

THE CHAPTER DISPATCH

July 2006

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**

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AT A GLANCE – Important Dates

2006 CALENDAR

- | | |
|----------------|--|
| Sept 26 | CMSA Pre-Conference Workshop at IHPM Conf – Las Vegas, NV |
| Oct 8 | National Case Management Week, Oct 8-14 |

NATIONAL UPDATES

INTEGRATING HEALTH & PRODUCTIVITY MANAGEMENT

CMSA is hosting a workshop September 26, 2006 in Henderson, Nevada entitled “Trends and Tools for Health and Adherence Management.”

The focus of the workshop is to provide case managers, human resource personnel, disability managers, medical directors, occupational health nurses and management executives information and tools for bringing health and adherence programs into the workplace. There will also be sections focusing on how case managers can demonstrate the value created by health and wellness programs and how to calculate ROI. The workshop will be held at the beautiful Hyatt Regency Lake Las Vegas and speakers will include though leaders in wellness coaching, employee health management and adherence training. (The workshop is being held in conjunction with the Institute for Health and Productivity Management’s (IHPM) annual conference, September 27 – 29).



This CMSA sponsored workshop will guide you in bringing valuable health and adherence management skills into the workplace through:

- Health management and drug adherence tools you can implement quickly
- Live demonstrations of cutting edge, successful health and wellness coaching
- Methods for demonstrating the value of care management to employers

Information will be delivered by a group of experienced, dynamic care management professionals, including:

- Deborah DiBenedetto, MBA, RN, COHN-S/CM, ABDA, FAAOHN
- Margaret Moore, Founder & CEO, Wellcoaches Corp.
- Bonnie Zickgraf, BSN, CRRN, CCP, Certified Health Coach
- Susan Rogers, RN, BSN, CCM, 2005-2006 National President CMSA

WHO SHOULD ATTEND?

- Disability Managers
- Case Managers
- Medical Directors
- CEOs
- Occupational Health Nurses

PRE-CONFERENCE WORKSHOP REGISTRATION

CMSA/IHPM Pre-Conference Workshop:

September 26, 2006
7:00 am - 5:00 pm

REGISTRATION FEES

REGISTER BY AUGUST 11 & GET A \$50 DISCOUNT

- \$295 for CMSA or IHPM members
Only \$245 after discount
- \$345 for non-members
Only \$295 after discount

REGISTER ONLINE TODAY at www.cmsa.org.

Discount will be automatically applied when you register by 8/11/06.

2006-07 CoP Facilitators

CMSA's **Communities of Practice (CoP)** is a great way for CMSA Members to network with other members while sharing resource, files, links and ideas to improve the processes in their organization and career. These Communities could not be possible without the support and time of our CoP Facilitators.

Many thanks to those who willing to step up to the plate for 2006-07!

Meet your 2006-07 CoP Facilitators:

Acute Care Hospital	Irene O'Connell Leather & Teri Treiger
Disease Management	Jeff Frater
Entrepreneur	Bill Kotowski
Managed Care	Wendy Clauson & Stephenie Been
Post-Acute Care	Joyce Miller
Social Work/Behavioral Health	Rachel Happel & Cathy Kauffman-Nearhoof
Work Comp	Karen Peters
Integrated Care Management	Pat Stricker

To signup & participate in a CoP, go to www.cmsa.org, under Membership, then Communities of Practice.

CMSA 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 a 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. Your Educational Library can be found at www.cmsa.org under the Education tab.

CHAPTER REMINDERS

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.

Download your order form today at www.cmsa.org/cmweek.

Products this year include:

- **NEW!** Wristbands – “CMSA One Purpose Many Paths”
- **NEW!** Posters – preprinted 11 x 17 CM Week posters
- T-shirts with CM Week logo
- Coffee Mugs with CM Week logo
- Travel Mugs with CMSA logo
- **NEW!** Ink Pens with CMSA logo
- **NEW!** Oxford shirts with CMSA logo
- Puzzle Pins are back – “Case Managers are the Vital Piece”
- CMSA Member Pin – **new design**



Preview and purchase these items at the Annual Conference in June, or place your orders for a September delivery. Also, visit the National CM Week website at www.cmsa.org/cmweek 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

Contact your city and/or state government to obtain a Proclamation for CM Week. Sample letters are available to assist you with your efforts.

Chapter Leadership Workshop Highlights

This year’s chapter workshop combined several styles of learning. Not only did the leaders hear from a Panel of chapter leaders on areas their chapter has excelled in and been awarded the CMSA Innovative and Excellence Award. But, there was also time to talk to ask them questions and interact in Roundtable Discussions. In addition this year, discussion on legislative outreach was introduced as a topic.

Teri Treiger, 2005-06 CPC Rep, oversaw the flow of the workshop and facilitated the program. Below are the leaders who presented on various chapter related topics:

1st Panel (*Increasing Membership Involvement*) – Dolores Burke, New England

2nd Panel (*Improve Your Effectiveness as a Leader*) – B.K. Kizziar, Dallas

3rd Panel (*Increasing Promotions of CMSA and the Industry*) - Deborah Gutteridge, Kansas City

4th Panel (*How to Be an Advocate for Case Management*) - Peggy Leonard, Ntl Legislative Chair

The speakers did a great job of presenting and put a lot of preparation into their portion of the program. Attendee feedback on the workshop was very high. The leaders really enjoyed the opportunity to talk to other leaders and share ideas and resources. Chapters were encouraged to keep the dialogue year around on the Chapter Presidents’ Council forum.

CPC Meeting Highlights

The Chapter Presidents' Council Meeting is held every year at the Annual Conference. This year's meeting was held Wednesday, June 14, 11:15a – 12:45p. The CPC is made up of affiliate chapter presidents, vice-presidents and president elects. Below are highlights of the recognition that took place during this meeting:

Innovation Award Winners

The 2006 Innovation Award Winners were announced. Please join us in congratulating this year's winners:

- 1) *Award of Excellence for Chapter Conference*
The Chattanooga Chapter of the Case Management Society of America
- 2) *Award of Excellence for Membership Development*
New Jersey Case Management Society of America
- 3) *Award of Excellence for Best Use of Technology*
The Case Management Society of Alabama - Birmingham
- 4) *Award of Excellence for Chapter Educational Program*
Dallas/Fort Worth Chapter of the Case Management Society of America
- 5) *Award of Excellence in Print*
Kansas City Chapter of CMSA

New CPC Rep

The results of the 2006-07 CPC Rep election were announced and Pat Agius was inducted to the CMSA National Board as the Chapter Presidents' Council Rep and a Director. She is very excited about her role and is looking forward to working with each of the chapters. She will be your voice to the Board on chapter issues. To contact Pat directly, call (203) 830-4180 or email pagius@comcast.net.

Anniversary Milestones

This year, many chapters were recognized for their anniversary milestones during the CPC Meeting. Congratulations on your hardwork and commitment to CMSA!

Celebrating 5 years:

1. Sacramento, CA
2. Panama City, FL
3. Jackson, MS
4. Asheville, NC

Celebrating 10 years:

1. Huntsville, AL
2. Little Rock, AR
3. Fayetteville, AR
4. Phoenix, AZ

5. Fresno, CA
6. San Jose, CA
7. Washington, DC
8. Newark, DE
9. Orlando, FL
10. Dade/Broward Cty, FL
11. Jacksonville, FL
12. Palm Beach, FL
13. Des Moines, IA
14. Ft. Wayne, IN
15. Chesapeake, MD

16. Detroit, MI
17. Greensboro, NC
18. New York, NY
19. Long Island, NY
20. Hudson Valley, NY
21. Nashville, TN
22. Richmond, VA

Celebrating 15 years:

1. Seattle, WA

Membership Growth

Each member, membership growth is compared from April 30 to April 30 to determine which chapters increased their number of members over the past year (*not number of new members*). The chapters are divided into categories and are compared by percentage of growth.

30 - 50 Members	% change	# increased		% change	# increased
AR - Fayetteville	68.00%	17	NY - Long Island	12.84%	19
51-100 Members			Over 200 Members		
TN - Memphis	26.32%	15	CA - L.A./Orange Cty	19.20%	62
WI - Madison	20.55%	15	FL - Orlando	22.79%	49
101-200 Members			MI - Detroit	10.03%	39
AZ - Phoenix	15.65%	18	NJ - Northern area	19.89%	72
MI - Grand Rapids	13.43%	18	PA - Philadelphia	13.41%	37
MO - St. Louis	24.14%	28			

Lunch was provided by **Orthofix, Inc** this year for the president, vice-president and president-elect leaders in attendance. Many thanks to our sponsor! **For more information on Orthofix, Inc. visit www.orthofix.com.**

Membership Meeting Highlights

CMSA's 2005-06 President Susan Rogers and 2006-07 President Connie Commander delivered updates on membership benefits and activity over the last year, plus a look ahead. The Annual Membership Meeting is when the new and old board members officially transition for the next year. During this year's meeting, some slight changes to the National Bylaws were presented and voted upon. The results were unanimous to accept the changes. There was also time set aside to ask the National Board questions from the membership.

Susan and Connie's slide presentations are available for chapter use. If anyone would like to have copies, please contact Michele Lee at mlee@acminet.com.

Dallas/Fort Worth Chapter

A Special Thanks to the Dallas/Ft. Worth Chapter for their hospitality and support. Not only did they show pride for their city and share their great smiles, they also set up a Dallas/Ft Worth Booth by registration to greet all attendees, and provided goody bags for the CPC Meeting. Six of their leaders helped in the CMSA Booth in the Exhibit Hall and did a wonderful job. Boy, were they busy! Thank you for help in hosting CMSA's Annual Conference!

Registered Agent Services – Fees Due

In July, CMSA's Registered Agent (Corporation Service Company or CSC) will mail an invoice for services to each affiliated chapter for this next year, beginning Sept 1, 2006 to Aug 31, 2007. Corporations are required by the DC Statute to engage the services of a registered agent. Also, most states require that you have a registered agent when you incorporate within your state, as well. Each chapter is incorporated in DC as a Domestic Corporation but in your state you would be registered as a Foreign Corporation. Your invoice may reflect services for DC (Domestic) and maybe local (state) fees (Foreign) – if you used CSC for the local agent.

The invoices may go to your chapter Treasurer, President or Executive Director. Please make sure that these invoices are passed along to the proper person for payment and processed to keep the chapter in good standing with DC. This is very important.

LETTER FROM YOUR CPC REP

Hello Everyone!

For those new chapters or those new to chapter leadership, the role of the National CPC Rep is to preside at Chapter Presidents' Council meetings, to encourage chapter leader communication on the CPC forum, and to serve on the CMSA Board. In this Liaison role, chapter activities and concerns are shared with the board and information is communicated back as permitted for release using the CPC forum. The online CPC forum is a communication link for chapters in which we can share ideas, exchange information, and seek assistance. It is a means, therefore, to share information on programs/topics/speakers as well as provide assistance with other resources that you may need to develop for your chapter. You can get help with items such as board/membership development, bylaws, job descriptions, chapter activities, case management week ideas, mentoring, sponsor/exhibitor resources, etc., to name a few.



Networking, collaboration, and communication are key to all of our chapter's growth as well as in spreading the word on the value of case management. As a chapter leader in NJ, I found the past year's CPC forum to be one of the best. There were many opportunities for learning and exchange of information. The responsiveness to questions and the assistance given was impressive. For those of you who had the opportunity to be at the Dallas convention in June, this collaborative effort carried through to the conference as well. There are many resources available and creative ideas going on at the local level, many of which involve little or no cost, which is important to all of us. Knowing that at the local level we have these many resources available to us is a great support. It is especially helpful with the challenges and the tasks before us.

In the weeks ahead, we will all be going through the information and conversations we had while in Dallas. Please use the forum as a means for follow-up. One of the first topics on the CPC forum upon our return was phone conferencing. Within a short time there were several sites suggested as contacts. As we connect with those contacts, feedback will be helpful as well.

As the 2006-2007 CPC Rep, I am honored to serve as Chair of the Council. I thank you for your support in this elected position and look forward to the year ahead along with the other members of the CMSA Board.

I would like to take a moment to congratulate the winners of the CEA that were announced at the CPC Luncheon: Conference-Chattanooga; Membership-NJ; Technology- Birmingham; Education-DFW and Print-Kansas City. Special thanks go to Teri Treiger, 2005-06 CPC Rep, for her leadership and tireless efforts over the past year. The picture collage of the chapters presented at the luncheon was a great addition to the program as well. Thanks again and we look forward to working with you again.

Please join me in working together to make this another successful year for our chapters.

Warm regards,

Pat

Pat Agius
2006-07 CPC Rep
CMSA Board of Directors

CHAPTER HIGHLIGHTS

To contact any of the local affiliate or pending chapters, visit www.cmsa.org - under the Membership link choose Local Chapter.

Pending Chapters

Lexington, KY

The Lexington, KY group has worked very hard over the past year and are ready to take it to the next level! They have feel confident with their activities and commitment from the group to proceed with the final steps in affiliation. Over the next couple of months, they will be working hard to accomplish this and look forward to being part of the CMSA family as the Bluegrass State Chapter of CMSA.

El Paso, TX

Several individual members in El Paso, TX have shared very strong interest in begin the steps of forming a group in the area. They hope to have their first public meeting at the end of summer to begin telling others about what they would like to accomplish and begin building awareness of the group that is forming. This group is very excited and we'll be hearing more from them soon!

Official CMSA Chapters

Birmingham, AL

The Tuscaloosa Extension of the Birmingham Chapter held a business meeting on June 27to brainstorm methods to increase enrollment. The group is planning on bringing in a speaker for September meeting and will continue to giveaway a one year membership at each luncheon meeting. They brainstormed ideas for CM Week including citation by mayor with publicity in the local press. They are also meeting with members of Easter Seals to determine if there is a way as an organization to support their efforts and bring visibility to the Chapter.

Huntsville, AL

CMSA North Alabama Chapter has committed to providing an endowed scholarship to The University of Alabama College of Nursing. The scholarship will help support nursing students in the graduate nursing leadership program. The North Alabama Chapter feels it is important to invest in the future nursing leaders. Students in the nursing leadership program are required to study a course in Case Management as part of their education curriculum. Case Management is one area of nursing expertise where the nurse at every level is guiding and leading their patients to a path of goal attainment in a multiple health care environments. This chapter is proud to work with health care providers in the north Alabama area as they assist the chapter in reaching the goal of an endowed scholarship for nursing education.

Dade/Broward County, FL

Congratulations to all the chapters that received awards at the National Conference. The Dade/Broward Chapter received awards for Print, Education and for being in existence for the past 10 years. They were excited to get these awards and look forward to getting more next year. The chapter is continuing their membership drive by being a part of a picnic event put on by local vendors in the area who focus on Case Managers. They are expecting to have 200 plus people and will be able to promote CMSA. In addition to that, the chapter is working to do a local Case Manager Information Day at some of the local hospitals. The chapter is looking for creative ways to promote Case Management to the hospital based Case Managers. They are also getting ready for the elections coming up this year. It has been a busy year but worth the efforts!

Panama City, FL

The Bay Area Chapter in Panama City, Florida donated \$1,000.00 to the Children and Family Services in the area. They are losing the building they are in if they don't secure financial backing. The community has stepped up and has offered fund raisers, donations, etc... Children and Family Services are extremely important in communities and offer a number of services to families. This was a cause worth donating.

Atlanta, GA

The Atlanta Chapter bid farewell to a founding member, former chapter president and CMOY when Mary Hoyt lost her long struggle with an illness on June 13. The Board was honored to serve as honorary pallbearers, as she had requested. She will be missed by this chapter and every other organization and person she touched. "She Who Laughs, Lasts".

Final preparations for the annual conference "Laying the Foundation for Positive Outcomes Through Effective Case Management" are underway. The chapter has received a proclamation from the Georgia Governor, Sonny Perdue, naming the week of October 8th as Case Management Week. The chapter is thrilled to have Susan Rogers, immediate past president of CMSA, as their keynote speaker on October 7.

Elections for CMSA – Atlanta 2006-2007 Officers and Board of Directors are underway. There are several new members who have volunteered to take up positions of leadership for this growing, energetic group. That, plus the formation of a Strategic Planning Committee, and the generous assistance of the Dallas – Fort Worth chapter, will assure planned growth and involvement.

Chicago, IL

CMSA Chicago takes the summer off. The newly elected board will meet on August 8 to plan the 2006-2007 season. The chapter is planning on hosting eight (8) educational/networking dinner meetings and the yearly conference in April. Six of the board members attended the National CMSA conference in Dallas. What a great opportunity. Everyone came back energized and enthusiastic about the chapter. It was a great place to gain new ideas and to gain contacts for speakers next year. The chapter is very interested in incorporating community involvement into the local program next year.

Detroit, MI

The Detroit Chapter Board and CMSA Members from Michigan had the most fun and good learning at this year's National CMSA Conference. The Chapter received Recognition for Outstanding Membership Growth, Recognition of Outstanding Efforts for the Conference; Recognition of Outstanding Efforts for Membership and Recognition of Outstanding Efforts for Educational Program. Not only was it great networking opportunities it was also very charged with each keynote speaker. The Chapter also looks forward to their next conference September 12th at Burton Manor, Livonia, MI in which the topics will be Addictions from A-Z, (Alcohol – Zydone), featuring physicians: Dr. Malinoff and Dr. Halpern.

Omaha, NE

The Nebraska Chapter of CMSA is in "motivation mode" after five (5) board members and two additional members returned from the national conference. Bursting with ideas from the Chapter Leadership workshop, they are set to start up a website this summer and to grow their membership! A recent joint effort with National Jewish hospital brought nearly half of their membership to the June "Dinner and Learn" meeting in Omaha. The chapter is now gearing up for their fall conference.

Woodbridge, NJ

On behalf of those Board and Chapter members who attended the CMSA convention in Texas, the chapter would like to extend thanks and appreciation for a great conference. The Planning Committee and support teams did a great job this year in offering a wide selection of topics. Thank you for your tireless efforts all week long. Thank you to all the sponsors, exhibitors and speakers who gave so much support to CMSA. Teri Treiger and the panelists did a great job on the Leadership Workshop. Thanks as well to the Chapter Leaders who

shared information on their processes etc. that will be helpful to all chapters. And thanks to the DFW Chapter for your hospitality. New Jersey had a great time! Finally, thanks to the Judges who selected NJCMSA Chapter for the 2005-2006 Excellence in Membership Development.

So now that the conference and short break is over, the chapter is gearing up for bylaws update, election process, web site development, program development and a CCM prep course, as well as continuing to test meeting sites and program frequency. Membership is at 441 which continues to bring many new considerations.

Congratulations to the 2005-06 Board of CMSA for a job well done and to the 2006-07 Board Members our support.

Las Vegas, NV

CMA-LV received their official CMSA affiliation in June of 2006. To that end, the chapter has just embarked on their first annual membership campaign. The membership committee has set their goal to secure 30 members by year end. In order to accomplish this goal, they are planning various activities including CMSA memorabilia raffle; join CMSA and enter to win a free membership next year; and a telethon to actively recruit new CMA-LV members. Any commitments received via the telephone campaign will be eligible for a \$50.00 calling card in keeping with the telethon theme (hey, it is Vegas what do you expect?). To get the word out to the local health care community, Board members are attending various local meetings announcing the recent affiliation with national CMSA. They have found that the marketing and sales are the most receptive to these early announcements, and many have offered to assist with future programs and sponsorships.

CMA-LV is also working at the Board level to ensure that all Board members join CMSA. This has proven to be a great opportunity for some of the local health care entities to get acquainted with CMA-LV as many of these same organizations will be getting reimbursement requests for dollars paid out to CMSA!! Naturally, this exposure is welcome and also challenging each other's organizations at the Board level to work collaboratively with their Senior Leadership to reimburse for employees memberships in this professional society of case management.

Reno, NV

The Northern Nevada Chapter of CMSA is now able to say they are official. They have survived their first year as a group. An energetic new board has just been elected. They are gearing up to take on a new and exciting year of CMSA learning, sharing and challenges. To begin with, they are trying to reassess what worked in the first year and what may need some fine tuning. The chapter is trying to put together their first website, and is finding it far more challenging than they first thought. Currently, they are putting together their first major conference, and of course, centering that near a favorite food event, *Fantasies in Chocolate*.

Hudson Valley, NY

June was very exciting month for the Hudson Valley Chapter. They were very fortunate to have all of their Board of Directors and Officers attend the National CMSA Conference in Dallas this year. The enthusiasm is still evident as they plan for the installation of two new Board Members, Rita Orlando, Veronica Cepak; Secretary Pam Williams; and new President Nancy Heitman. Additionally, four members attended the leadership meeting that offered innovative ideas and achievable goals for the upcoming year.

The Chapter was honored to have one of "it's own", Peggy Leonard, win the prestigious Case Manager of Year (CMOY) Award. They are proud of her accomplishments and dedication to the profession of case management. It was a wonderful time and a great celebration. The Chapter does not meet during July and August but will be having a welcome dinner for the new members of the leadership team in July and then move forward with a planning meeting in August. The Board is looking forward to another great year.

Chattanooga, TN

Chattanooga Chapter CMSA is very honored to have received the Excellence in Innovation Award for Chapter Conference at the National CMSA meeting June 14-17 in Dallas. The Conference Committee worked very hard to provide an outstanding conference in combination with their 10 year anniversary as a chapter.

A lot of good ideas for chapter activities and potential programs for the membership were brought back from the National Conference. Planning is underway for the upcoming chapter year. Ballots are currently out for election of this year's officers and board. Nomination forms are being distributed for the Case Manager of the Year and Grass Roots awards. The winners will be announced during Case Management week.

Dallas, TX

What a wonderful national conference it was! The DFW Chapter hopes everyone enjoyed the Texas hospitality of the Gaylord Texan & the people of Texas. As host chapter, the chapter was so pleased to be able to meet many new faces & welcome old acquaintances to their backyard.

Patti Grady & TrailBlazers Senior Trails were awarded the AEAM award for best use of the CMAG system. Patti has worked diligently on the CMS demonstration project partnering Senior Trails with the Texas Tech University to reach out to more than 5,000 seniors in the west Texas area. Congratulations to Patti to a job well done!

The DFW Chapter was honored to receive the Chapter Excellence and Innovation Award in Education. The entry profiled the Spring Leadership Retreat produced by the Chapter's Strategic Planning Committee & made possible through the generosity of great sponsors. The Strategic Planning Committee is already planning the 2007 Retreat!

The 2006-07 Chapter officers were announced at the May meeting. They will assume their roles at an all day transition meeting that will be held July 22nd. The objective of the meeting to provide a seamless process for the entrance of new officers. During the first half of the day the out-going officers will provide an overview of their position & role as well as present the accomplishments that office experienced during the term. The second half of the day will have the incoming president, Pattie Pittman, explaining the planks in her platform & calling to order the first board meeting of the new term.

Seattle, WA

The Washington Medical Case Management Association (WMCMA) held their annual Provider Fair on May 11 in Seattle, WA. The event, titled "Tools for the Trade: Bringing Together a Community of Quality Care Providers" was well attended with over 100 attendees and 36 exhibitors coming together to network and share resources with one another. Providers from home health and hospice agencies, skilled nursing facilities, medical equipment companies, ambulance companies, hospitals, senior service agencies, pharmaceutical companies and more were on hand to provide information and education on the community services available to case managers and their clients.

WMCMA had their own exhibit at the event, run by WMCMA's chapter president Gloria Simmons, with an emphasis on membership and education. As an added incentive, fabulous prizes were given away including a 1-year membership to CMSA/WMCMA and two free passes to one of WMCMA's monthly educational lunch programs. In addition, many exhibitors brought their own gift baskets and held random prize drawings throughout the event.

The event, which included a catered appetizer bar and dessert, was provided free of charge to attendees, thanks to the help of several sponsors who helped to offset the cost of the event. Overall, the provider fair was considered a well attended and successful event with plans already underway for next year's event.

ACCEPTING RESPONSIBILITY FOR THE BOARD, www.boardcafe.org

Who is responsible for the board's doing its job? And a different question: who's responsible for "fixing" a board that's gone wrong? The natural answer might be: the board is responsible for the board! Or possibly, it's the board officers who are responsible for the board. Or sometimes: it's a shared responsibility of the board and the executive director.

The Board Cafe agrees with Peter Drucker: The responsibility for the board's effective work-both governance and support-is the responsibility of the executive director. In fact, the board should evaluate the executive's performance in part on how effectively the board does its job.

This can sound paradoxical at first, but veteran successful executives know it's true. They consistently acknowledge that they take on their shoulders the responsibility for the board's doing its work-probing ideas and plans, supporting the execution of those strategies, and evaluating executive performance.

What a paradox: an executive must recruit and support a board that is the opposite of comfortable-a board that will challenge him, evaluate him, and be able to independently assess the organization's performance. If he doesn't-the board will negatively evaluate him for it.

Let's take the situation where there's an engaged board with strong board members working with a strong leader in the executive director/CEO role. In such an instance, the question may not even be asked. Shared responsibility comes naturally.

The executive director may find herself both supporting and leading the board, engaging them in strategic decision-making, while at the same time the board challenges the executive, tests plans with rigorous inquiry, and engages the executive in strategic thinking.

Next let's consider the organization with a strong board and a weak executive. Board members may begin with guidance and constructive feedback; provide an executive or fundraising coach, or even trying to compensate for the executive's weaknesses themselves. Over time, they will remove the weak executive. In fact, Daring to Lead 2006, a new national study of nonprofit executives, found that one-third are either fired or forced out of their jobs-evidence that boards take action when they see problems (the study can be downloaded at www.compasspoint.org/content/index.php?pid=19).

But what if there's a strong executive director, and a board of directors that adds up to less than the sum of its parts? In this situation, board members may feel that "things are going fine and there really isn't that much we have to do." The executive is likely to feel unsatisfied with the board and wish they were "engaged" or raising money, but after all, they aren't getting in the way. These are the executives who find themselves muttering, "How can they tell me how to do my job, when they can't even take responsibility for getting a quorum." Or even, "I just don't see the point of the board if they're not going to raise money."

These are the cases-remarkably common-where the question arises: just who IS responsible for the board anyway? The successful executive director holds himself or herself accountable for the success or failure of the organization-and that means being accountable for the board as well. And there are three ways that CEOs can change boards: by changing who is on the board, by changing the way the board works, and by changing how she as the CEO works with the board. None can be neglected!

Related articles from past Board Cafe issues, archived at www.boardcafe.org.

Communicating With Your Members

When associations' were asked to describe their retention efforts, one fundamental component of all answers was communication. Communications could include newsletters telling members what you've done for them or telephone calls from the board to see how the association is doing for members. These communications significantly influence members' retention decisions.

Characteristics of Communication – How to Get Your Message Out

1. **Timeliness.** One of the greatest association crimes is when members and other potential customers receive promotion materials after an event has occurred.
2. **Appropriate frequency.** How often do members hear from your association? Do members receive several different items separately all on the same day? These small annoyances add up and sway their renewal decisions. Avoid these problems by creating a master calendar of member communications.
3. **Appropriate format.** Rapidly developing forms of electronic communication are getting a lot of attention from associations. Decisions about what technologies to use are complex. Major factors include the level of comfort and flexibility your members have with technology.
4. **Right audience.** Associations have the upper hand here. By paying dues, members choose to be on your mailing list and receive your communications. In contrast, commercial vendors must first identify their market and then persuade people to open their mailings. Don't abuse your advantage by over mailing or sending out items that have little value.
5. **Proper implementation.** An informative electronic newsletter loses value if members have difficulty accessing it. Your communications can exhibit all of the four characteristics above and still be ineffective if improperly implemented. Members judge their association's performance on the basis of what's visible. If your association has trouble getting mailings out on time or can't spell names correctly, members will lose confidence in what they can't see, such as your ability to coordinate complex negotiations or effective lobbying activities.

Reasons to Communicate – What You Want the Message to Accomplish

There are five primary reasons for communicating with members:

1. **Identify members' needs.** Every time you ask your members what they want and need, you're obtaining valuable feedback. Survey formats vary tremendously—from a monthly newsletter to a multi-page survey. Perhaps some of the most critical issues are those concerned with “triggering events.” For instance, receiving a membership application and dues check may trigger your association to make a welcoming telephone call or new member survey. Similarly, an expiring member may trigger an exit survey. Another key triggering event is when new members sign up for their first meeting or seminar. Many associations have revised their activities after researching members' schedules of activities. The better the organization can identify triggering events, the better it can respond to members' needs.
2. **Contact members.** Association members usually want, need, and, to some extent, demand contact. Staying in close contact demonstrates that your association cares about its members. Mal-only contact can leave member feeling detached from the association.
3. **Inform members of products, events, and issues.** Perhaps the most prevalent objective of membership organizations is met through communicating with members: from a calendar of upcoming events to a formal education seminar, the need for information is often a primary reason to join. When asking experienced Board what advice they could give new Board regarding retention. The most common answer was, “Tell members what you're doing for them.” Don't assume that members see your association's accomplishments.
4. **Respond to members' needs.** Membership organizations typically respond to members' needs quite well. Responding to members' starts with simple actions. Members might not renew simply because they didn't get a call back as promised. More likely, however, the decision is cumulative. It results after members receive incorrect answers to queries, no responses at all, poor telephone service, or a monthly publication that missed the mark. Beyond answering telephones, it's necessary to get to the heart of retention: delivering the goods. What does the latest research show that your members want? How are you responding? What can be done to improve the situation?
5. **Involve members.** One key ingredient of retention is getting members involved in your association activities. When members become volunteers, the full value of membership (especially in the form of relationships with other volunteers) usually becomes evident, and the renewal decision is more likely a matter of commitment. Every communication takes the form of delivering goods to members, and, every communication affects retention.

Excerpt from article by Arlene Farber Sirkin and Michael P. McDermott, Authors of *Keeping Members, Myths & Realities*.

Revitalizing Your Chapter

Adapted from article by Cynthia D'Amour, www.chapterleader.com

If you want people to be excited about what is going on with your chapter, you've got to first get their attention.

Once upon a time, a simple announcement might have done the job -- but that was back when women wore shoulder pads that could keep with football players.

Today, you've got to first get your members' attention -- which is easier said than done.

Five years ago, you might have gotten by with a simple e-mail or two. Now, your e-mails may not even reach members' in-boxes due to heavy duty firewalls. If they do reach the in-box, there is no guarantee that the e-mails will be opened. E-mails only work if members read them.

How many unread e-mails do you have in your in-box? Many folks get so much volume they may run on a few days delay for lower priority mail. Or, you may not have the e-mail address that is read every day. I have a work e-mail which is monitored multiple times each day and a personal e-mail that I might get to once a week.

Okay, if not e-mail, how about a newsletter? Of course, they take time to create and cost to mail. And, there's still the challenge of getting the members to open them.

- Will the newsletter stand out in the daily stack of mail and inspire members to read what you are offering?
- Will your call to action be clear, strong and compelling enough to inspire members to want to check out your revitalized chapter?
- Will you write with excitement and make the revitalized efforts sound welcoming to those who haven't been around in a while?

What about a letter in a business envelope?

- Is it going to be mass-mailed with labels and look like junk mail? Or will someone personally address the envelopes to intrigue potential readers to open the envelope? (How often do you get hand-addressed envelopes in the mail?)
- Will the letter inside have a headline that catches members interest enough to give your communication more than a 5 second scan?
- Will the close include a welcoming call to action?

What about personal phone calls to members?

- Are you willing to share your enthusiasm?
- Are you willing to allow others to join your revitalization team and provide meaningful impact?
- Can you customize a potential role in your revitalized chapter to fit the person who you are speaking to at the time?

What is the best way to get members excited and involved in your revitalized chapter? Who knows? Every chapter has different members. Areas may have different hot buttons to inspire involvement.

Here is what you need to do:

1. Be open to trying new ways to get attention. Get creative. Be competitive. Ask for help from others.

2. Test different approaches and note what works best for your chapter. You will find that certain combinations of words in the headline and call to action will inspire more people to say "yes" to you. If you keep at it, you will find the magic key that will speed up your efforts.
3. Continue to invite members to be involved. Building momentum is a process not a moment in time. It takes the average person 6-8 exposures to something before they can say yes. Asking once is not enough. Direct mail research says if you send out a mailer and get a 20 people to respond, if you send the same mailer again, 50% of your previous results should respond. Keep using what works once you find it.
4. Personal requests always work best. If you are truly building from the ground up or you are serious about bringing new players on your team, personal asking is the best way to get people on board.
 - With personal interaction, you can customize your offer, listen to suggestions and give potential players an opportunity to preview live the type of leader you will be.
 - Personal calls can be spread out to your core team.
 - Personal calls do take more time than sending a blanket e-mail; however, you'll get a bigger return for your effort.

You don't have to call everyone; however, calling at least a few will give you the opportunity to identify what pitch works best so you can use it in your mass appeal efforts.

There are lots of things to think about with this issue. People are on overdrive and time is a scarce resource. Getting their attention is critical for your success. Your old approaches may need to be updated.

If your team is committed to revitalizing your chapter, you will find the combination that works best for your members -- and create the chapter of your dreams.

About Health Politics

www.healthpolitics.com

“Health Politics with Dr. Mike Magee” is a weekly Internet-based electronic media program that explores complex topics at the intersection of health care and policy. Supported by veteran health leader and media expert Mike Magee, M.D., the program examines the hidden stories and emerging trends that are rapidly reshaping our health care system. As a passionate advocate for patients and their families, Dr. Magee strives to help his viewers understand the big picture of how our health care system works and how it affects their lives – offering, along the way, practical advice on what we need to do to make the system work more effectively for all of us.

The program, which is distributed via Webcast each week to a growing list of subscribers, provides health care commentary by Dr. Magee in multi-media format - including audio, video and informational slides. In addition, health care blogs and podcasts by Dr. Magee are available. Subscribers are emailed each week's program, or they may visit www.HealthPolitics.com, where all of the materials are easily accessible and downloadable. Other features at the Website include access to an extensive list of related links and resources for each week's programs, and a full archive of all the programs previously published by Health Politics.

About the Pfizer Medical Humanities Initiative

Health Politics is supported by the Pfizer Medical Humanities Initiative, an education and research project founded in 1997 and supported by Pfizer Inc. In addition to worldwide studies of health care, leadership and the patient-physician relationship, the initiative supports numerous scholarship and grant programs for physicians, medical students and patient groups.

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- Use information from our various health channels for research purposes.
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