA recently held their first 2005-06 meeting in Woodbridge, hosting 9 exhibitors and 120 attendees for a dinner program entitled, "The Most Significant Case of My Entire Career". Speaker, Steven Benvenisti, Esq. featured a catastrophic case that has been on radio and TV. This night also included the induction for the 2005-2006 Board and Officers.

For the first time in NJCMSA history, the roles of President and President Elect will be continuing for a second term. The board is excited that this will allow the chapter to foster a successful volunteer campaign, combined with a new mentoring program and leadership development.

Thanks to newly appointed Executive Director, Irene Leather, a newsletter was recently emailed to membership and a second item was released entitled, "Over the Fence" which was developed as a networking newsletter. Membership is currently at 378. The chapter continues to look for new ways to increase membership attendance and bring National CMSA closer to the membership. With that mission, the board has begun reaching out to several CMSA leaders to participate in upcoming programs.

The chapter expresses their thoughts, prayers and offer of support to fellow case managers and chapters affected by Katrina. The chapter participated in a fund raising event at the September program to help in the relief efforts.

## **Chattanooga, TN**

Chattanooga Chapter CMSA held their monthly meeting August 9, 2005 with 86 attendees. The program was entitled "Insulin Pump Therapy: Improving Control and Preventing Complications".

The board is busy planning October's celebration of Case Management Week. In an effort to increase membership and make the community more aware of the dedicated work of the profession, the chapter is exploring advertising options including an advertisement in the local newspaper. The ad will also feature the names of all current members to honor them for their role in the profession during their special week. The

chapter will also have a display in the windows of a downtown corporation to make the community more aware of the organization. The primary focus for the current year is on membership and making more case managers aware of the benefits of membership. Plans are being made for a sit down lunch with a keynote speaker. Door prizes will be given to pamper and honor members.

### **Dallas, TX**

In light of the recent devastation from Katrina, the Dallas/Ft. Worth Chapter donated \$1,000.00 to the American Red Cross on behalf of sister Chapters in Louisiana, Mississippi & Alabama. The chapter encourages other CMSA Chapters to “meet it or beat it”!

DFW CMSA was well represented at the Labor Day Jerry Lewis Muscular Dystrophy Association Telethon. Five officers from the Chapter wo-manned the phones to take pledges for this worthy cause.

A new board position has been added this term to assist in meeting the Strategic Planning Committee’s objective of greater community outreach. The **Community Healthcare Liaison** will coordinate Chapter activities that will allow us to give back to the DFW community. This will include participation in such things as the MDA Telethon, AIDS ARMS Life Walk, Alzheimer’s Memory Walk & many other events.

The Fall Day Seminar, “Case Management; A Cornucopia of Possibilities”, was a great success. Over 100 attendees selected topics from three tracks, including an all day CCM Prep class. This is an annual event, sponsored by the Strategic Planning Committee, focusing on non-CMSA members.

### **Houston, TX**

The Houston/Gulf Coast Chapter held a new board and committee chairs retreat in September. The purpose of this retreat is for outgoing and incoming board members to share experiences and ideas for activities and conferences to be planned in the coming fiscal year. This meeting was casual with a continental breakfast and a sponsor catered lunch. The retreat produced a spontaneous and productive flow of ideas and plans for upcoming events.

The Houston chapter was recently exposed to a majority of the LA evacuees. They are supporting their members who are currently volunteering in the relief efforts by collecting clothing and other nonperishable items, and monetary funds to be presented to the Astrodome Collection Center as part of the monthly educational luncheons. The chapter is also donating all left over t-shirts and tote bags from the Annual Educational Conference to the Collection Center. The meeting facility (Park Plaza Reliant) is located directly across the street from the Astrodome and the Reliant Center which brings the scope of this historical disaster very uppermost in their hearts and minds.

### **Milwaukee, WI**

The Milwaukee Chapter's Past-President, Linda Smedema passed away on August 20, 2005 at the young age of 57, after a difficult battle with lung cancer. Linda has left behind her parents and two young adult daughters' who are currently in college pursuing careers in the health care industry. CMSA and the field of Case Management were very important to Linda. The chapter Board of Directors is currently working on creating a scholarship in her memory.

**Dealing with Conflict**, adapted from an article from National School Boards Association, [www.nsba.org](http://www.nsba.org).

Conflict occurs when individuals or groups are not obtaining what they need or want and are seeking their own self-interest. Sometimes the individual is not aware of the need and unconsciously starts to act out. Other times, the individual is very aware of what he or she wants and actively works at achieving the goal.

### **About conflict:**

- Conflict is inevitable;
- Conflict develops because we are dealing with people's lives, jobs, children, pride, self-concept, ego and sense of mission or purpose;
- Early indicators of conflict can be recognized;
- There are strategies for resolution that are available and DO work;
- Although inevitable, conflict can be minimized, diverted and/or resolved.

### **Beginnings of conflict:**

- Poor communication
- Seeking power
- Dissatisfaction with management style
- Weak leadership
- Lack of openness
- Change in leadership

### **Conflict indicators:**

- Body language
- Disagreements, regardless of issue
- Withholding bad news
- Surprises
- Strong public statements
- Airing disagreements through media
- Conflicts in value system
- Desire for power
- Increasing lack of respect
- Open disagreement
- Lack of candor on budget problems or other sensitive issues
- Lack of clear goals
- No discussion of progress, failure relative to goals, failure to evaluate the superintendent fairly, thoroughly or at all.

### **Conflict is destructive when it:**

- Takes attention away from other important activities
- Undermines morale or self-concept
- Polarizes people and groups, reducing cooperation
- Increases or sharpens difference
- Leads to irresponsible and harmful behavior, such as fighting, name-calling

### **Conflict is constructive when it:**

- Results in clarification of important problems and issues
- Results in solutions to problems
- Involves people in resolving issues important to them

- Causes authentic communication
- Helps release emotion, anxiety, and stress
- Builds cooperation among people through learning more about each other;
- joining in resolving the conflict
- Helps individuals develop understanding and skills

#### **Techniques for avoiding and/or resolving conflict:**

- Meet conflict head on
- Set goals
- Plan for and communicate frequently
- Be honest about concerns
- Agree to disagree - understand healthy disagreement would build better decisions
- Get individual ego out of management style
- Let your team create - people will support what they help create
- Discuss differences in values openly
- Continually stress the importance of following policy
- Communicate honestly - avoid playing "gotcha" type games
- Provide more data and information than is needed
- Develop a sound management system

#### **How does a one cause conflict with a board?**

- Not treating board members alike
- Not informing the board members of concerns
- Not providing adequate financial data or adequate information
- Using poor management practices
- Making public statements before informing the board
- Failing to be open and honest with the board
- Not providing alternatives in an objective manner
- Not adjusting to the new reality of an involved board
- Not support the board - lack of loyalty
- Springing surprises at meetings
- Having hidden agendas

#### **Elements of a strong board partnership**

- Full disclosure
- Frequent two-way communication
- Careful planning
- Informal interaction
- Periodic evaluation
- Mutual support

#### **Courageous Decision Controversies**

The controversies usually involve:

- Changes in the way "we've always done things"
- Notions of fundamental values
- Determined, articulate advocates for every side
- Inability to compromise
- Rampant rumors
- Threats of retaliation
- Board election

## **Resolving Conflict**

Searching for the causes of conflict is essential to be successful in resolving the conflict. Nine possible causes of conflict include:

- Conflict with self
- Needs or wants are not being met
- Values are being tested
- Perceptions are being questioned
- Assumptions are being made
- Knowledge is minimal
- Expectations are too high/too low
- Personality, race, or gender differences are present

### **Reaching Consensus through Collaboration**

Groups often collaborate closely in order to reach consensus or agreement. The ability to use collaboration requires the recognition of and respect for everyone's ideas, opinions, and suggestions. Consensus requires that each participant must agree on the point being discussed before it becomes a part of the decision. Not every point will meet with everyone's complete approval. Unanimity is not the goal. The goal is to have individuals accept a point of view based on logic. When individuals can understand and accept the logic of a differing point of view, you must assume you have reached consensus.

Follow these guidelines for reaching consensus:

- Avoid arguing over individual ranking or position. Present a position as logically as possible.
- Avoid "win-lose" statements. Discard the notion that someone must win.
- Avoid changing of minds only in order to avoid conflict and to achieve harmony.
- Avoid majority voting, averaging, bargaining, or coin flipping. These do not lead to consensus. Treat differences of opinion as indicative of incomplete sharing of relevant information, keep asking questions.
- Keep the attitude that holding different views is both natural and healthy to a group.
- View initial agreement as suspect. Explore the reasons underlying apparent agreement and make sure that members have willingly agreed.

### **GREAT RECRUITING IDEAS**, adapted from SHRM, [www.shrm.org](http://www.shrm.org)

1. Raffle off a free membership to someone who joins your chapter during your recruiting drive.
2. Host a special "bring a friend" meeting featuring an ice-breaker exercise, a brief chapter orientation, and refreshments. Each member must bring a friend with them to the meeting.
3. Call or e-mail visitors after they have attended a meeting. Thank them for visiting the chapter and invite them to your next event.
4. Obtain testimonials of the value of CMSA membership from current chapter members.
5. Create a bulletin board display in a prominent place and show pictures from chapter activities, membership information, and a calendar of upcoming events.
6. Announce upcoming chapter meetings in organizational or employer meetings; invite everyone to attend.
7. Ask members for names of friends and classmates who could benefit from CMSA membership. Send these people a personal invitation to attend your next event. Follow up with a phone call.
8. List your upcoming meetings in your employer and nursing college newsletters. Send e-mail reminders to all members and potential members.
9. Prepare a two-minute talk on the value of joining CMSA.
10. Set up tables displaying CMSA materials at the other healthcare fairs or student orientations.
11. Provide free refreshments at your meetings.
12. Chapter could subsidize \$5 - \$10 of the new member dues for those joining during your membership drives.
13. Ask for donations of items such as notebooks, mugs, or gift certificates from the campus bookstore and other local businesses. Offer these as incentives to new members who join during your membership drive.
14. Offer a prize to the person in your chapter who recruits the most new members.
15. Provide new attendees who visit your meeting with an information packet about your chapter and CMSA. Include a calendar of events, a list of chapter officers, and an application to join.
16. Invite a successful professional in your community to speak to your chapter on the value of joining professional associations.
17. Display copies of The Case Manager magazine, Advance For Providers and the Standards of Practice for Case Management, along with a chapter newsletter at every meeting.
18. Publicize any awards your chapter or members have won. People like to join groups that are successful.
19. Write an article for your local paper or employer newsletters on a successful chapter project or high profile speaker.

20. Create a membership committee to focus on new ways to bring in members.
21. Highlight and explain a different national membership benefit at each meeting.
22. Show member benefit slides at a meeting to demonstrate the valuable information available to members.
23. Participate in a event with another healthcare organization. Invite members of other groups to visit one of your meetings and learn more about your chapter/organization.
24. Survey current members to determine what benefits are most valuable to them. Emphasize these benefits when creating flyers or speaking to potential new members.
25. Think WIIFM- "What's In It For Me?" That's what prospective members are asking themselves. Be sure to tell them specifically how membership will benefit them.
26. Talk to lots of people about CMSA. Experts say it takes ten calls to make one sale.
27. Plan chapter social events in addition to educational activities. People like to join groups that are friendly and fun.
28. Make each prospective member feel special. Make an effort to remember names and to smile and greet people by name when you see them again around campus.
29. If you have non-members who have come to several events, give them an application and ask them to join. Some people never join simply because no one has taken an interest and encouraged them to sign up.
30. Make it easy to participate. Establish and publicize a regular meeting schedule. Provide a local contact name and phone number on all your materials and then return calls promptly!
31. Review CMSA rosters and remind expiring members to renew their memberships.
32. Offer an incentive such as a pin or mug to members who bring at least two guests to a meeting.
33. Print names of new chapter members in your newsletter and recognize them at chapter meetings. Demonstrate that your chapter is strong and growing.
34. Announce membership updates at each meeting and remind people to bring friends to the next event. Let your members know that recruiting is a top priority for the group.
35. Always speak with excitement and pride when describing your chapter.

***Enthusiasm is contagious!***

### **15 Tips for Improved Subject Lines** by *Loren McDonald*, [May 2004 Issue–Email Labs Newsletter](#)

Subject lines are one of the most important components of a successful promotional or newsletter email. This article outlines six principles and 15 tips to help you write Subject lines that produce higher open and click-through rates.

Working in tandem with the From line, the content of a Subject line is the key determinant for whether a recipient will open an email, delete it immediately, ignore it, file it for future access, report it and/or filter it as spam. The Subject line content is also a major component in the algorithm of many ISP and recipient-level spam filters. In other words, a poorly written subject lead may not only go un-opened, it may not even reach the recipient's inbox in the first place.

#### **Keep these six principles in mind as you approach writing Subject lines for your messages:**

- **Inform:** Subject lines should convey something important, timely or valuable, and should say to the recipient: "If you don't open and read this email, you'll miss out on something of real value."
- **Intrigue:** Your email is competing with 50 to 100 or more other emails for the recipients' attention. To increase the chance of having YOUR email be opened it must intrigue the recipient, the same way a well written headline does. It must stimulate some part of the recipient's brain, prompting them to open the email immediately.
- **Entrust:** Your Subject line can support or hurt your brand image. Subject lines that over promise or mislead will ultimately destroy trust with recipients, damaging your brand and driving customers away.
- **Action:** Subject lines are a major driver of click-through rates, as they "direct" recipients to pay attention to specific articles, products and information. Every email you send should have an overt or implied strategy behind it. You hope that specific products are purchased over others or that recipients read a specific article and then visit your Web site seeking additional information. Subject lines should reflect your goals and help direct recipients to take the desired action.
- **Empathy:** While your emails may be distributed to thousands or millions of recipients, they are being received by individuals. Subject lines must recognize this and "speak" to the needs and interests of your recipients as individual customers, readers or prospects.
- **Togetherness (Subject Lines and From Lines Must Work Together):** Largely because of the dramatic increase in spam email in the last year or two, recipients increasingly look at a combination of the From and Subject lines to determine whether it is from a trusted source. As a result, the job of a Subject line now must not only entice someone to open an email, it must discourage the recipient from deleting it as an unwanted email.

#### **Following are 15 tips for writing better Subject lines:**

1. **Segment/Personalize:** Personalizing Subject lines does not mean putting someone's first name in the Subject line, followed by generic information such as, "Loren, Your Personalized May Newsletter." If you are segmenting your list in any way, then each segment should likely receive appropriate and different Subject lines. Even if you aren't creating separate versions of your email, if you have relevant information on segments of your subscribers, tailoring the Subject line to their interests should improve open and click-through rates.
2. **"Brand" Your Subject Line - {Newsletter or Company Name}:** A practice that has really taken hold in the last year or two is including the name of your company or newsletter/promotion in the Subject line, usually at the beginning and enclosed in brackets. An example would be: {Intevation Report} 15 Tips for Better Subject Lines. This practice reinforces the From line, ensuring recipients that it's coming from a trusted source.
3. **Use a Consistent Style:** While Subject lines should obviously be different each time, From and Subject lines should become immediately trusted and recognized by recipients. After testing and learning what style works best for your recipients, stick with that approach, whether humorous, provocative, incentive-based, tip oriented, etc.
4. **Have Someone Else Write, Edit or Review Subject Lines:** Have someone other than the person who creates the email itself write, edit or at least review the Subject line. Use this person like a newspaper headline writer and have them push your copy to another level of relevance and creativity.

**5. Send Subject Lines to Yourself:** One of the best gauges of the strength of a Subject line is to send sample emails with different Subject lines to yourself. What kind of response do they warrant when they arrive in your inbox – “gotta open it immediately”, “delete/ignore” or “read it later”?

**6. Use Different Versions for AOL Subscribers:** If you have a high number of AOL subscribers, we generally recommend that you create different versions of your emails. Use shorter and more conservative Subject lines and include your company or newsletter name, as the AOL client displays the From email address in the inbox, not the From name.

**7. “Listen” – Monitor Your Inbox for Ideas:** The greatest inspiration for writing Subject lines may come from monitoring your own inbox. What type of Subject lines intrigue your interest and motivate you to open them immediately? Which kind do you not delete or file, but generally never go back and open?

**8. Track Which Subject Line Types Work Best for You:** Track and analyze the type of Subject lines that produce the best open and click-through rates. Open rates are the most obvious measure of the success of Subject lines, but click-through rates are also an important measure of how well the Subject line drove recipients to take action and click on a specific link or links. Categorize and assess your Subject lines by various approaches you may have used or tested such as long versus short, use of certain words (“\$ off” versus “% off”, “tips” versus “steps”, etc.)

**9. Think Context – “Google Apologizes”:** Put yourself in the mind of your subscribers. What are they thinking about, what’s in the news, what events and holidays are coming up? One of the best Subject lines I’ve seen in years was one that was appeared in the December 2003 newsletter from WebProNews. The Subject line was simply “Google Apologizes.” The newsletter had been covering developments in search engine marketing and optimization, particularly the changes in Google’s search ranking algorithm that sent many Webmasters and search engine optimizers into anywhere from a tizzy to panic or outrage. In that context, the Subject line “Google Apologizes” was brilliant. It was clearly at the top of readers’ minds at that moment, it was intriguing and it portended the answer to a key question – what happened with Google’s search rankings?

**10. Know What Might Get Filtered:** It’s important to be provocative but if you cross the line your Subject line may trigger a spam filter. Always use a spam content checker if your email technology has this feature. Additionally, send proof messages to your AOL, Yahoo, Hotmail and other test accounts to ensure that your content doesn’t trigger a content filter.


**11. Test Length – Short Versus Long:** Analysis of data from our client base suggests that Subject lines of less than 50 characters achieve higher open rates than those of 50 or more characters. That being said, there is much debate about shorter versus longer Subject lines that encompass more information for recipients. Test various styles and lengths and see what generates the best results with your recipients. But in general don’t stress having a longer Subject line, but do check to see how your Subject line appears in various email clients to ensure that key information is not cut off awkwardly. A few years ago I wrote a Subject line for a client that included “...by December 21” in the Subject line. The email, to be distributed in early December, appeared as “...by December 2” in the AOL inbox. Fortunately I tested it in advance and changed the Subject line for AOL recipients.

**12. Focus – Avoid the Generic and Boring:** Don’t be afraid to be very specific in Subject lines. Many marketers use broad and generic Subject lines, such as “May 2004 Newsletter” because they fear that a specific Subject line may not resonate with all readers. First, remember that generally only 25 to 50 percent of your recipients are opening your emails to begin with. Secondly, your Subject line should be targeted to each segment (if you are segmenting your list) or be relevant to the vast majority of recipients. It’s your job to figure out what topics, offers or products are of most interest to majority of your recipients and then deliver that information on an on-going basis. As such, your Subject line should be as narrow as possible to generate interest and action from a majority of recipients.

**13. Write It Early:** Perhaps the most common mistake marketers make is waiting till the last minute to write their Subject lines. Don’t. Start thinking about the Subject line shortly after your previous email goes out and the results start to pour in. While everything is still fresh, jot down potential Subject lines for your next email. As you pull together your email content, continue drafting up various Subject lines allowing you to just tweak or decide which version to use - rather than starting from scratch at the last minute.

14. **Push the Envelope (or Inbox as the case may be):** Don't be afraid to try Subject lines that are more aggressive, creative, tantalizing or specific than you're currently using. Try some new styles and test them via split tests. Monitor the results across all metrics open rates, click-through rates, spam complaints, bounce rates and unsubscribes to make sure that a bump in your open rate didn't lead to an increase in unsubscribes, bounces and spam complaints.

15. **Test, Test and Test:** Like every facet of email marketing, the most certain way to know if something is working is to test it. Subject lines are, in fact, the easiest component of email marketing to test. Split your list in half, thirds or even quarters and test a different type of Subject line in each split. A key is to test types of Subject lines so that you can carry the learning into future distributions. Secondly, you should test at least a few times to make sure your findings were correct.



### HOW TO FIND THE STATUS OF A BILL

To influence legislation, you, of course, need to find out “where” in the process the bill is. At any point in time, you need to find out “what is the status of my bill?” These are tips for doing so:

1. **KNOW THE BILL NUMBER.** This is also your tracking number. Then, get a copy of the bill, once it is printed.
2. **CALL THE CLERK.** With the bill number, the House or Senate Clerk can usually quickly tell you where in the process the bill is, or what committee the bill is in and when the bill was referred to that committee. That Clerk can also often be helpful in explaining what that means.
3. **CALL THE SPONSOR.** The sponsor, or more likely a staff person for the sponsor, often can be relied on to closely follow the progress of their own bill. They can also tell you whether the bill is in good shape or bad, and what, if anything, might need to be done.
4. **CALL THE COMMITTEE.** The subject-matter committee that originally got the bill usually follows all of their bills, especially if they gave it a “favorable” recommendation. So, find the appropriate staff person who is handling your bill and keep in touch with him.
5. **RESEARCH IT YOURSELF.** Go to the State House or Capitol Building yourself, if you can. Visit the House and Senate Clerk's office and see how you can look it up yourself. Most legislatures have computerized their Clerks' offices, so you may be able to research a computer printout or look it up yourself.
6. **GET A "PRINTOUT".** If you really want to understand and keep track of what has happened to your bill, a Clerk's office that is computerized can sometimes give you a hard-copy printout of everything that happened to your bill since it was filed. Looking through that record can help you understand how well the bill is doing, and help you understand how the process works.
7. **CALL SUPPORTERS OF THE BILL.** Do this especially if you also support the bill; an organization that supports a bill usually will be following it closely and trying to get it passed with as few amendments as possible. Find a contact person at this organization and keep in touch. They should be able to quickly tell you the status of the bill, how well it is doing, and what you could do, if anything, to help.
8. **CALL OPPONENTS OF THE BILL.** Especially if you oppose the bill also; an organization that opposes a bill usually will be following it closely and trying to get it defeated or will try to amend the bill to eviscerate it. Find a contact person at this organization and keep in touch. They should be able to tell you quickly the status of the bill, how well it is doing, and what you could do, if anything to help.
9. **DON'T BELIEVE EVERYTHING YOU READ.** Newspaper reporters often have a poor understanding of the legislative process. News articles rarely give bill numbers, the precise status of the bill, or any of the information you can get yourself. Newspapers can be a good source of some information but, in most cases, it's not what you really need to know.
10. **KEEP AT IT.** Things can happen very fast in legislatures. Of course, sometimes they can drag out for months. Check on your bill on a regular basis and increase your checks when it looks like something is going to happen. The more calls you make, the more you will be able to understand the process and what is happening to your bill.