

THE CHAPTER DISPATCH

February 2006

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AT A GLANCE – Important Dates

2006 CALENDAR

Feb 1	Spring MEMBER-GET-A-MEMBER CAMPAIGN begins
Feb 6	ONLINE POLL OPENS for National Board Elections
Mar 15	CPC ELECTION OPENS – Presidents only
Mar 20	National Board Election Closes
Apr 15	Deadline-Award of Excellence in Adherence Management (AEAM) nominations
Apr 30	CHAPTER INNOVATION AWARD Entry Deadline
Apr 30	Spring MEMBER-GET-A-MEMBER CAMPAIGN closes
Jun 13	CHAPTER LEADERSHIP WORKSHOP, Grapevine, TX
Jun 14	CHAPTER PRESIDENTS' COUNCIL meeting, Grapevine, TX
Oct 8	National Case Management Week, Oct 8-14

NATIONAL UPDATES

Award for Excellence in Adherence Management (AEAM) 2006 Award Entry Deadline April 15, 2006

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

Applicants must complete the following activities:

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

The award decision will be made by an advisory committee appointed by CMSA. The AEAM award winner will receive official award ceremony recognition at CMSA's Annual Conference June 13-17, 2006, at the Gaylord Texan™ Resort & Convention Center on Lake Grapevine in Fort Worth/Grapevine, TX. **Deadline for application for CMSA's 2006 AEAM Award is April 15, 2006.** All essays must be submitted electronically and become CMSA property. Contact CMSA for rules and application details.

Visit www.cmsa.org under National Awards for more information.

CMSA Website Updates

CMSA REVAMPS WEBSITE

You may have noticed upon logging on to www.cmsa.org that things are looking different. The CMSA website underwent a full redesign as of January to become even more user friendly, to supply even more helpful content and features, and to allow more thorough updating of member information. One of the first changes you'll notice is that you'll be asked to establish an Online Member Profile upon logging onto the website. This one-time request is especially important for members and will eventually make it simple and easy to modify your personal contact and demographic information.

Other updates implemented for easier navigation include a full "Search" function, expanded "Drop-Down Menu" options, and a cleaner, more streamlined design. If you haven't visited the CMSA website in a while, log on today and take a tour. Go to www.cmsa.org and see the newly redesigned website. We hope you'll like the easier-to-use format. Many other features and benefits are in process and will be added soon!

YOUR CMSA WEB PROFILE

In order to serve our member better, we've designed a quick and easy-to-complete web profile page. The information entered here will allow CMSA to maintain a more current and complete database of its member and website visitors' information, including work setting, expertise, and certifications held. Please take a few minutes to complete the information (see the "Create Web Profile" link on the home page). **Note:** when setting up your profile, to make sure you enter your *First Name*, *Last Name*, and *Member Number* in

the appropriate fields as this will link your new profile to your existing CMSA membership records if you are a member. You will also customize your Username and Password for logging into the website.

Most importantly, the addition of a profile page moves CMSA one step closer to a fully customized web portal for personal content customization. Case management encompasses such a broad spectrum of professionals, the industry body of knowledge is rapidly growing to an immense volume. Consequently, CMSA is aggressively moving towards a portal concept. We envision a day, in the not too distant future, when a case manager will be able to personalize, filter and view content of personal interest.

EDUCATIONAL RESOURCE LIBRARY

Just as CMSA members focus on the individual needs of their patients, CMSA is making a focused effort to target programs that will make a real difference to case managers. As we watch our industry morph and change before our eyes, we can state, with confidence, that case management has matured to a place where a one-level approach to education is no longer practical. Every program in the Educational Resource Library will be customized to three levels: **Basic, Intermediate and Advanced**

Regardless of how much educational material CM employers provide their case managers, we firmly believe CMSA's Educational Resource Library will soon become your one-stop-shop for case management education, resources, tools and skills development.

SUPPLEMENTAL EDUCATIONAL PROGRAMS

In addition to CMSA's Educational Resource Library, CMSA has partnered with other organizations to bring to you other resources for case management education. Below are currently programs available through the CMSA website under the Education tab:

[Adherence Starts with Knowledge \(ASK\)](#) - Adherence Starts with Knowledge is a survey-based program Designed to identify barriers to medication adherence and links to appropriate education materials. ASKSM can help managers identify patients/members who have barriers to medication adherence and to provide access to educational interventions that assist them in meeting their health objectives. *Offered by GlaxoSmithKline (GSK).*

[Athena Forum](#) - Representing a new brand of text-based clinical education available on the Internet, AthenaForum.com is accredited CE education with curriculum specifically designed using recent Needs Assessment research collected from a variety of 400 RN Case Managers nationwide. All CCM certificates are subsequently awarded by the Commission for Case Manager Certification (CCMC). *Offered by Business Media Associates, Inc (BMA).*

[Essentials of Case Management](#) - The Essentials of Case Management 17 hour CE Distant Learning Course has been an acclaimed national course presented throughout the US and abroad since 1994. It has assisted thousands of healthcare professionals at many levels including those who are new to the industry, exploring more efficient models of delivery across the care continuum, searching for effective case management tools, techniques, and best practices, and looking for case management certification and/or accreditation. *Offered by Professional Resources in Management Education, Inc (PRIME).*

[Essential Connections](#)SM - Help motivate patients with chronic conditions to make challenging lifestyle changes. Essential ConnectionsSM offers an array of easy-to-use communications skills and patient self-care tools to motivate behavior change and improve adherence in patients with chronic conditions. *Offered by GlaxoSmithKline (GSK).*

[MCBiologics](#) - Biologic therapies have produced significant advantages in cancer treatment and patient care; however, these advantages create noteworthy cost considerations for the managed care environment. This learning module will have three separate tracks designed to address the specific concerns of the Medical Director, Pharmacy Director, and Case Manager audiences. *Offered by Genentech, Inc.*

[KCI Web Based Learning Modules](#) - KCI believes education is key to promoting quality of care. Providing an established resource reflects a continued commitment to the healthcare community. KCI's Continuing Education Provider Unit currently offers web-based, accredited education courses on Wound Care, Bariatrics, and Critical Care. *Offered by KCI.*

CMSA Pins

CMSA MEMBER PIN

CMSA presents a new look for the CMSA Member Pin! You'll be proud to sport this new lapel pin in front of colleagues, patients and other CMSA members.



CASE MANAGER RECOGNITION PIN

Back by popular demand, this recognition pin introduced with the 2005 Case Management Week products is once again available! The pin says it all "*Case Managers, The Vital Piece*". This pin is suitable for member and non-member case managers in recognition of an achievement or just because you are proud of being a case manager.



Pins can be ordered at www.cmsa.org under Products. Or for chapter bulk rates, download an order form, go to www.cmsa.org, under Membership, then Chapter Resources.

Member-Get-a-Member Campaign

Be a Part of CMSA's Spring Member Round-Up, February 1 – April 30, 2006

Round up your case/care management coworkers, friends, and colleagues and recruit new members for CMSA's Spring Member-Get-a-Member campaign. The 2006 campaign theme is "One Purpose, Many Paths," reflecting the industry's strong focus on the varied strategies within case/care management to improve the quality and cost efficiency of healthcare. When your recruits join CMSA, you receive the following for each new member:

- **FIRST RECRUIT:** A CMSA Member pin
- **EACH RECRUIT:** A \$5 CMSA coupon for each person recruited
- **FIVE OR MORE RECRUITS:** One free year of CMSA membership
- **TOP RECRUITER:** A complimentary Texas 2006 conference registration

Be sure to include your name, city, and state on all applications before dispersing. **Special Member-Get-a-Member Applications are available from the CMSA website** – link at the bottom of the homepage! Include information on local chapter activity and contacts in your packets. CMSA tracks the new members for each Recruiter from the area on the special Individual Membership Application where the Recruiter adds their name, city and state. This will be the only way National Office will know that the member was recruited by you. Recruiters will be highlighted on the website, in *The Chapter Dispatch*, in *The Case Report*, and more.

CONTEST RULES

Be sure to visit www.cmsa.org, at the bottom of the home page, for complete contest rules and helpful suggestions. Only current CMSA members may participate. All applications must be received with payment by April 30, 2006. Applications must be endorsed with recruiter's name and/or membership number to qualify.

- You must be a current CMSA member to participate in the campaign and to be eligible for prizes.
- To receive credit, your name, city, and state must be listed on the upper right hand corner of the recruited member's application. Recruiters will only be awarded credit for completed and paid memberships.
- Regular membership applications and online applications are acceptable. Write your name, city and state on the application to get credit for the new member.

WINNING CMSA RECRUITERS

The growth of CMSA over the past years can be attributed to the work of our chapters and the individual members who have worked hard to share the word about CMSA. Join the spotlight with these top CMSA Recruiters who continually strive to help promote CMSA!

SPRING 2004: Rick Klingler, *Spokane, WA*

FALL 2004: Adrienne Hanrahan, *Chicago, IL*

SPRING 2005: Diane Herdade, *Detroit, MI*

FALL 2005: Jim Sepeda, *San Jose, CA*

CHAPTER REMINDERS

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 were emailed to all Chapter Presidents on January 4, 2006. If you did not receive yours, please contact mlee@acminet.com for a copy. See your packet for eligibility criteria or contact the National Office. **Nominations must be postmarked by March 1, 2006.** You may also contact the current CPC Rep, Teri Treiger, for more details of this position. Teri can be reached at teri.treiger@comcast.net.

Local Chapter Award Competition

Think about the programs, publications, and other creative efforts your Chapter produced this year then submit them in **CMSA's 2006 Chapter Excellence and Innovation Awards Program**.

Initiated in 1999, the awards program is designed to bring recognition and reward each year to the CMSA Chapters that make outstanding innovations. The awards help spotlight Chapters that thrive amidst competition for membership and programming, as well as serve as recognition for the efforts made by hardworking CMSA volunteers!

Chapters May Compete in the Following Five Categories:

- 1) **Chapter Conference** - Showcases the chapter that best contributes to the development of creative, informative, relevant, and innovative educational conference programming.
- 2) **Educational Programming** - Pays tribute to the chapter offering outstanding educational programming not related to a conference.
- 3) **Internet Technology** - Awards the best use of Internet technology through development of a local Website, listserv, or similar online program (project must utilize the Internet to qualify).
- 4) **Membership Development** - Recognizes design, communication, implementation, and evaluation of a membership campaign-like program to promote chapter growth.
- 5) **Print Materials** - Spotlights the best one-time or monthly print publication by a local chapter, including newsletters, conference or membership related brochures, manuals, flyers, etc...

ENTRIES ARE JUDGED WITH THE FOLLOWING CRITERIA:

- Success of meeting goals set forth by chapter
- Professionalism & organization of materials
- Creativity & originality
- Other criteria specific to category

All entries are judged by individuals outside CMSA according to the criteria above. Winning chapters will be recognized at Dallas/Ft Worth 2006 Annual Conference, in *The Case Report* and *The Chapter Dispatch*, as well as on CMSA's website. **Hurry and enter. Entries must be received by April 30.** For chapter award entry forms and the list of previous recipients, visit www.cmsa.org/professional/awards/ceia/.

Officer Updates

Make sure your chapter has updated their Officers with CMSA for the Leadership database. This will ensure that communications are shared with the proper individuals, including monthly reports, newsletters, updates, chapter dues, etc.... This information will also help ensure proper chapter contact information is listed on CMSA's website & calendar of events so that individuals may contact your chapter about upcoming events, exhibit or sponsorship opportunities, etc.... In addition, chapter presidents', vice-presidents', and president-elects' have an opportunity to network on CMSA's Chapter Presidents' Council (CPC) forum, providing their officer positions are up to date with CMSA. Contact Michele Lee in Member/Chapter Services to determine if your chapter is up-to-date!

2006 National Case Management Week!

Make plans now for *National Case Management Week 2006!* "One Purpose, Many Paths" is the theme, so begin plans to celebrate the week of October 8 – 14 to help promote case management and bring attention to the contributions that case managers make to the healthcare industry.

Watch for details on what CM Week products will be available and when they go on sale. Then, place your order early to ensure availability in time for your CM Week celebration.

Also, stay tuned to the official National CM Week website at www.cmsa.org for updates and information on these topics and more:

- Online tools, such as, flyers, advertising, poster graphics, and guides
- Ideas for planning an event
- How to recognize the case managers in your Chapter or organization
- How to design your own local National Case Management Week promotional piece
- What other organizations support National Case Management Week



LETTER FROM YOUR CPC REP

Greetings everyone,

In a recent email message, Cynthia D'Amour posed questions relating to chapter preparedness in the area of member volunteerism. If your chapter does not have a plan to follow-up when a member offers to help out behind the scenes, the time to put something formal in place is now.



When a member offers to help, it usually indicates s/he has already given thought as to what they might be able to do and decided they can afford to give up some of their own time. Don't let the opportunity pass by! New volunteers are often future chapter leaders. We must make concerted efforts to encourage members to grow professionally through increase involvement at both chapter and national levels.

We all live with the scarcity of resources. Even chapters with very active membership recognize that you can never have enough help behind the scenes. Take a moment at your next Board of Director's meeting to ensure communication channels are open and that each and every board member knows who and how to connect new volunteers to the 'right' person in order to guarantee the chapter's best resource, your members, are not lost in the shuffle.

Consider more than simply passing along someone's name as an 'interested party'. How about designating a board member to be responsible for making contact with volunteers to find out what they are interested in doing, their areas of strength or special talents, etc. People can then be matched with activities of interest to them.

The closing thought of this column was that there is no right way to do this. Just having a clear process established in your chapter is the most important first step.

Best wishes,

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 Membership link choose Local Chapter.

Official CMSA Chapters

Dade/Broward County, FL

South Florida Case Management Network (SFCMN) is participating in this year's *MS Walk* in Ft. Lauderdale, FL. SFCMN has committed to raising \$7,000 for MS. They are putting together a team to walk 6.2 miles for this great cause. Recently, they participated in an all day workshop at the Signature Grande and had a table to solicit for membership with the many healthcare professionals that attended. In 2005, Adrienne Franco, President-Elect of SFCMN was presented with an award for the Healthcare Professional Award 2005 from the South Florida Chapter of the National MS Society.

Atlanta, GA

Recruitment and retaining membership is one of the goals for this year's CMSG-Atlanta Board of Directors. They have made a conscious effort to recognize visitors and new members at each bi-monthly meeting this year. Each new member is personally invited by the various chairs to join an annual conference subcommittee as a way to get to know some of the more active members and "get involved". Membership numbers and recruitment efforts are discussed with the general membership at each meeting. Visitors are deferred from their initial meeting fee. If they do not join, subsequent meetings have a dinner fee of \$20.00. There is no charge if they join. As a result, there has been a significant increase in interest from visitors. The Board has also begun sending a personal hand written note to each member listed on the "expiring" list received from CMSA each month. They hope to jar some memories in reactivating membership with a personal touch. However, that being said, they also want more than just "members", they are asking for a commitment from each member to consider volunteering for a subcommittee. It seems to be working!!!!

Chicago, IL

CMSA Chicago has been focused on their annual conference, *The Beat Goes On -The Heartbeat of Case Management*. It is a day long conference held at Drury Lane in OakBrook. It is a day filled with networking, education and fun. To learn more about the conference visit www.CMSAChicago.org. They are also taking applications for their local Case Manager of the Year award. Another area of exploration is to offer a CCM scholarship offering to pay the tuition for two individuals each year. The Board is currently seeking feedback from the local members. The monthly meeting attendance remains strong. The chapter has been hosting them in the evening, getting educational sponsors and offering dinner. It seems to be a winning strategy for the chapter.

Detroit, MI

Detroit has had it going on! They kicked off the New Year with a Beach Bash in January to thank current members and to encourage new members to experience why it's important to belong to CMSA, whether in Detroit or around the nation. Everyone enjoyed socializing with each other without any business discussion! The food was extraordinary with 2 chocolate (dark and milk) fountains. A good time was had by all. The chapter also added 12 new potential members to the ranks and now have 406 members as of this January 2006.

CMSA Detroit Chapter has been extremely busy in planning their upcoming conferences. They were able to sponsor four Dinner conferences a year. The kick-off conference will be all day long on March 31.

The conference will feature the Physician's group from Michigan Pain Specialists in Ann Arbor, MI. They will bring over 30 years of combined experience in Interventional Pain Medicine in which they have created a true Multidisciplinary Pain Facility. The Detroit chapter is committed to continuing education opportunities for the members and with this conference it should help to meet the Pain CE requirement. Other conferences scheduled include May, September and November.

St. Louis, MO

On February 2, the Case Management Society of St. Louis (CMSS) hosted their first evening educational seminar sponsored totally by Fourroux Orthotics and Prosthetics. The educational dinner was attended by 40 members and non-members, some of which had never attended a CMSS meeting in the past. The topic was *Advancements in Prosthetics Today* with the speakers being two amputees that have received the new technology from Fourroux. CCM credits were provided. The evening ended with many case managers staying at the restaurant to network and socialize.

Woodbridge, NJ

December was certainly a time for celebrating for the New Jersey Chapter. Not only were the holidays fast upon them, they are celebrating the 10th birthday of the New Jersey chapter. On hand to celebrate was Susan Rogers, CMSA current National President. Susan delivered a very interesting presentation on *Improving Medication Adherence and Health Outcomes in Patients with Osteoporosis* to an audience of 139. Just one month previous to the December meeting, Connie Commander, National President-Elect, paid the chapter a visit and to another large group, presented a timely talk on the the *Medicare Drug Improvement and Modernization Act*. For the members, many of whom have never been to a CMSA National Conference, this was a chance to meet CMSA leaders close up and personal. Susan was presented with a NJCMSA "Diva" Doll...fast becoming a NJCMSA tradition.

A heart-warming highlight of the December celebration and program was seeing everyone arrive toting a teddy bear. They joined "Operation Teddy bear," an organization collecting the precious bears for the tiniest of victims of Hurricane Katrina and Rita in LA, AL and MS. At the end of the night, they packed 139 "teddies" into boxes and off they went. A lot of case managers were reluctant to part with their teddy bears...grown men and women....total softies! They are using their winter hiatus to plan their upcoming 10th Annual Conference to be held on April 19, 2006 at the Sheraton Hotel at Raritan Center in Edison, NJ. The chapter is anticipating 250-300 case managers to be on hand. The theme for the Tenth Annual Conference is F.I.S.H. or *Fresh Ideas: Spring Happening... Thinking Upstream...Thinking Outside the Bowl*.

Memphis, TN

The Case Management Society Chapter of Memphis Midsouth is very excited to be hosting their first annual educational conference and vendor fair. The theme is *Travel the World of Healthcare* with promotions such as "To get away and indulge yourself with knowledge in health care, plan your trip with CMSA Memphis Chapter Travel Agency. You will explore the exotic beaches of rehabilitation to the adventurous mountains of disease management. You will discover modern technology in home care and traipse through the rain forest of legal issues in case management." Guest speakers include Nancy Skinner, Past CMSA President and a chance to earn 5.0 CE's.

Personal Time Management for Busy Managers by Gerard M Blair

Time passes, quickly. This article looks at the basics of Personal Time Management and describes how the Manager (leader) can assume control of this basic resource.

The "Eff" words

The three "Eff" words are [*concise OED*]:

- **Effective** - having a definite or desired effect
- **Efficient** - productive with minimum waste or effort
- **Effortless** - seemingly without effort; natural, easy

Personal Time Management is about winning the "Eff" words: making them apply to you and your daily routines.

What is Personal Time Management?

Personal Time Management is about controlling the use of your most valuable (and undervalued) resource. Consider these two questions: what would happen if you spent company money with as few safeguards as you spend company time, when was the last time *you* scheduled a review of your time allocation?

The absence of Personal Time Management is characterized by last minute rushes to meet dead-lines, meetings which are either double booked or achieve nothing, days which seem somehow to slip unproductively by, crises which loom unexpected from nowhere. This sort of environment leads to inordinate stress and degradation of performance: it must be stopped.

Poor time management is often a symptom of over confidence: techniques which used to work with small projects and workloads are simply reused with large ones. But inefficiencies which were insignificant in the small role are ludicrous in the large. You can not drive a motor bike like a bicycle, nor can you manage a supermarket-chain like a market stall. The demands, the problems and the payoffs for increased efficiency are all larger as your responsibility grows; you must learn to apply proper techniques or be bettered by those who do. Possibly, the reason Time Management is poorly practiced is that it so seldom forms a measured part of appraisal and performance review; what many fail to foresee, however, is how intimately it is connected to aspects which do.

Personal Time Management has many facets. Most leaders recognize a few, but few recognize them all. There is the simple concept of keeping a well ordered diary and the related idea of planned activity. But beyond these, it is a tool for the systematic ordering of your influence on events, it underpins many other managerial skills such as Effective Delegation and Project Planning.

Personal Time Management is a set of tools which allow you to:

- eliminate wastage
- be prepared for meetings
- refuse excessive workloads
- monitor project progress
- allocate resource (time) appropriate to a task's importance
- ensure that long term projects are not neglected
- plan each day efficiently
- plan each week effectively
- and to do so simply with a little self-discipline.

Since Personal Time Management is a management process just like any other, it must be planned, monitored and regularly reviewed. In the following sections, we will examine the basic methods and functions of Personal Time Management. Since true understanding depends upon experience, you will be asked to take part by looking at aspects of your own work. If you do not have time to this right now - ask yourself: why not?

[Click here for more details on managing your time effectively.](#)

Welcoming and Involving New Members

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

The following steps are keys to that success:

Time your meetings so new members can attend:

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

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

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

Establish a "Designated Host" System:

- a) Have you ever attended a meeting in which you didn't know anyone, and watched the old members of the group chat happily away throughout the meeting while you tried to blend into the wallpaper?
- b) Were you anxious to go back for a second meeting?
- c) The purpose of the designated host is to "make sure" anyone attending a meeting for the first time has an enjoyable experience.
 - Designated hosts are positioned at the door to watch for new faces.
 - When a new member arrives, the host escorts them throughout the meeting, introducing them to everyone, explaining what's going on, translating when appropriate, etc.
 - By the end of the meeting, the host should know as much as possible about the interests and background of the new member so a suitable position can be assigned quickly.
 - Past presidents make excellent designated hosts.

Create a mentor system:

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

Plan a new member project:

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

PROMOTING YOUR STRATEGIC PLANNING DAY

Do your key volunteer leaders understand the value of strategic planning? Are you afraid that you and two others may be the only ones who show up if you plan a leader retreat? A good communications campaign can make all the difference.

Begin by stirring dialog to help the group discover the importance of setting goals together. One way is to simply ask three straight-forward questions.

Why develop goals as a group rather than have our leader dictate our goals?

To build consensus. To provide the group ownership. Etc...

Why write down the goals?

To help us be more specific. To be certain everyone heard and agreed on the same thing. Etc.

Why track the progress of the written goals?

So the goals don't end up in a folder that collects dust on a shelf. Etc.

Once you have initial "buy-in" for the need to set goals as a united body, pick a retreat date several months out. Doing so will allow volunteers to schedule their other activities around your planning retreat. After your date is confirmed, plan a campaign to communicate excitement and stir anticipation for your big event.

Here's what one nonprofit is doing in preparation for a strategic planning day. (Each of the following "touches" has/will include a mark-your-calendars-because-you-won't-want-to-miss-this-awesome-event message!)

- ~ 90 days out – Volunteer leader emailed a fun, upbeat message to other board leaders asking them to complete a board self-evaluation. The email explained the online survey results would help determine perceived organizational and board strengths and weaknesses in preparation for the upcoming strategic planning date.
- ~ 80 days out – Another "high-energy" email reminder was sent prompting board members to complete the survey and to mark their calendars for the "Strategic Planning Event of the Year!"
- ~ 75 days out – Volunteer leader emailed a flyer promoting the planning event. The flyer had a "flavor of fun" and included a high-level look at the tentative agenda.
- ~ 60 days out - Volunteer leader enthusiastically announced and promoted the strategic planning date during regular board meeting.
- ~ 30 days out – Covenant emailed another upbeat reminder with a promise of a "fun and productive day". The reminder included a copy of the agenda flyer previously distributed.
- ~ 14 days out - Volunteer leader will place calls to board members and ask, "Can you give me a quote for why everyone's presence is important at the upcoming strategic planning get-together? I'm calling all the board members to ask. I plan to compile the quotes in a document that I will distribute to all board members with a reminder of our big event."
- ~ 7 days out – Volunteer leader will distribute final reminder about the strategic planning date ...with all of the previously collected quotes from fellow board members.

Draft Points for Case Management Message to Legislators

PROBLEM:

Legislators are searching for positive approaches to address healthcare issues and to improve health outcomes.

Primary problems

- Care is increasingly specialized and fragmented
- Patient safety is at issue
- Costs of care are spiraling out of control
- An even larger group of Americans is aging and presenting escalating medically complex health care needs
- Care is chaotic and inefficient

SOLUTION:

- ❑ **Case management** provides involvement, education, and empowerment to patients and families. In addition, case management **enhances** care coordination, improves patient adherence to recommended treatment, improves quality and decreases fragmentation.
- ❑ **“Nurse Case Manager: The highly trained professional, often the glue for the team, has the most regular contact with us and our families and helps coordinate and integrate the care that occurs both inside the team and outside of it from other teams and individual professionals. The case manager is the traffic controller, dispatcher, navigator, and often the advisor, counselor and comforter as well.”** Dr. David Lawrence, Chairman Emeritus, Kaiser Permanente
- ❑ **Case Managers** coordinate care at the point of healthcare decision-making and bring patients and their families, payers, and providers of care together to facilitate treatment decisions in the patient’s best interest. Increasingly recognized by the public and private healthcare systems, credentialing organizations and academic institutions as critical to successful clinical and financial healthcare outcomes and patient satisfaction, case managers work primarily with complex and chronic care management focusing simultaneously on achieving health and maintaining wellness and containing costs.
- ❑ **Involvement of case managers in programs of care will decrease fragmentation, improve clinical and financial outcomes of care, increase consumer satisfaction.**

Founded in 1990, CMSA is a multidisciplinary professional association with nurse, social worker, therapy, and physician members working collaboratively with complex and chronic care coordination. With over 16,000 members/subscribers and 70 chapters in the United States, CMSA expands its outreach internationally with member’s countries and territories including Argentina, Australia, Bahamas, Bermuda, Canada, England, Hong Kong, Ireland, Japan, New Zealand, Puerto Rico, Singapore, and the United Kingdom.