

THE CHAPTER DISPATCH

October 2006

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AT A GLANCE – Important Dates

2006 CALENDAR

Oct 31 National Board Nominations Deadline

Sept 1 – Nov 30 Member-Get-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

2006 National Case Management Week!

Hope that everyone had a successful and rewarding Case Management Week! We'd love to share your hard work with others. Please forward any information, photos, etc... to njackson@acminet.com.

One Purpose



Your Chapter's CM Week Checklist:

October:

- Let us know if you received a state or city proclamation!
- Send** National a picture of your chapter receiving their Proclamation from your politicians.
- Send** highlights of your events and activities to the National Office to share the success of your celebrations with others in newsletters and online.

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 a 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!

Time Frame for Contest
September 1 - November 30, 2006

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

Educational Resource Library Updates

If you have not yet explored and taken advantage of CMSA's Educational Resource Library, you need to set up your web Profile today and get started. There are a lot of free CE Courses and additional resources on diseases to help both the case manager and the consumer. This benefit alone can justify your membership fees!

ADHERENCE:

Three adherence courses are available to you on the ERL. Go to the "Educational Library" heading to find these topics and many more:

- o [Motivational Interviewing — Improving Adherence Through Health Behavior Change](#)
- o [Medication Non-adherence & CMAG: The Guidelines to Combat the Epidemic](#)

- o **Medication Non-adherence Case Study, Interventions for the Special Populations & Tools to Manage Within the Care Management Plan**



HURRICANE PREPAREDNESS:

Click here [OneStorm™](#) to create a hurricane preparedness plan for your family with [OneStorm™](#), a website dedicated to the mission of educating and preparing families and businesses for dealing with severe weather situations. After the tragic results of last year's hurricane season, disaster management and meteorological professionals are calling for an increase in preparedness.

This year is already predicted to be filled with severe weather, producing a number of violent storms. The perfect time for your family to review your hurricane plan and make changes as necessary is before hurricane season begins. Waiting until the last minute is never the choice to make. "Hurricane Preparedness" is also located in the ERL under "Solution Centers" <http://cmsa.onestorm.org/>.

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. The ERL supports a commitment to professional continuing education by offering topics ranging from healthcare-related courses to "Buying a Home," "Fitness," "Emotional Wellbeing," and many more. CMSA is dedicated to equipping you for success in all areas of your life. Check out the [ERL](#) today!

ANCC Nursing Case Management Certification



THE ONLY ACCREDITED NURSING CASE MANAGEMENT CERTIFICATION.

Background on ANCC and Nursing Certification in Case Management

The ANA Certification Program was established by the American Nurses Association (ANA) in 1973 to provide professional achievement recognition in defined functional or clinical areas of nursing.

The American Nurses Credentialing Center (ANCC), incorporated in 1991 as a subsidiary of the American Nurses Association, is the largest nursing credentialing organization in the United States. ANCC's professional certification services provide national and international recognition for nurses who have proven themselves through education, experience, knowledge, testing and professional conduct. The ANCC Commission on Certification offers approximately 35 examinations including an exam for nurse case managers.

Eligibility for Case Management Certification Exam

To be eligible to take the exam a registered nurse must:

- hold a current, active unrestricted RN license in the United States or its territories, or the professional, legally recognized equivalent in another country.
- have practiced the equivalent of two years full time as a registered nurse.
- have a minimum of 2,000 hours of clinical practice in case management within the last two years.
- have completed 30 hours of continuing education in case management within the last three years.

Exam Dates and Application Deadline

The Nursing Case Management exam (exam #30) is a paper/pencil (P&P) exam and is offered in May and October each year. The next available date to sit the exam is May 19, 2007.

Application Fees and Discounts

The regular application fee is \$ 320.00 and the rate for American Nurses Association (ANA) members is \$180.00.

ANCC or CCM? What's the difference?

Both ANCC and CCMC offer well-respected certifications in case management. However, only ANCC's Nursing Case Management Certification was developed for nurses, by nurses, and focused specially on nursing case management. The Test Content Outline of the ANCC Nursing Case Management Certification is focused on the role that nursing case managers play in the modern health care system. This can be substantially different than that played by other certified case managers such as social workers and non-nurse managers. ANCC encourages all case management certification candidates to compare the content of the ANCC exam and the CCM exam. More and more nurses are realizing that nursing case managers play a unique role that is best reflected by the most highly respected name in nursing credentialing for over 30 years: ANCC! ANCC certifies more nurses than any other certification body and is the home of the renowned Magnet Recognition Program.

For detailed information about the application process or to download an application you may go to the ANCC web-site at www.nursecredentialing.org. The catalog you need for [Case Management Certification](#) is the [Specialty Nursing Catalog](#). Customer Service representatives are available at (800) 284-2378, between 9:00 and 5:00 Eastern time, to answer your questions.

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 they are housed by an outside vendor. If you have any questions, please contact Member Services.

CMSA National Board Nominations – Deadline Oct 31

MEET ... SERVE ... GROW... MAKE A DIFFERENCE!
Begin Your Adventure to Become a 2007-'08 Board Member.

It's easy to get things started ... simply click on the CMSA nominations form [link](#) at www.cmsa.org under Your Career, then return your completed forms to the CMSA National Office by October 31.

Serving on the CMSA Board of Directors is your opportunity to get involved with your professional case management organization on a national level. As you may know, CMSA is an international not-for-profit Section 501(c)(6) professional society governed by an elected Board supported by appointed task forces and staffed by a professional association management company. And as a leading organization for case management professionals, CMSA prides itself on seeking dedicated and qualified future leaders to serve each year as officers or directors.

Upon being elected, you'll have the chance to meet interesting people, gain valuable leadership experience, and be a part of something worthwhile. Why not consider giving your fellow case managers the chance to benefit from your leadership abilities and people skills ... you'll not only allow yourself the opportunity to increase your networking and to take on new challenges, you'll be helping the case/care management field increase in value and growth!

Read what other CMSA officers have said about their personal experiences on the National Board:

"To serve my fellow members has fulfilled my professional dream of success and allowed me to give back to the organization which gave so much to my professional life and to me." Susan Rogers, RN, BSN, CCM, CMSA Immediate Past President

"As President of my local CMSA chapter in Houston, I got the opportunity to meet the Board at our annual conference. They were such strong mentors for me, and they always encouraged me to take the bigger step and help make CMSA a better organization. It was by their example that I was motivated to run for office." Claire Lauzon-Vallone, RN, MBA, CCM, CMSA Secretary 2005-'06; CMSA Houston Past President 2003-'04

"Being on the CMSA Board has brought me lifelong memories and friends and a level of professional growth that I never could have achieved on my own." Sherry Aliotta, RN, BSN, CCM, CMSA Past President 2004-'05

If you're interested in a national position or know of someone who would make an excellent leader, mail or fax each of the completed forms you'll find included in CMSA's *2007 National Election Nomination Packet* located online at www.cmsa.org, under Career. Or contact RVDB@acminet.com for more information.

Deadline is OCTOBER 31, 2006!

CHAPTER REMINDERS

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!

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!**

Chapter Officer Updates

Thank you to those chapters that have submitted your officer update information as requested. Many chapters still have to undergo elections for the new term; however there are still some chapters that do not have contact information because the terms have expired. 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.

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 an 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.

LETTER FROM YOUR CPC REP



Hello Everyone!

Greetings Chapter Leaders and Members,

The Board is getting ready to meet in Washington, D.C. next week. As CMSA's National President, Connie Commander highlighted in the September/October issue of **The Case Manager** in the President's newsletter, it is a "beginning". Through the efforts of the CMSA Leadership and the Legislative Committee Chair, Peg Leonard, the board will be having meetings "on the hill" with key legislators. It is the hope that key talking points will be developed which will include CMSA is and what case managers do and can do for their clients/patients.

Aside from her Message, Connie is also asking for help through the CPC forum to reach out to government leaders both local and state to spread the word about CMSA beyond National Case Management Week. Please let the board know what your chapter is doing at the chapter level to raise awareness about CMSA and the need for inclusion at the healthcare leadership table. Ask the local chapter membership for their observations &/or perceptions about what they see as the biggest issues that they face in their roles as case managers as well as the issues for their clients. Please include any suggestions that they may share.

CMSA is committed to meeting the 10,000 member mark by the end of the year. As of July 31, there was 9,648 members. To that end, please participate in the "**Member-Get A- Member**" campaign which is currently running. A stronger organization can only serve to enhance our society's mission and provide the board with new opportunities both now and in the future. For details, visit the CMSA Member Recruitment page at <http://www.cmsa.org/Membership Recruitment/>.

Pictures from the National Case Management Conference in Dallas from June are on the organization's web site as well as in the recent issue of **The Case Manager**. Please take the opportunity to share them and talk about the experience. Look forward to plans for the Denver 2007 Conference.

Hope every chapter had an opportunity to celebrate during **National Case Management Week**. If your chapter hosted an educational program and/or celebration, secured state Proclamations, recognized chapter members please share with others how the event was celebrated.

Best wishes to all Chapter affiliates and Members for National Case Management Week! Thank You!

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 Chapter.

Official CMSA Chapters

Chicago, IL

In celebration of Case Management Week-members were free to attend the chapters monthly dinner meeting on Oct 10, 5:00-8:00p, at Mon Ami Gabi/Oakbrook. Topic presentation: *Current Approaches in Chronic Pain Management* Sponsored by: Medtronics. Each participant received Bath & Body Work Products & coffee mugs.

CMSA Chicago received a mayoral proclamation from Mayor Richard M. Daley proclaiming Oct 8-14 to be the National Case Management Week in Chicago. This proclamation was prominently displayed at the Oct 10 dinner meeting.

Fort Wayne, IN

The Fort Wayne Chapter of CMSA had its fall conference on Sept 12th titled *New Trends in Oncology Care*. Suzanne Lindley a colon cancer survivor and patient advocate who has appeared on National TV was the keynote speaker. Douglas J. Schwartzentruber MD, FACS Goshen Hospital Comprehensive Cancer Care Center and Dr. Marc Apple with Radiology Oncology Associates explained the new diagnostics, surgical, and radiological treatment advances available today. Leslie Anne Edgar RN, MSN, NP Fort Wayne Medical Oncology & Hematology provided us with new study and medical oncology research and that is being offered to cancer patients. The group walked away impressed by the attitude, stamina, fortitude, and calmness of the cancer survivor. The medical update will be invaluable to healthcare providers and family members. The conference was held at the new Landmark Conference & Reception Centre just off I-69. Vendors supported the conference with Indiana Physical Therapy being the sponsor for this event. Attendance was around 50 with a wonderful Italian buffet served for lunch.

The Fort Wayne Chapter of CMSA Case Management week celebration was hosted and sponsored by Coram Healthcare on Oct 10 from 5:30-7:00p at their office in Fort Wayne, IN. In Dec. there will be a celebration for holidays with the annual Holiday Gifts & Gathering which is open to all CMSA members and their CM guests on Dec 4, 5:00-7:00p at Summit Club North Room sponsored by Angel Corps, First Call Medical Staffing, Home Nursing Services, and Dorian Maples & Associates.

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. Dr Sue weaves together, with a fresh approach, 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 Sep 20, 2006 Annual Meeting. They are all very excited to plan the growth of Central IN CMSA.

Springfield, MO

Plans are final for the CMSA of Springfield and the Greater Ozarks annual seminar is called "Brainstorming" (about head injuries, such as by a CVA or TBI). It will be held on Nov 4 at the Oasis Convention Center. A block of rooms at poolside have been reserved for attendees at a special price. On the evening of Nov 3, a vendor fair will be held. Appetizers will be served along with an acoustic band.

Piedmont, NC

The Piedmont Triad CMSA-NC along with the Charlotte Metro Chapter was very pleased with the participation and success of the recent conference on Sep 21-22, 2006 at the Winston-Salem Marriott. The theme was *Case Management: Delivering the Magic*. Around 85 participants from many diverse areas of case management joined together to network, share resources, and learn some magic from a wonderful group of Health Care leaders/speakers. Connie Sunderhaus, RN, BA, CCM was the keynote speaker who shared news from National and spoke to the many benefits of CMSA membership. Healthcare accomplishments (and the lack of) in the 109th Congress were addressed by Joanne Ruhland, MBA, Vice President of Government Relations for Wake Forest University Baptist Medical Center. It was very good to have the support from 30 vendors who educated the attendees on their products and services.

Woodbridge, NJ

In September, NJCMSA resumed its' monthly meetings. In an effort to provide the membership with topics that aim to reduce stress and improve "quality of life", the chapter is focusing on case managers themselves over the next few programs with a goal to *De-Stress While You Learn*.

From a recent article in "Case In Point", Frederic Luskin, Ph.D. spoke to 115 attendees on *Forgive For Good: A Proven Prescription for Health and Happiness*. Dr. Luskin discussed the process of grievance and forgiveness; their core components and the relation to the case manager's professional role. In addition, he provided the audience with techniques for self-change both personally and professionally. The response to this program was overwhelming. Attendees found Dr. Luskin "motivating"; "original"; "one of the best ever". The Chapter highly recommends him.

In October with a 135 attendees, the topic was *Mediation Skills for the Healthcare Professional* presented by Mr. Armand Bucci of HealthSouth both long-time supporters of the chapter. The focus was on skills for active listening, communication and problem-solving. The development of these skills can help case managers adhere to Chapter 9 of the CMAG-1 Guidelines, *Motivational Interviewing and Health Behavior Change*. It was a fun evening to celebrate Case Management Week. The chapter had Proclamations from the Governor and a State Senator. In addition to exhibitor raffles, the chapter raffled 10 books all with a varied focus on reducing stress. Two of these included a copy of each of Dr. Luskins' books.

The chapter has been fortunate to have between 6-12 exhibitors/sponsors per program. In an effort to "give back" to the community, the chapter began a monthly outreach program in October. The first company was the local chapter of the American Diabetes Association for which an exhibitor table was donated to the organization which included two dinners. This was a wonderful opportunity to exchange information and network.

Las Vegas, NV

Case Management Association of Las Vegas initiated a "full court press" membership committee since the affiliation with CMSA was official. The membership campaign was in effect from July-Sept, the chapter has been very successful and is proud to report 35 official members at last count and still growing!! Free CMSA pins were offered with every membership. Who would have known those pins would be such a great incentive? The September educational forum held on Sept 19 focused on "Motivational Interviewing" and was well attended. The guest speakers were affiliated with the Rio Grande CMSA Chapter and they did a superb job with this timely topic. A sub-committee is working on drafting the business plan for 2007 while others are networking to identify those interested in running for Board and committee positions. Also a few elves in the

workshop putting together a holiday celebration for the members and colleagues that will occur sometime in late November where highlights of the business plan will be discussed and the results of the election will be announced. Stay Tuned.....for CMA-LV has just begun to make a difference in the Las Vegas market place!!!!!!

Reno, NV

The Northern Nevada Chapter would like to invite you to join them at their *Survival Skills for Case Managers* program Friday Oct 27, 2006 from 7:30a-4:30p. One unifying characteristic that all case managers share, not matter what the chosen path. Case mangers seem to have a more difficult time caring for themselves. The goal of this program is to assist case managers to find room in life for both tears and laughter. The Keynote speaker Brian Crain, creator and author of the Nationally Syndicated “Pickles Comic Strip”, will be sure to bring some laughter to the event. Each attendee will receive 6 CCM credits and a “Survival Kit” for continued success.

Hudson Valley, NY

Hudson Valley Chapter’s monthly dinner meeting is scheduled for Nov 8 at “Sam’s of Gedney Way”, in White Plains, NY. The topic, *The Case Manager as a Detective*, will be presented by The CMO of Montefiore Medical Center and is sponsored by Rich Tinger of A & J Care. CMSA members always attend meetings free with advance registration!

Facilitating outreach and increasing membership both for National CMSA and the Hudson Valley chapter continues to be a priority as plans for hosting a much requested dinner meeting in the Albany area are already set for the fall. The topic, *An Introduction to Prosthetics and Orthotics for the Case Manager*, sponsored by Hanger, will be held on Nov 30. The chapter hopes that many Hudson Valley Chapter members are able to make plans to accompany the Hudson Valley board in meeting and welcoming the northern New York partners in the case management profession!

Long Island, NY

The Long Island chapter's annual conference this year featured nationally known author Stefani Daniels, RN as the keynote speaker. The conference was entitled *Demystifying Case Management*. Jim Snack, a well known motivational speaker will give the presentation *The Magic of Change*. The conference was held at the beautiful Westbury Manor on Oct.18 from 4:00-9:00p. Check the website www.cmsali.org later in the month for photos!

The chapter continues to grow. Six case managers joined the organization at the Sept. meeting. New members received the CMSA pin as the chapter's gift to new members. The chapter's 10 year anniversary was recognized at the national conference during the leadership seminar. The historical committee is compiling a scrap book to celebrate the first ten years of their chapter. It will be on display at the meetings.

New York City, NY

CMSA-NYC started off with a cruise on the Hudson, from Chelsea Piers to The Statue of Liberty. The cruise was sponsored by Cotherix. The presentation on Pulmonary Hypertension, during dinner, was outstanding. All the attendees were on deck to get a glimpse The Statue of Liberty. The group later retired to the lower deck for dancing to a DJ, dessert and the presentation of prizes. It was fun to mix and mingle a great time was had by all.

On Oct. 11, CMSA-NYC presented a half-day conference, *Desperate Case Managers*. Topics included a debate on *The Desperation of Denials*, between an MCO representative and a hospital representative, *Soothing the Case Manager and a Review of Legislative Issues Impacting Case Management*. The chapter was celebrating Case Management Week by providing a variety of prizes at the conference and giving each of the chapters members a lovely umbrella with the CMSA-NYC logo. Look forward to Metro New York Chapters’ Holiday Celebration, which is in the final stages of planning.

Dallas, TX

The Dallas/Fort Worth Chapter year has started off with a bang! Over 75 people attended the first dinner of the chapter year in Sept. Then on Oct. 4, Regency Hospital sponsored an all day CCM Prep Class offered during the Annual Fall Seminar. The following day almost 100 people attended the 2 track seminar. Worker's Comp & Hospital Case Management were the tracks for the all day event. The Annual Fall Seminar, produced by the Strategic Planning Committee, targets non-member case managers in north Texas as well as those considering a career in case management.

The Strategic Planning Committee is busy planning the 3rd Annual Invitations Leadership Retreat to be held in April 2007. Invitations this year will go to new & pending chapters as well as case management groups considering CMSA affiliation. This annual event has received national honors and is always a fun & informative experience!

The Community Liaison Committee is recruiting volunteers to participate in the upcoming 16th Annual Walk to Cure Diabetes in Nov. Volunteers can walk or act as walker supporters. The Chapter is also sponsoring Julie Carroll, past president, as she walks in the Avon Walk for the Cure. A 60 mile, 3 day walk from Ft Worth to Dallas. Good luck, Julie!

Leadership Tips

TIP # 1 - PRIORITIZING YOUR TIME

Good leaders seem to always be able to “get things done.” Ever wonder how they do that? The skill they have most likely mastered is the skill of prioritizing. Here’s a suggestion to help you improve in this area. Write out your “to do list” and then re- write it in the following order suggested by author Steven Covey and then tackle that list!

- Important and urgent
- Important, but not urgent
- Urgent, but not important
- Not urgent and not important

TIP #2 - MOTIVATING YOUR MEMBERS

Ever wonder why people drop out of your club or organization? Often it is due to discrepancies in their understanding of the mission of the group, lack of appreciation, or poor leadership. Here are some suggestions to always keep in mind:

- Study members and determine what makes each one tick
- Be considerate
- Give credit where credit is due
- Show your members you have confidence in them and that you expect them to do their very best
- Ask members for their counsel and help
- If an idea is adopted, tell the originator why
- Give members a chance to take part in decisions, particularly those affecting them

TIP #3 - EFFECTIVE EVENT PLANNING

It's important to be "planful" when putting events together. Below are some suggested things to keep in mind as you plan.

- What are the needs of your target audience?
- What are the goals of your program ... what do you want them to get out of attending?
- Outline what you want to happen during the event.
- Proposed Budget: How much money do we need? Where will the funds come from?
- Contact & schedule guest speakers, performers, etc.
- Reserve rooms & equipment and arrange for set- up & clean-up volunteers.
- Staffing: Do we need someone to work registration, entrances, refreshments, support speakers?
- Create a publicity & marketing plan for your event.
- Program evaluation and thank you notes after the event.

TIP #4 - SETTING GOALS

Goal setting is an important objective for every leader of a group or organization. Here are some tips on goal setting:

- Visualize what you want the desired outcome to be.
- Write goals down. It is important to put your goals on paper so you can see them, remember them, and refer to them.
- Set smaller goals within the larger one. These will act as checkpoints along the way to success.
- Set target dates to help keep you committed to your time line and focused on your goals.
- Make sure that your goal is high enough to challenge you. Different people will have
- Make your actions support your goal.
- Review and continually update you goals. It's OK to change your goals.
- Celebrate and reward your success!!

TIP # 5 – ENCOURAGE BRAINSTORMING

- No criticism, evaluation, judgment, or defense of ideas during the brainstorming session.
- No limit on "wild" ideas, no matter how outrageous or impractical they seem. Every idea is to be expressed.
- Quantity is more desirable than quality.
- "Piggybacking"- building on ideas - is encouraged.
- Everyone must be encouraged to participate.
- Record all ideas - i.e.: on a piece of flipchart paper.
- Choose "top 5 ideas" - combine similar ideas when appropriate.
- Individually rank ideas.
- Decide, as a group, which idea will be enacted first.
- Begin the brainstorming process again as necessary.

TIP #6 - PROJECT A SUCCESSFUL LEADERSHIP IMAGE

1. Don't make commitments that you can't keep. Follow through is important. It lets people know that you are responsible and dependable.
2. Do your homework! Always verify information before passing it on. (The passing of unverified information is called "spreading rumors")!
3. When you have received assistance from someone, it is important to acknowledge their help in the appropriate forum(s). A little "thank you" goes a long way.
4. Conduct a personal "attitude check". Are you helpful, pleasant, positive? Remember, leadership sets the organizations climate.

Information adapted from http://www.ncsu.edu/csleps/leadership/leadership_tips.htm

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.