

THE CHAPTER DISPATCH

October 2006

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AT A GLANCE – Important Dates

2006 CALENDAR

Sept 1 – Nov 30 Member-Get-A-Member Campaign

2007 CALENDAR

January 15 IRS Reports Due

January 15 Treasurer Reports

February 14 CMOY/AOSE Award Nomination Deadline

June 19-23 17th Annual Conference Denver, CO.

NATIONAL UPDATES

Address Change



CMSA National Office has moved to a new home!

Our new address is:

6301 Ranch Drive

Little Rock, AR 72223

1-800-216-2672

Please update your records to reflect the change.

MEMBER GET A MEMBER CAMPAIGN

Recruit a case manager today. Your participation in member development campaigns plays an important and vital role in ensuring the vitality of the Society and the case management industry. Your efforts never go unnoticed and each time you recruit a new member or spread the word about case management you contribute to CMSA's growth, as well as strengthen the Society's position as the leader in the Case Management industry.

This is a great way for you to get involved in the recruitment! Simply print out the Member-Get-A-Member applications located at www.cmsa.org/recruit. Don't forget to put your name and city on the 'recruited by' section to get credit. You must also be a member to qualify! You may recruit Individuals or even a group Company Membership! *For Company apps, please write in 'recruited by: and your name' in the **upper right hand corner of the application** or use labels.*

So, hand out applications to your co-workers & others in the industry. Encourage membership to CMSA and earn recognition for your efforts!

Contest Ends November 30th

For more information and ideas on how to promote the program, visit www.cmsa.org/recruit.

Communities of Practice

If you have not yet explored and taken advantage of CMSA's Communities of Practice, you should to set up your web Profile today and get started. CoP's are powerful tools that help you keep up to date with changes in the CM field. Increasingly CoP users turn to one another online for support, new ideas, and information. Since face-to-face interaction or communication by telephone is not always convenient or possible, you'll save time, money, and effort when you become active in a CMSA CoP! There is a lot of valuable information that can be used as resources to help both the case manager. Encourage your membership to take advantage of this valuable member only benefit!

Why Be a Part of CMSA's Communities of Practice?

- Network with your peers for solutions and ideas
- Share best practices that you've learned on the job
- Problem-solve
- Find links to useful sites for resources and industry news

Each online community consists of a group of individuals who have a shared purpose and common interests. CoPs are organized around these common interests and practice settings:

- Acute Care/Hospital Case Management
- Disease Management

- Entrepreneurs/Business Owners
- Integrated Care Management
- Public Policy
- Managed Care
- Post-Acute Care (*Elder Care, Home Care, Long-Term Care & Rehabilitation*)
- Social Work/Behavioral Health
- Workers Compensation/Occupational Health
- Academic - Evidence Based Practice (*by invitation only*)

CMSA is dedicated to bringing members like you tools you can use in your career, as well as those needed to address specific life needs. CMSA is dedicated to equipping you for success in all areas of your life.

Legislative Affairs Communities of Practice Online Forum

CMSA developed a Legislative Council in Spring 2005 as a grassroots committee to begin learning about health policy and how CMSA can become more knowledgeable and educate members on issues going on in today's healthcare industry, particularly case management. In these efforts, one of their recent goals has been accomplished – to bring CMSA members a means of sharing knowledge and seeking involvement! **CMSA has added the Legislative Affairs Communities of Practice to their list of CoP's.** This online forum allows members to open discussions, share articles and files, link websites and participate in polls. This feedback will be useful to not only the members, but also the Legislative Council to determine member needs, interests and resources needed to help our members become more educated on the legislative process and involvement. If you've not yet been on the CoP, please create your User Profile and begin today! You can find the CoP at www.cmsa.org under Membership. Once on the CoP pages, you will create another Profile just for these pages as an outside vendor houses them. If you have any questions, please contact Member Services.

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 should begin being compiled. Budgets costs for the next year should be discussed now. For more information on the financial obligations of the organization, please review 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. **Reports deadline is January 15. Start today!**

Nominate your local CMOY & AOSE Award nominations

Take a moment to nominate your peer for a Case Manager of the Year (CMOY) award or Award of Service Excellence (AOSE). The deadline is **February 14, 2006**. Each year at the annual conference, CMSA presents these two prestigious awards to members whose case management careers elevate professional standards, enhance individual and leadership performance, and exemplify merit and distinctions. Visit www.cmsa.org Click on "Your Career" then on "Awards" to download forms and view previous award winners. That special case manager deserves and award, so why not help recognize a deserving CMSA member who has significantly impacted the field of case management. Contact CMOY/ AOSE Staff Liaison Michele Lee at mlee@acminet.com (501)225-2229

Excellence & Innovation Award Program – NEW DEADLINE!

Enter your chapter's best projects in CMSA's 2007 Chapter Excellence & Innovation Awards (CEIA). Entries will be accepted in the five categories Best use of *Technology*, *Conference*, *Educational Programming*, *Membership Development*, and *Print*. **Entries will be taken until February 28, 2007. This is a New Deadline! Entries reflect activities from Jan 1-Dec 31.** Visit www.cmsa.org, click on "Your Career" then on "Awards" to find out more and to download entry forms. Recipients of these awards will be recognized at the Denver 2007 Annual Conference.

CSC Registered Agent Invoices

In July, CMSA's Registered Agent (Corporation Service Company or CSC) mailed 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 might have gone 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!

Chapter Officer Updates

Many chapters still have to undergo elections for the new term. Be sure to get the names, titles and email addresses of these new officers, board members and committee chairs to CMSA National to update the Leadership Database. Please remember that this information is used to determine who to include on correspondence, reports, chapter checks disbursement, chapter contact information, etc.... For the official Officer Update Form, please visit www.cmsa.org, under Membership, then Chapters, then Chapter Resources. Please complete and fax to 501-221-9068 or email njackson@acminet.com.

LETTER FROM YOUR CPC REP



Greetings to All,

From October 25-October 27th the CMSA Board met in Washington, D.C. Aside from our business meetings we had the pleasure to meet with the staff of several key State Senators such as Hillary Rodham Clinton (NY), Kay Bailey Hutchinson (TX), Chuck Schumer (NY) to name a few.

As an introduction each office was given a copy of the CMSA Standards of Practice as well as a detail piece which described the CMSA Vision and Mission Statements, Case Manager Definition, as well as populations served and our membership numbers.

In addition, they were also presented with a Press Release from the National Transitions of Care Coalition, dated Bridgewater, NJ, October 3, 2006 – The Case Management Society of America (CMSA) and sanofi-aventis U.S. LLC today announced the establishment of the National Transitions of Care Coalition (NTOCC) to improve the quality of care between health care settings particularly for seniors.

The purpose of the NTOCC is to bring together thought leaders and health care participants from various settings to address critical issues. The NTOCC will define solutions and develop tools to address the gaps impacting safety and quality of care for transitioning patients, particularly seniors and make these tools available to the health care industry.

This provided CMSA with an opportunity to discuss how case manager involvement in health care policy development can help to affect change and improve outcomes such as decreased fragmentation, improved clinical and financial outcomes of care, and increased consumer satisfaction. Due to timing many state offices were anxiously awaiting election outcomes and changes that would be coming to task forces and committees. However, we had a warm reception and interest shown at all sites and were told that we would be given contact information after the elections which may provide us with new opportunities for collaboration. One interest may be with regards to the “Patient Navigator Bill”.

In addition, we had a dinner meeting with some members of the National Association for Social Workers, which included their Executive Director, Elizabeth Clark. This may open up new doors for networking and collaboration. For they have a significant lobbying interest and are well connected in Washington.

As such, watch for more details to come from the CMSA Board and Committees on all these new challenges and opportunities ahead for us. Something we can all do at the chapter level now is to continue to work with your state and local representatives and helping them see the need to include case managers. The Board would like to impart to you on how easy it was to set up meetings with the Senator’s offices. Please make the connections and share your stories with other chapters.

Happy Thanksgiving to all of you and to the staff of CMSA National may the move go smoothly and best wishes in your new location.

Warm regards,

Pat Agius
CPC Rep 2006-2007

CHAPTER HIGHLIGHTS

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

Official CMSA Chapters

Fresno, CA

December is an exciting month for the Central California Chapter of the CMSA. The chapter is preparing for a Holiday Luncheon that will be held at the Ramada Inn in Fresno, CA on Dec 13. Dr. Greg Bijac, M.D. whose topic is “Interventional Treatment of Chronic Pain” will be the keynote speaker for the December festivities. The Central California Chapter always chooses to sponsor a group to bless through donations for the Holiday. This year the Board has chosen the “Adopt A Senior Project” and guests will be asked to bring donations. Those donating \$10.00 or more will receive a special CMSA “Goodie Bag” before leaving the luncheon. Donations will be accepted by mail or at the luncheon.

In addition to the main speaker, there will be presentations by many other vendors and time for the nurse case managers to network. It is anticipated that many guests will be in attendance as well as many prospective new members. The goal for 2007 is to generate an increase in membership, monthly meeting attendance and to spark interest in case managers from every arena in the Central Valley. The Chapter Board of Directors for the 2007 year will be introduced and will be available to meet individually with participants. Experienced Case Managers will share their Testimonies and Success Stories about the positive impact of Case Management in their careers and in the lives of others. They will share tips for new Case Managers. It is hoped that more interaction that is personal, will lead to a positive and connected feeling among those in attendance, the current membership and those who hope to become members. Advanced Bionics Corporation is the sponsor for this event.

The New Year, 2007, will be one of growth and challenge to all of the Case Managers in the Central California. Look forward to more exciting news as the New Year ensues!

Indianapolis, IN

The planning for the 12th Annual Conference, Nov 8 at Hyatt Regency ~ Downtown Indianapolis is going very well. The focal point is *Managing the Pyramid of Health—Mind, Body, Spirit* and the response by both exhibitors and attendees is increasing. Information regarding the conference is posted on the web site www.cmsaci.org.

Dr Sue Morter, the keynote speaker, is the head of a multi-disciplined wellness center in Indianapolis, Indiana, which she founded over sixteen years ago. With a fresh approach, Dr Sue weaves together the importance of knowing how to bridge our worlds of spirituality and practical living, as it shows the link between what we think and how we feel physically.

Additional topics and speakers include; *Finding the Extraordinary in the Ordinary: Every Day is a Gift*, Rita M. McCloskey-Payne, BA, MBA; *Behavioral Health In The Care Plan*, Mike McKasson, MA, LCSW; *Life's Journey (Palliative Care)-A patient care continuum from hospital to home health*, Lisa Arms, MHA, BSN, RN; *Cost / Benefit of Bariatric Surgery*, Margaret Inman, MD, FACS.

The election of new Officers and Directors were announced and installed at the Sept 20, 2006 Annual Meeting. They are all very excited to plan the growth of Central IN CMSA.

Baltimore, MD

CMSA of the Chesapeake held their annual all day conference entitled "Case Management-Building an Effective Team Within an Ethical Framework" on Oct 10, 2006 at the Maritime Institute in Baltimore, Maryland. The attendees enjoyed listening to the keynote speakers Joseph Procaccino, Jr. and Louis Feuer. The breakout sessions focused on case management of the injured worker; promoting and marketing the value of case managers; palliative care case management of pediatric and adult patients; and depression, chronic illness and pain. This year the conference attracted 150 registered attendees and 39 vendors. The president of the chapter would like to thank the present board members as well as the past board members for their help in making this a wonderful, fun-filled conference!

Springfield, MO

The CMSA of Springfield and the Greater Ozarks had its annual seminar on Nov 4th with the Vendor fair on the evening of Nov 3rd. The seminar was very successful with 57 attendees present. The topic was "Brainstorming" focusing on head injuries, developed by a stroke or traumatic brain injury.

The decision to try something new this year by moving the seminar to a hotel rather than in one of the local hospitals was an excellent one. This move seemed to generate more attendance or was it the timely topic?

Charlotte, NC

The CMSA Charlotte Metro Chapter is excited about the launch of their new website, www.cmsacharlottemetro.org, the chapter put a lot of time, effort and research into the development of the site. This site will give members and non-members access to educational events, ease of registration for educational meetings, news, area job postings, links and resources, and a way to share information from the board members and ease of the community to contact CMSA Charlotte Metro. Also, a new display board has been developed to promote the CMSA Charlotte Metro Chapter as the area's professional resource for Education, Information Sharing, Career Development, and Networking Opportunities for Case Management.

The CMSA Charlotte Metro Chapter held its October Educational Meeting during Case Management Week, at the "Palm" restaurant in Charlotte. The meeting's speaker and dinner was sponsored by Pfizer, the topic was "Alternative Insulin Therapy", Dr. Douglas Robinson, Endocrinologist, was the presenter at the evening event that had 74 attendees.

CMSA Charlotte Metro Chapter was a Platinum sponsor for the Second Annual Case Manager/Social Worker Appreciation Luncheon for the Greater Charlotte Metro Area on Nov 2. The new display board was used to promote the Chapter, Member-get-a-Member Campaign, and the new website. The luncheon was sponsored by Senior Living Magazine, a periodical/tool used by many case managers in the area as a resource for discharge planning. There were approximately 250 attendees at the event.

Woodbridge, NJ

Through heavy rains, area flooding and traffic issues NJCMSA had its' November meeting. Medtronic Diabetes, Inc. presented 2.4 CEU's to about 100 attendees on "Diabetes and Intensive Management: Understanding the Conditions and Application of Continuous Glucose Monitoring and Insulin Pump Therapies." In addition, to the two presenters there were 7 exhibitors. The feedback from the session was very good.

As part of the continued follow-up on ways to distress, the chapter raffled off prizes that had a "spa theme" such as candles, music, and soaps. Rather appropriately, all attendees received a "rubber duckie" dressed in various Thanksgiving attire.

Wishes go out to all for a Happy Holiday!

Reno, NV

This has been an incredible month for Northern Nevada! The most talented committee to organize the first conference at the Nugget in Sparks on Oct 27. Several chapter members were presenters for the “Survival Skills for Case Managers” conference on relaxation and humor. The conference drew in attendees from over 80 miles away and everyone is eager for the next conference. The support from both local and national companies was outstanding! The raffle prizes were plentiful and much appreciated by recipients. Fourteen vendors had booths set up. The keynote speaker, Brian Crane from the Pickles strip, a nationally syndicated cartoonist, sold out of his entire stock of books. There will be more books for the next meeting so those who wanted them can have the opportunity to purchase. As always, the Nugget Resort did a fantastic job and the food was a success. Several requests have already been made for the presenters to speak at the next conference.

I must say our Treasurer was the main key to the success of the conference as she was on top of everything and very organized! Hats off to Mary Solomon our treasured treasurer. All that fun and we have thousands in the bank!

We will discuss how to improve for the next conference at the November meeting.

Hudson Valley, NY

Over the river and through the woods, to the Capital district we go! The Hudson Valley Chapter of CMSA made a successful journey to the NY Capital District on November 30 to host their northern New York partners in the Case Management profession. Held at the spectacular Desmond Hotel, they were fortunate to present the topic, “An Introduction to Prosthetics and Orthotics for the Case Manager”, sponsored by Hanger Orthotics. Case Managers and Social Workers from all settings attended this well-received session and had the opportunity to meet actual clients. It was a great opportunity to network, brainstorm, make new friends and recruit new chapter members. The chapter would like to extend a special thanks to Hanger Orthotics and their guest speakers for sponsoring this great evening.

The monthly chapter dinner meeting was held on November 8th at “Sam’s of Gedney Way”, in White Plains, New York. The topic, “The Case Manager as a Detective”, attended by a record breaking number of Case Managers, was insightful and a lot of fun. Presented by The CMO of Montefiore Medical Center and sponsored by Rich Tinger of A & J Care, the dinner was spectacular with gifts and raffles presented to a number of lucky case managers. The lucky winner of the monthly new member raffle received a basket of goodies in addition to a very warm welcome from all of the attendees!

The excitement never ends for the Hudson Valley Chapter of CMSA! In preparation for their holiday celebration on Dec 6, 2006, the chapter returns to “Sam’s of Gedney Way” for a spectacular dinner. Larry Gibbs, REMT-P of Air Trek Ambulance, will present the topic, “Principles of Air Medical Transport.” It should prove to be a fabulous meeting! And remember, CMSA members always attend HV-CMSA meetings free with advance paid registration!

For all future Hudson Valley CMSA events, check out their website at www.hvcmsa.org.

Long Island, NY

The Long Island chapter held it's annual fall evening conference Oct 18 at the Westbury Manor with over 115 attendees! Stefani Daniels, RN was the keynote speaker presenting, 'Demystifying Case Management' sparking lively interactive exchanges with the audience! Jim Snack presented 'The Magic of Change: Moving from Fear to Wonder', a captivating blend of magic and message. A variety of vendor’s educational presentations added to the diversity and scope of the offerings.

The Dec 6 meeting, to be held at the Huntington Hills Center for Rehabilitation and Nursing, will be a presentation by Dr Semel of St Charles Hospital on innovations in acute rehabilitation. The chapter board of

directors will meet Nov 15 to plan the 2007 calendar of events, begin nomination activities and evaluate the past year of activities and growth.

New York, NY

The CMSA-NYC Chapter has successfully started the schedule of chapter meetings in September, with the second annual dinner cruise to the Statue of Liberty and back. Cotherix provided an excellent program on Pulmonary Hypertension with an outstanding guest speaker. The program was followed by dessert and dancing to a DJ. What a fun way to network and add CCM's to your resume! This was the second annual cruise and registration was once again, sold out.

In October the chapter had a half-day conference entitled "Desperate Case Managers." Most of the CMSA-NYC Chapter members commute to work from outside the city. Past attempts to have people return to New York City on the weekend for an all-day conference were not well received. Additionally, many employers are either limiting or totally omitting financial reimbursement for educational meetings. The conference was held on a Wednesday and ran from 3 to 9:15 p.m., with an open exhibit hall. There was a panel discussion with representatives providing the managed care organization prospective, as well as the patient-focused hospital prospective. The dinner speaker covered issues that make case managers desperate, and ways to deal with stress. The closing speaker provided an overview of current legislation that is affecting case management. The conference was held at the Marriott Hotel at Times Square, a central location with reasonable access to public transportation. The primary goals of the CMSA-NYC Board of Directors were to make the conference available to our members at reasonable cost; to limit the amount of personal time off required for attendance; and to provide a significant number of CCM's/CEU's. All of the goals were accomplished, and the response from the attendees was overwhelmingly positive.

A mailing to the membership is being prepared to obtain updated email and telephone contact data, since most member communications are sent via email, with telephone outreach, as necessary. Many members list work contact data when they register with CMSA. So, when they change jobs, their contact data is no longer valid. The mailing will include a survey to solicit feedback on the best days of the week and times for future conferences, as well as suggested topics for future meetings.

On Dec 5, an attorney from Stony Brook University Medical Center will speak on *Healthcare and Legalities- New Laws Affecting You and Your Patients*. This meeting is the chapter holiday celebration. In addition to the presentation, the Board has planned a fun-filled evening for the membership, with holiday favors and numerous prizes to be won.

Chattanooga, TN

The Chattanooga Chapter celebrated National Case Management Week on Oct 10 featuring Kathleen Lambert RN, BSN, JD, Attorney at Law from Tucson, Arizona. Kathleen spoke on "*Values, Ethics and the Law for Case Managers*." She brought a sense of humor into the perspective of our personal and professional values, the principles, and characteristics of ethics and the "law" of the jungle for nurses and case managers.

The Chattanooga Chapter of Case Management had their November meeting Nov 14th. The speaker was Alyssa Swanson, BS, RN, CEDE, CCM (past president of the Chapter) who spoke on "*Understanding Insulin Resistance: Knowledge to 'Empower' Prevention of Type 2 Diabetes Mellitus*". The meeting was sponsored by Sarnoff-Adventism. The next meeting will be held on Dec 12.

Leadership Tips

WHAT IS NETWORKING?

network / n twerk *n. & v.* a group of people who exchange information, contacts, and experience for professional or social purposes. (The Oxford Dictionary)

Ask ten different people what networking is and you may get as many as ten different answers. A person's definition of networking probably depends upon their use of this important personal and professional activity. However, whether you network to make new friends, find a new job, develop your current career, explore new career options, obtain referrals or sales leads, or simply to broaden your professional horizons, it is important to focus on networking as an exchange of information, contacts or experience.

In any industry or career level networking helps you make connections in a personal way and build relationships of support and respect to discover and create mutual benefits.

NETWORKING "HOW TO'S"

- Start with a purpose. It does you no good to attend any networking function unless you define your objectives to know why you are there.
- The **nametag** is worn on the **right** side to provide an easy sight-line to your name when shaking hands.
- Have an effective handshake. This may appear obvious, but you have probably been on the receiving end of at least one "bone-crusher" and one "limp fish." Practice your handshake to avoid giving one of those yourself!
- Be sure to introduce yourself.
 - Say your name clearly. "Hello, my name is _____. It's a pleasure to meet you."
 - Shake hands
 - Use an "elevator" speech: described who you are or what you do in ten seconds or less.
 - When appropriate, offer a business card, and ask the other person for one of his or hers. Sometimes, it is more appropriate to exchange business card only when you depart from one another.
- Once the event is over, your networking does not stop! Be sure to follow up with the people that you have met, Keep in contact, share information, and offer to help in any way you can.
- Be sure to send a written acknowledgement or "Thank You" note to your networking contacts.

TIPS FOR WORKING A ROOM

In many networking events, you will find yourself with time to "mingle" among the other attendees before the formal program begins. It may be beneficial for you to spend some time planning and preparing how you will "work the room" to get the most from your efforts.

- Start with small talk
- Don't stay too long in one place. After eight to ten minutes, excuse yourself with a pleasantry such as, "It was nice meeting you..."
- Let preparation and practice be your guide. Spend some time planning your conversation generators.

TIPS FOR WORKING A TABLE


Many networking events will feature a meal if held during meal time hours. It is crucial to practice good table etiquette to make the best impression.

- Make the introductions. Proceed as if you are the host of the table.
- Sit and listen to learn. Start the conversations by asking questions: why people are there, what they hope to gain, how they found out about the event. Avoid monopolizing the conversation.

- Keep your business card handy. Do not deal them out impersonally.
- Practice good table etiquette. Let common sense and consideration of others be your guide.

Networking can be a fun and easy way to enrich your life, broaden your horizons, and enhance your career. However, it can also be potentially devastating if you act rudely, insensitively, or ignore the needs and desires of others. Remember, crucial to your success is that you treat networking as an exchange of ideas, information, and experience. You are not selling or simply telling or "sponging" off others for your own benefit only. Be generous in sharing your talents, experiences, and ideas, and always be respectful of those around you.

Good luck and have fun!



How to Organize a Membership Drive

- **Set Goals** - You should always set goals for any undertaking. Make sure they are attainable and measurable.
- **Develop a Good Organizational Plan** - Look at the area or office you want to recruit in, and make sure you have the resources you need. Determine who the non-members are and where they are located.
- **Develop a contact sheet to insure every non-member is contacted.** - Incentives for joining CMSA are a good idea, and you might want to offer free dinner during lunch and dinner meetings to entice non-members to come to you. Most districts set aside funds for membership in their budget. You can use that money to pay for incentives and refreshments.
- **Select Willing Recruiters** - It is very important to select members that can give their time to recruitment efforts and are dedicated to having a successful membership drive. Be sure you have enough recruiters to get the job done. Make sure they know their areas of responsibilities. Be sure to keep your recruiters informed.

The Approach

The best way to sell a CMSA membership is by asking a person face to face to join. Learn as much about a potential new member as you can. Ask how long he/she has been a state employee, what his/her position is, whether he/she has been a member previously, whether he/she has ever been asked to join before, what his/her family is like and what his/her interests are. All of these things help you to know a prospect's specific needs and how CMSA can assist them in addressing those needs.

The Presentation

Be confident and clear. Talk to prospective members on their level and be sure to answer any and all questions they may have.

What if the answer is YES?

Make sure new members have information about CMSA's member benefits. Let new members know they will receive membership cards and further information in the mail. Send their membership applications to the CMSA's national office. It is very important to keep in touch with new members. Remember that the recruiter has a responsibility to make sure new members are getting

What if they say they are undecided?

- Be prepared for objections.
- Listen carefully to what a prospect is saying.
- Rephrase the objection or show agreement with objection.
- Ask questions designed to discover the real concerns.
- Try to turn the objection to your advantage.

What if they say, "The price is not right."?

- Turn the purchase into an investment, not an expense. (Talk about the benefits, legislative gains, savings through group buying discounts, and scholarship opportunities.)

- Make it smaller (one soft drink a week, pennies a day, etc.).
- Compare our cost to other organizations
- Compare results (review legislative gains for the last five years, savings available (Conference Discounts, merchandise.)

What if they say, "I want to think about it."?

This is probably the toughest answer recruiters have to deal with. Remember this may just be another way of saying no, or they may truly want some time.

- Determine what the concerns are.
- Reaffirm the need for being a member of CMSA.
- Set a time to meet with them again and hold them to it.

What if the answer is NO?

- Determine why they said no.
- Offer additional information.
- Try again later.
- Let someone else try.

Information was adapted from: <http://www.seanc.org/site//index.cfm?fuseaction=page&filename=tips.html>

ADVOCACY & POLICY

What is Advocacy?

We often toss around the term "advocacy" as if we all had a clear understanding of what is meant by the term or what it means to "do advocacy." Particularly in a group of self-proclaimed "advocates" or among folks who consider themselves professionals in the field, little attention is paid to defining the term, as if everyone meant exactly the same thing; as if all advocates fought for the same cause or pursued the same results.

And while advocacy is a relatively simple activity, the term often carries with it a certain mystique. Sometimes we think that it must take something extra special to do this thing called advocacy and that, whatever it is, we must certainly lack that which is required to do it.

In actuality, advocacy is as basic as breathing.

The word itself comes from the root vocare: to call. Webster gives us a fine place to start when defining "the advocate:"

1. a person who pleads another's, or one's own, cause
2. a person who speaks or writes in support of something

Advocates call for justice, fairness, equality, more or less of something. They explain, translate, convince, argue, articulate, remind and direct change in thought, policy and action.

"Advocacy is the EDUCATIONAL process through which data, EXPERIENCES and insight are shared with those who craft PUBLIC POLICY so that they may make informed decisions.

What is Policy?

Policies have three things in common:

1. **Policy is Written:** This is particularly true regarding public policy. Policies must be written down. They may not exist in a clear and concise "policy statement," but policies can be discerned from rules, laws, guidelines and regulations.
2. **Policy is Approved by Legitimate Authority:** In a family, the "legitimate authority" is most likely one or both parents. For a corporation or a nonprofit, it's usually the board of directors. The "legitimate authority" for local, state, and federal government is divided between elected and appointed officials in administrative, legislative, and judicial branches. They approve policies, though citizens can have substantial input in creating them.
3. **Policy is a Guide to for Further Action:** Policies determine a general direction or course. For example, if the leaders of a local Housing Authority set a policy to refrain from constructing new affordable housing units, most of their activity may be directed toward the construction of "market rate" units or the rehabilitation of existing structures. When we want an institution or a government to follow a different course, we advocate for a change in policy direction.

Who Makes Policy?

In order to know where to most effectively direct educational advocacy efforts, it is important to understand how public policy is made. At all levels of government the basic policy responsibilities are divided into:

1. **legislative policy** that sets parameters for funding authority and goals for legislation;
2. **administrative policy** that sets regulations and guidelines once laws are made; and
3. **judicial policy** that interprets legislative and administrative actions.
- 4.

The legislative responsibility at the federal level lies with Congress. At other levels of government the title of the legislative body may vary, but in general,

- the equivalent at the **state level** would be the **State Legislature**,
- at the **county level** the **County Commission**, and
- at the **city or municipal level** the **City Council**.

Each level of government also has its executive/administrative branch including the elected leader (President, Governor, Mayor, etc.) and appointed or employed administrative staff.

Why is it important to understand these distinctions?

- Different policy is determined at different levels.
- Asking the executive branch to change legislative policies may not only waste energy, but could alienate potential friends and supporters.
- Directing requests to the legislative branch for changes in specific regulations that were determined administratively, rather than legislatively, can also be unproductive. Advocacy should consist of educational efforts judiciously directed to the people who have influence over the decisions and policies in question.

It also helps to know that **those who work for the legislative and executive leaders** often have a great deal of influence on how policy is made, especially with regard to how policies and legislation are written. **Developing good working relationships with legislative aides or administrative staff can be a very productive use of time.**

DIRECT INTERACTION: In terms of direct interaction with policy-makers, there are several strategies useful for individual case managers.

- **Don't Wait - Start Now:** A basic principle from the "friendraising" approach is that you should not wait until there is a problem or even a particular issue to address before getting to know your legislators or the appropriate administrators at all levels of government.
- **Schedule a Visit:** An introductory visit just to let the person know about your project - what services you provide, where you provide them, who your clients are, etc. - will lay the foundation ahead of time for a helpful response when you need to contact the person regarding a particular problem or issue.
- **Issue an Invitation:** Even more effective than visiting the policy-maker's office is inviting that person to tour your project. Seeing first-hand what you do will leave a stronger impression than even the most compelling fact sheet or beautiful brochure.
- **Subsequent contact** with a policy-maker's office may then be either in person - group visits from staff, clients and board members are effective with legislators - or through phone calls, letters or faxes. Some of this contact may be the result of an individual project's issues, or in response to action alerts sent out by local, state or national advocacy groups.
- **Develop a System:** With regard to the latter, it is helpful to have some kind of network in place for responding quickly to such alerts. Phone trees, fax trees, etc. are common approaches to moving the information quickly and allowing for a rapid response to breaking issues.
- **Testify:** Case managers may also be asked to provide their expertise during the legislative or rule-making process. This could entail testifying in front of a legislative committee or at a regulatory hearing.
- **Draft Legislation:** If you have a good working relationship with legislative or administrative staff, you may even be asked to assist with drafting legislation or regulations, or to review and comment on drafts before release.

Adapted from National Health Care for Homeless Council 'State and Local Advocacy Manual' located at www.nhchc.org.