THE CHAPTER DISPATCH
August 2007

TOPICS IN THIS ISSUE

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AT A GLANCE – Important Dates

2007 CALENDAR

Aug 31	**End of Fiscal Year-** Begin year end Financial Reports
Oct 3-5	**Collaborative Practice Summit**
Oct 31	**National Board Nomination Deadline**
Oct 7-13	**National Case Management Week**
Oct 31	**Deadline for Board of Directors Nominations**
Sept 1- Nov 30	**Member Get A Member Campaign**

CMSA National Board Nominations

Now Accepting Nominations for 2008-2009 Board of Director Candidates

NOMINATION DEADLINE: OCTOBER 31, 2007

CALL FOR LEADERS: CMSA, the world's largest organization of case management professionals is seeking future leaders to serve as officer, director, and international director. CMSA is a not-for-profit Section 501(c)(6) professional society that is governed by an elected Board of Directors, supported by appointed Task Forces, and staffed by a professional association management company.

If you are interested, or know of someone who might be interested, in serving in a national leadership position with the Society, please download and complete all forms within the National Election Nomination Packet.

MISSION: In keeping with its mission "to promote the individual and collective professional development of health care case managers", future leaders will join a team of visionary leaders and dedicated professionals who are setting the pace with case management practice and health policy in today's healthcare environment.

LEADERSHIP COMPETENCIES and PROFESSIONAL LITERACIES: Future leaders will possess the necessary competencies and professional literacies (as indicated in the Board Position Descriptions and the Leadership Interest Form) and will:

- Be aware of current CMSA issues, concerns, and vision from a global perspective
- Be committed to excellence in case management practice and process
- Demonstrate a balance between visionary thinking and short term action
- Maintain the highest standard of personal conduct
- Contribute to the enrichment of the Society
- Be socially responsive and embrace openness and diversity within the Society and other organizations
- Be knowledgeable of CMSA Bylaws and Robert's Rules of Order
- Demonstrate an ability to provide effective leadership
- Demonstrate effective verbal and written communication skills
- Be computer literate and online accessible to maintain on-going interactive communication with other board members and staff
- Possess the ability to fulfill the time commitment and travel expectations of a National leadership position

ELECTION FORM PROCESSING: All individuals interested in serving in a leadership position must complete the National Election Nomination Packet and submit a current Curriculum Vitae (CV). Information not indicated within the National Election Nomination Packet or CV cannot be considered in the selection process. All forms must be postmarked by October 31, 2006, to the CMSA National office. Deliberations of the Nominating Committee will remain confidential.

Level I minimum criteria will be verified by CMSA National. The Nominating Committee will process all candidate applications who meet Level I criteria by applying Level II criteria. The final slate of candidates to the Board of Directors will be recommended using Level III criteria.

2007 National Case Management Week!

Make plans now for *National Case Management Week 2007*! *"A Showing of Hands"* is the theme, so begin plans to celebrate the week of October 7 – 13 to help promote case management and bring attention to the contributions that case managers make to the healthcare industry.

Products this year will include:

- Heart-Shaped pins "Case Managers Hand in Hand"
- Luggage Tags with CM week Logo
- Retractable Name Tag Holders
- Mouse Pads with CM Week Logo
- T-Shirts with CM Week Logo
- Coffee Mugs with CM Week Logo
- CM Week Posters ($8^{1/2}$x 11" 11x 14")

Also, visit the official National CM Week website at *www.cmsa.org* for information to assist you in planning your CM week events:

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

Now is the time to begin working on your chapter to receive a proclamation from your governor.

2007 Fall Member-Get-A-Member Campaign

Get ready the fall membership drive is coming soon. Take some time to brainstorm on what recruiting tools your chapter is going to use to bring new members into your chapter. 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 chapter 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 applications, 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, 2007

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

Influenza Planning Toolkits

I want to thank each of you for an excellent CMSA meeting in Denver.

I was very impressed with the turn out and the response from the case managers. The Influenza Pandemic Planning program was superior. The turn out was beyond expectation. Connie and Nancy did an excellent job of presenting the material and making everyone aware of the need to start PLANNING NOW! Many Case Managers commented later that they should have developed a plan long ago and that they appreciate Roche's support of the meeting and look forward to receiving the Pandemic tool Kit.

The Exhibit was over run after the presentation for Influenza Planning toolkits. I will make sure that everyone who requested a copy receives the toolkit.

However, since the tool kit was originally developed new information has become available and this information would be valuable to the Case Managers as they prepare their organizations for Influenza Pandemic planning. The latest information is available on line at WWW.Pandemictoolkit.com. This information is updated on a monthly schedule. It includes videos, articles, slides and helpful information.

I was hoping that you would consider placing this web site on the CMSA web site to notify all Case Managers of the organization that they can go to this web site to access the latest information.

Again, thank you for allowing us the opportunity to be a part of your meeting. I look forward to continuing to work together. Thank you.

Jim Rising, R.Ph.
Roche Pharmaceuticals

IRS Presents Draft Redesign of Form 990

The IRS has released for public comment a discussion draft of a redesigned Form 990, *Return of Organizations Exempt from Income Tax*, filed by many public charities and other exempt organizations. The discussion draft constitutes a significant redesign of the form, which has been revised only on a piecemeal basis since 1979. The IRS anticipates using the form for the 2008 tax year (returns filed in 2009). The proposed redesign does not affect the other forms in the IRS Form 990 series; however, through this process, we are requesting comments on filing thresholds with respect to some of these forms. IRS officials will discuss the revision in a telephone forum on July 18 and 19, 2007.

Questions concerning the redesigned form and instructions should be e-mailed to the IRS at Form990Revision@irs.gov; or mailed to Form 990 Redesign, ATTN: SE:T:EO, 1111 Constitution Ave., N.W., Washington, DC 20224. Comments are due no later than September 14, 2007.

The redesign of Form 990 is based on three guiding principles: enhancing transparency, promoting tax compliance, and minimizing the burden on the filing organization.

- Enhancing transparency means providing the IRS and its stakeholders with a realistic picture of the organization and its operations, along with the basis for comparing the organization to similar organizations.
- Promoting compliance means the form must accurately reflect the organization's operations and use of assets, so the IRS may efficiently assess the risk of noncompliance.
- Minimizing the burden on filing organizations means asking questions in a manner that makes it relatively easy to fill out the form, and that do not impose unwarranted additional recordkeeping or information gathering burdens to obtain and substantiate the reported information.

Additional information

- IR 2007-117: IRS Releases Discussion Draft of Redesigned Form 990 for Tax-Exempt Organizations
- Highlights of the Draft Redesigned Form 990
- Background Paper on Draft Redesigned Form 990
- Summary of Schedules and Filing Profile
- Highlights of Schedules and Filing Profile
- Draft Redesigned Form 990, Schedules and Instructions

CHAPTER REMINDERS

Ask Barbara!

In response to the great presentation by Barbara Dunn, Esq., CMSA's Legal Counsel's, at the Chapter Leadership Workshop we will now have a ask Barbara section in the Dispatch. She will provide various articles she has written on the legal issues of an organization. This will also be an opportunity for your chapter to ask her questions about liability, copyright issues, ect. You can forward any questions that you have for Barbara to Michele Lee, mlee@acminet.com.

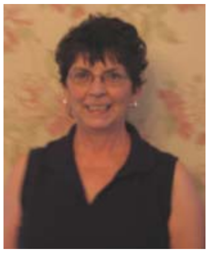
Local Chapter Directory

Visit cmsa.org and click on membership, then chapters, then local chapter's directory. Review the information for your chapter to make sure it is current and up to date. This area can be used to post meeting and event announcements, in addition to your local chapter's websites. As current and perspective members of CMSA visit the website they will be able to view events happening in their area. Send updates and notices to njackson@acminet.com.

Chapter Officer Updates

Many chapters have recently undergone elections for a new term. Please 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. 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



Good Morning- beautiful day here in New England!

CPC Forum on line has seen some activity since the conference but been relatively quiet. Maggie shared how she's been able to find exhibitors/ sponsors as result of Peter's wonderful idea of experienced leaders mentoring others in the Exhibit Hall. Recently discussion focused on potential for teleconferencing short vs. long programs. Share your ideas, if you are a current Pres, Pres-elect, or VP and not receiving e-mail updates from the forum, be sure to contact Nikki in CMSA National office and let her know, so you can participate with us.

September sees many local CM Chapters having conferences, bring your questions and share successes on the forum, so that others may benefit from your experiences. Then OCTOBER- CM WEEK- what have you done in preparation?? CMSA national office makes it easy- go to the website:
http://www.cmsa.org/Portals/0/PDF/CMWeek/CMWeek2007Guide.pdf
Pick a few ideas to spread the word and Celebrate CM with your members, employers and local media.

CMSNE, my local chapter, assigned two fairly new Board members the task of organizing Chapter CM week activities. They've come up with some awesome ideas. Additionally, the entire Board charged each Board member with delivering our PR packet to two persons or Facilities prior to CM week to get the word out about CM and about CMSA. Let us know what you're doing and the results. Tell us how your Conferences go.

We had a wonderful sharing of ideas in Denver, let's keep up that dialog online, so that all can participate and benefit.

See you in Orlando?

Cheryl
2007-08 CPC Representative

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

Atlanta, GA

CMSA-Atlanta Chapter cares about it's community it serves also by donating $2000 to a local charity called Dream House for Medically Fragile Children. The organization is located in Conyers, Georgia and has two programs that helps indigent children who need continued medical care in a non-acute care setting. The first program, Family for Keeps™, teaches family members how to care for their child. Many caregivers are foster parents just learning their new roles. The second program, Bridging the Gap™, helps build ramps, cover therapy, and provide medical equipment for these children. Beverly Sell and Linnea Roe from the Dream House for Medically Fragile Children accepts the check from CMSA-Atlanta Chapter President, Janet Stephens. For more information, contact www.dreamhouseforkids.org or www.cmsa-atlanta.com.

Indianapolis, IN

The Officers and Directors of CICMSA are actively involving members to pursue strategies for growth of the Chapter. The ever changing opportunities in the delivery of health care offer advantages for expansion.

Detroit, MI

The CMSA Detroit Chapter is gearing up for what is hoped to be another successful Dinner conference schedule for 2007. They also are planning a drive to push for over a 500 member membership this fall through the spring of 2008. This drive will be kicked off at their September meeting and will strive for a goal of 500 members or more by the end of the spring 2008. The Detroit Chapter is also looking forward to their elections of new board members this fall as well. As one board member stated it is always "Good" to have New Faces, New Ideas and a New Attitude! This is just an addition to a hard working group of current board members. Here's to a "Great" 2007-2008 year to all of you!

Chesapeake, MD

CSMA of the Chesapeake held a social event on May 23 to thank the case managers and vendors of the chapter. The evening had relaxation techniques, aromatherapy, and prizes. On June 27th, the Chapter heard an informative presentation on Lyme disease, which was sponsored by Coram.

Springfield, MO

The CMSA of Springfield and the Greater Ozarks held its board meeting this month and began planning for the chapter's 10th Anniversary celebration. An annual meeting will be held at the end of the year with a banquet where new officers will be elected. In celebration of the 10th Anniversary, the chapter is planning to make the banquet/annual meeting very special with something to commemorate this special time for each member. The planning of the annual seminar is in the beginning stages.

Las Vegas, NV

Sizzling' Summer Sensations-The Board of CMA-LV is turning up the heat with their current membership campaign by giving an official CMSA pin with all new memberships. The CMA-LV Board, inspired by their recent participation in the DFW-Chapter leadership retreat, is planning a strategic offsite in early August to develop a three year plan for their chapter growth and development. They will be eliciting their members input for this strategic planning session via an email campaign in the month of July.

Dallas, TX

The Chapter does not have monthly dinner meetings during the summer months between June & August. However, members are provided Chapter updates through the monthly newsletter, "Case Notes".

The Strategic Planning Committee is busily planning the next event. A "Re-Retreat" for new & pending Chapters who attended the spring Invitational Leadership Retreat. Those new & pending Chapters will come together again in September to celebrate their progress & plan their next steps in Chapter development.

Volunteer Management – Finding Leaders and Chairs

Preferred Practices

1. Take time to plan and get organized – Before volunteers are asked to work on a project, the project team leader must take time to think the project through and do adequate pre-planning.
2. Determine the deadline for completing a large project – for major projects, set interim deadlines up front. For example, in the case of planning a conference, set deadlines for contracting speakers, completing the program topics and mailing registration materials.
3. Break the project down into groups of major tasks to be done – If your project is large or complex, recruit a project team of experienced volunteers, each to be responsible for a group of major tasks.
4. If your project is smaller, create small tasks that are achievable in a short time and will not intimidate new volunteers. – For a one-day event, small tasks may include securing preparing the event site, planning food, etc.
5. Clearly define each task to help ensure that a member will agree to volunteer and the task will be completed – If you recruit volunteers to welcome new members, they may interpret that as greeting them in person when, in fact, you intend them to be called by telephone or written a note.
6. Develop a timeline – Using the list of tasks, estimate how much time each will require.
7. Determine how many volunteers you will need – keep in mind the more volunteers you recruit the less work each has to accomplish.
8. Determine the level of experience that a given volunteer needs to complete each task – This depends on the amount of risk involved; for example, tasks dealing with financial or legal risk should be handled by an experienced volunteer.
9. Determine what information skills and tools the volunteer must already have and what training you will provide – Think about the needs of your project beforehand, and if a volunteer lacks certain skills, be ready to provide needed training.
10. Design a worksheet for each project – More complex projects will have more detailed planning sheets; features may include task descriptions, estimated completion time, risk levels, deadlines for completion and evaluation, and assigning volunteers.
11. Don't wait for members to volunteer **– ask them** – Recruit the best people for the job and don't wait for someone to offer.
12. Fill high-risk tasks with experienced volunteers first – Concentrate on assigning your most experienced and proven volunteers for large and more important tasks, then assign smaller tasks to less experienced members.

Pitfalls

1. Letting new volunteers loose on a project – Assign low risk tasks to new volunteers until they prove to be dependable; don't assume they understand how to complete a project after providing one training session or explanation.
2. Feeling that asking a member to volunteer was a waste of time if your request was denied – Even if a volunteer declines at this time, it lets the volunteer know that there is a need for them to volunteer in the future.

3. Asking everyone to volunteer – Narrow the field; make a list of names and telephone numbers of five people you think would be good for the task in order of who would be the best fit for the job.
4. Asking the person first who is most likely to say yes – The best person for the job may not be likely to say yes first; go for quality and let the person know that they were asked first and that it is important that they get personally involved – making them feel flattered to be asked.
5. Assuming that people will say no – Instead, assume that people will say yes, people like to be asked and it shows that you respect their work.
6. Failing to be flexible with task assignments – Whenever possible have more than one task from which the member can choose; be flexible and willing to adjust your request to meet the member's needs.
7. Limiting your list of potential volunteers to your current volunteers – Creating a diverse group that represents all segments of your membership is the first step in recruiting volunteer leaders and officers; for example, collect potential volunteers from interest surveys, project reports, and ask staff and board for recommendations.
8. Asking a member to volunteer with whom you won't directly be working – If you do not personally know anyone in the group from whom you are recruiting, ask other volunteer leaders and staff who are closer to them for their input on your list of prospects.
9. Waiting to assess a member's interests for volunteer activities until he or she arrives at your doorstep – When you call to ask someone to volunteer, ask for their task preferences, allowing you more time for organization and a proper fit for the volunteer.
10. Providing no public recognition – Use published notices of volunteer opportunities in your newsletters to remind members that their time and talents are essential elements in the organization.
11. Standing up at a meeting and asking members who are interested to contact you or sign up on a sheet being circulated around the room – This communicates that anyone can do the job at hand when actually you want the best person for the job.
12. Asking a volunteer to stay longer to finish a task – When a volunteer completes the time block they are committed to, thank them and let them go; leave the door open to come back to the task at a later date.

Source: Adapted from: *Volunteers: How to Get Them, How to Keep Them* by Helen Little.

Grant Writing Tips

1. Make sure you have plenty of time. Most grants can consume at least 40 hours of workup.

2. Organize your proposal, and pay close attention to details and specifications laid out in the Grant application.

3. Clearly understand the grant maker's grant before writing the proposal. Make sure the grant maker's goals and objectives reflect your grant seeking purposes.

4. In your written proposal prove that you have a significant need or problem.

5. Incorporate into the written proposal your need/solution to our problem, using experience, ability, logic, and imagination consistently though out your proposal. It should have a theme running though it showing how you are going to effectively use your speakers to drive the educational component.

6. Be sure to review the literature and include it in the proposal.

7. Research the grant maker to determine their funding purposes and priorities.

8. Determine if the grant maker's goals and objectives match yours,

9. Write your proposal in the appropriate and complete format and include required attachments. This will vary among grant makers.

10. Be very clear about why you are seeking a grant, what you plan to do with it, and why you are a good fit with the grant maker's priorities. Make your request a persuasive and unique proposal.

11. Always follow the exact specifications of the grant makers in their Application Requests for Proposals and Guidelines. Every Grant will differ in the application process.

12. Demonstrate project logic and outcome, impact of funds, and community effect. Be specific about broad goals, measurable objectives, and quantified outcomes.

13. Follow-up with the grant maker about the status, evaluation and outcome of the proposal after it is submitted. Request feedback about your proposal; strengths and weaknesses.

Cristina Walter, MS, RN, CCM, CCP
President Southern Ohio Valley CMSA

Communicating with Elected Officials

Article from ONS Legislative Action Center, www.ons.org.

Heightened security measures have dramatically increased the time it takes for a letter sent by post to reach the offices of federal or state legislators. More and more, citizens are using emails and faxes to communicate their concerns and increasingly elected officials' offices prefer electronic communications for constituent contact. As a general rule, Members of Congress are far more likely to heed your message if you are one of their constituents. The following tips aim to improve the effectiveness of your correspondence, regardless of the means you choose to deliver your message.

Tips for Writing Congress: http://www.ons.org/lac/pdf/10TipsLetters.pdf

- State your purpose for writing in the first sentence of the letter. For example: As your constituent, I am writing to urge your support for increased funding for health care.
- If your letter pertains to a specific piece of legislation, identify it. And make sure that you are referencing the correct legislation to the correct body of Congress. House bills are H.R.____; Senate bills are designated as S.____. It is also important to know the status of the bill.
- Be courteous.
- If appropriate, include personal information about why the issue matters to you to make your point.
- Address only one issue in each email.
- Close your letter with a restatement of your purpose and indicate the response that you expect.

Addressing Your Correspondence to a Senator:
The Honorable [Jimmy Stewart]
__(room number)__(name of) Senate Office Building
United States Senate
Washington, DC 20510

Dear Senator [Stewart]:

Addressing Your Correspondence to a Representative:
The Honorable [Jimmy Stewart]
__(room number)__(name of) House Office Building
United States House of Representatives
Washington, DC 20515

Dear Representative [Stewart]:

Tips for Phoning Congress: http://www.ons.org/lac/pdf/10TipsCalls.pdf
Telephone calls are usually taken by a staff member, not the member of Congress. Ask to speak with the aide who handles the issue about which you wish to comment. (See our guide to Congressional staff here.)

After identifying yourself as a constituent, tell the aide you would like to leave a brief message, such as: "Please tell Senator/Representative [Name] that I support/oppose [S.___/H.R.___]."

State your reasons for your support or opposition to the bill. Ask for your senators' or representative's position on the bill. You may also request a written response to your telephone call.