

# Chapter *Dispatch*

WWW.CMSA.ORG FEB 2011

## 21st Annual Conference

Registration is Now Open for CMSA's 21st Annual Conference & Expo

The topics are HOT ... And CMSA's 21st Annual Conference & Expo will be so COOL!

Make plans now to take advantage of all of the inspiring educational, networking, and opportunities at the leading case management conference event in the nation — **SAN ANTONIO 2011**. Visit [www.cmsa.org/conference](http://www.cmsa.org/conference) to learn about the CEs, sessions, keynote speakers, opening night event at Knibbe Ranch, Annual Meeting, and so much more waiting for you in the Lone Star State. Register early to ensure you get all the sessions you want. And don't forget to enter our fun online **Trivia Quiz to win one of the great prizes!**

**Hurry!**  
Early Bird  
Discount Ends  
March 31

## Spring Member Get-A-Member



The 2011 Spring Member-Get-A-Member Membership began **February 1, 2011 and will run through April 30, 2011**. As of right now we have **31 new recruits**. Recruiting new members is an opportunity to share your enthusiasm and excitement for your organization with non-members. If you are excited, it will be contagious and others

will want to join CMSA. Tell them about all of the wonderful benefits of being a CMSA Member.

You'll find several tools at [www.cmsa.org/recruit](http://www.cmsa.org/recruit) to assist in your recruiting efforts. Don't forget to make sure your name is included on the new members application in order to receive credit for recruiting.

All recruiters will receive recognition for their new members. The prizes are as follows:

- **FIRST RECRUIT:** A CMSA Member pin
- **EACH RECRUIT:** A \$5 CMSA coupon for each person recruited
- **FIVE OR MORE RECRUITS:** One free year of CMSA membership
- **TOP RECRUITER:** A complimentary 2011 San Antonio conference registration.

## Chapter Leader Call

**April 13, 2010 2:00 p.m. CST.**

Join CPC Representative Connie Keene and CMI's staff on this month's Chapter leader call. The Topic will be **CMSA's Annual Conference and Chapter Leadership Workshop**. On this call we will discuss the chapter leadership workshop, chapter leader mixer, CPC meeting, and the other highlights of the up coming conference in San Antonio. The call in information is: **Conference Number: 1-218-632-3026, Passcode: 373967#**

# Public Policy Summit



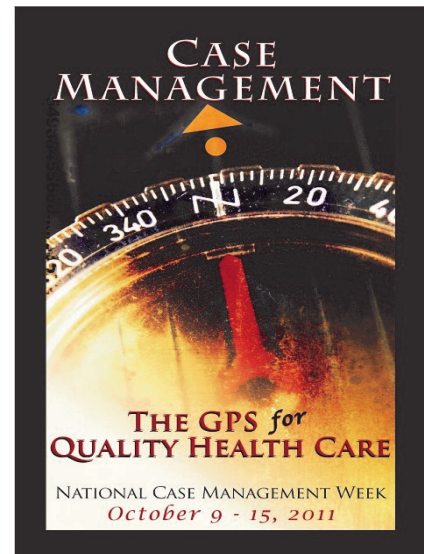
On **April 5-6, 2011**, fellow case management professionals from across the country will visit Washington, DC to educate Congress on the importance of case management to the effective delivery of health care. This Summit teaches case managers how to use their local grassroots networks for legislative success and network with CMSA's Public Policy leaders.

The event is open to all CMSA members, staff, volunteers, and case management professionals who are passionate about association issues and want to make a difference by meeting and networking with fellow advocates from across the country.

The Summit Fee is \$299 plus an additional \$25 if you want to attend the optional Tuesday evening Reception. Visit [www.CMSA.org/PolicySummit](http://www.CMSA.org/PolicySummit) to register today or to get more information. **Have questions about the event?** Contact CMSA's Government Relations Department at [policy@cmsa.org](mailto:policy@cmsa.org).

## CM Week 2011

And the winner is.... **Brenda Kitchens** of the Central Virginia Chapter. Her slogan, **Case Management-The GPS for Quality Health Care**, was chosen the amongst the 53 entries for the 2011 CM Week Slogan Contest. It was a tough competition but the decision was unanimous. Congratulations Brenda! Your slogan will be used for all of the various promotional products that will be used to get the word out about Case Management. Remember **CM Week is October 9-15**, start planning your event soon!



## Chapter Dues Direct Deposit



The Direct Deposit feature for the chapter dues has finally been activated. Your chapter should have either received your chapter dues for February 2011 either Tuesday or Wednesday of this week. From now on chapter dues will be going in your chapters accounts on or around the 20<sup>th</sup> of each month. If you haven't received anything in your account from CMSA please contact Tonia Salas [tsalas@cm-innovators.com](mailto:tsalas@cm-innovators.com).

# Using the Chapter Portal

Some of you are already accessing the new tool to download your own membership lists, the new/renewing, current, and expired/expiring. All Presidents, Pres. Elects, VP's, membership chairs, secretaries, executive directors, and treasures are now chapter administrator's and can access the reports in the chapter portal.

Please view the screens below for directions. It is important that you and your fellow chapter leaders utilize this tool for your chapters convenience. **National does not send out the chapter roster, the dues remittance reports and the other various reports on a monthly basis.**

The image displays two screenshots of the CMSA website. The top screenshot shows the main homepage with a 'Member Login' field and a 'GO' button. A green arrow points from the 'Chapters' section to the 'Log into the chapter Portal' callout. The bottom screenshot shows the 'Chapter Portal' page with a 'Login to Portal' button and a menu of options. A green arrow points from the 'Log into the chapter Portal' callout to the 'Login to Portal' button. Another green arrow points from the 'Chapter Dues - Individuals' menu item to the 'These are dues remittance reports that used to be included with the chapter dues checks.' callout.

**Log into the chapter Portal**

**These are dues remittance reports that used to be included with the chapter dues checks.**

**Once you are logged in this menu screen should appear.**

- [Renew/Pay Open Invoices](#)
- [My Profile](#)
- [Update Username/Password](#)
- [Communication Preferences](#)
- [Maintain Bio](#)
- [Invoice History](#)
- [Event Calendar and Registration](#)
- [Membership Directory](#)
- [Chapter Dues - Individuals](#)
- [Chapter Dues - Company Individuals](#)
- [New/Renew Membership Roster](#)  
Retrieves all new and renewing members (including company and corporate individuals) by date and chapter.
- [Expiring Members Report](#)  
Retrieves all members (direct and inherited) whose membership expires in a given date range.
- [Current Member Roster by Chapter](#)  
Generates report with active members (individual and group).

If you do not see these options on the menu screen when you log-in either you have not been selected as a chapter administrator or, your officer listing for your chapter has expired in our database and needs to be updated. Please send an email to [njackson@cm-innovators.com](mailto:njackson@cm-innovators.com) if you are experiencing any of these problems.

# Developing a Useful Budget

How does your organization decide where to spend its money? The decisions you make are a reflection of your collective values, habit and compromise. Developing a budget for your organization helps to ensure that your spending is based on conscious intention, and that you stay on track to meet your goals.

## The Vision

Before you even start trying to put numbers to paper, you will want to make sure that your Board agrees on common goals. Have those hard conversations first. This is the time to schedule a retreat with your board members, whether that means a weekend at a beachside resort or Saturday morning in the school library. Be prepared to deal with big issues. And how about surveying your membership? This can be as simple or elaborate as you please, and helps you to stay in touch with the people whose interests you are serving.

## Which services are you committed to providing?

Now that you are in agreement about your goals, identify the key activities and programs you will spend money on, as well as administrative expenses that arise each year. Examine what your group actually spent in each of these areas over the last year or two, and come up with an estimate of how much you need for the upcoming year. Providing sub-totals for each area can be very informative. And if your group has fallen into a pattern of just using last year's budget numbers again - try something new this year - look at what was actually spent!

## Set some money aside.

Your next step is to "reserve" some money for carry over to the next year. How much is right for your organization? If you plan your major fundraising activities early in your financial year, you can get by with less carry over. But if you have major financial commitments each year, you will want to ensure that you have a reserve sufficient to meet these, just in case your fundraisers don't do as well as planned.

## Where's the money coming from?

Get a total of how much you need to raise and be clear about how you plan to do it. What are the ways your organization has raised money in the past? Go through the same exercise: look at your income over the last year or two including membership fees and fundraisers. What will you repeat? What was successful? What's not working? What's realistic? And please remember that money isn't the only thing to measure here. How many volunteer hours will each activity take? Is it worth it for the return?

## Behold, the balancing act...

Look at the two lists: income and expenses. If your expenses outweigh your income, you probably know the two alternatives: cut back on your expenses or increase your income. Which will better serve your membership? Can you add another fundraiser? Should you eliminate or reduce the scope of a particular activity? Request more volunteer time or effort? If your income outweighs your expenses, you also have decisions to make. Do you cut back on fundraising and give your volunteers a break? Or do you raise the bar and provide even more services this year?

For general guidance on how to make the job of treasurer easier, download "**Treasurer's Compass** Best Practices, Checklists & Procedures for the Volunteer Treasurer". Visit [www.MoneyMinder.biz](http://www.MoneyMinder.biz)



We have had so many changes with the new year and I would like to make sure that all of the CMSA chapters have been updated. So, please see the topics below and ensure that your chapter has followed through:

- “Officer Update form should be submitted to Nikki Jackson at [Njackson@cm-innovators.com](mailto:Njackson@cm-innovators.com)
- All chapter president’s sign up for the CPC Yahoo Groups to converse with other chapter presidents for CMSA and learn what is happening in the CMSA arena . Contact Nikki at the above email address to join.
- Chapter President’s vote for your next CPC Representative and if you are a chapter president and did not receive a ballot contact Nikki Jackson. If you have any questions please contact me at [Connie.Keene@MI.alarisadvantage.com](mailto:Connie.Keene@MI.alarisadvantage.com). We have four great candidates this year, so read their bio and vote soon. In alphabetical order the four candidates are : **Nancy Benoit from New England Chapter, Catherine Campbell from Dallas-Fort Worth Chapter, Bernice Murphy from the NE Florida Chapter and Jose Santoro from the NYC Chapter**. This is very exciting to have four great candidates.
- Register for the CMSA National Conference which will be held in San Antonio this year. You can learn about this great conference at [www.cmsa.org/conference](http://www.cmsa.org/conference) and I hope to see all of you at the Rodeo on Tuesday night, June 14<sup>th</sup>. I plan to wear my red cowgirl boots!
- Plan to attend the chapter president mixer on the evening of June 13<sup>th</sup> for the pin exchange while attending the National CMSA conference. My chapter, Greater Grand Rapids/Kalamazoo of Michigan did not have a chapter pin prior to this announced event, but we do now. We are excited that we now have a chapter pin and we plan to distribute this to our chapter members during case management week this year. So, we are very excited about this event and I hope to see you there.

If you would like to share your chapter happenings with all of us then send to Nikki a little update for the next chapter dispatch.

Thank you for choosing CMSA as your professional organization of choice. We are proud to have you on our team.

Thank you!

*Connie Keene*

# Chapter Leader Mixer

Monday, June 13, 2011

7:00p - 9:00p

## CMSA's SAN ANTONIO 2011 Conference

Grand Hyatt, Republic B Rm, Henry B. Gonzalez Conference Ctr

This year, CMSA is incorporating a pin trading activity into the Leader Mixer!



Pin trading is a fun activity to encourage increase leader networking and sharing of experience and knowledge within your chapter through interactions with other leaders. Just think of the increased visibility for your chapter as other leaders are wearing your pin and promoting your chapter throughout the week!

Your chapter can get as creative or as simple as you'd like with something that represents your chapter - could be the chapter logo, State or community related, local conference theme, etc.... **The exchange is optional**, but will be a great way to encourage interaction with other chapters and share how special and unique your chapter is!

Bring your chapter's lapel pin to the CMSA Chapter Leader Mixer at CMSA's 21<sup>st</sup> Annual Conference & Expo in San Antonio to kick off the exchange! Enjoy meeting CMSA leaders from other Chapters around the U.S. and trading CMSA Chapter pins.

*CMSA National will supply lanyards to wear and display your pin collection.*

Light appetizers and cash bar available.

All Chapter Leaders are welcome at this event.

**Please RSVP by May 23, 2011**

to Nikki Jackson at [njackson@cm-innovators.com](mailto:njackson@cm-innovators.com).

Event sponsored by  MedImmune

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