

THE CHAPTER DISPATCH

September 2007

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AT A GLANCE – Important Dates

2007 CALENDAR

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 literacy's (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 here. 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.

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

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

Tuscaloosa, Alabama

Tuscaloosa Extension Chapter had a lunch and learn on August 22 with 30 attendees. The chapter is planning a conference on December 5th featuring Jackie Birmingham who will talk on Discharge Planning and other topics for case managers.

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!

Asheville, North Carolina

WNC-CMSA of North Carolina held a very successful dinner meeting on Thursday August 16th at the Boathouse on Lake Julian in Fletcher, NC. Topic was Nesitritide (brand name Natrecor) an FDA approved drug for acutely decompensate CHF. Presentation was by Valorie Speegle-Snell, Heart Services Leader of the Chronic Heart Failure Team at Mission Hospital in Asheville NC. The dinner and CEU was underwritten by Scios a member of the Johnson and Johnson family.

In addition to this informative gathering, an important first for WNC-CMSA was the premiere of an electronic newsletter which was sent out on Friday August 19th. The newsletter will be sent quarterly per email to the chapter’s members/supporters in an attempt to promote communication in this largely rural chapter of Western North Carolina.

Las Vegas, NV

The CMA-LV Chapter leadership held a strategic planning session on 9/8/07 to develop a three year plan for our chapter. Key strategies include developing a website, adding additional CEUs for CCMs and SWs and establishing goals for membership growth. Our September meeting is scheduled for Sept 18th, 2007 from 5:30-7:30 PM at the Sierra Health Services corporate office and will be sponsored by Pfizer. The topic is Innovations in Cardiac Care presented by Dr. Seleparis, the Chief of Cardiology at SouthWest Medical Associates. We are also holding our annual elections this month and have a wonderful group of professional, highly skilled case managers that have volunteered to serve our membership in 2007-2008. We continue to plan for our October meeting that will focus on organ transplantation and a holiday party coupled with a local health care service provider fair.

Long Island, NY

The CMSA LI Chapter experienced an all time record attendance at it's last meeting with an important and timely topic, both from the professional and personal perspectives, Long Term Care Insurance - What Every Case Manager Should Know. The speaker was Margaret P. Chu, BSN, MPA, RNC, CCM, CPHQ, national Vice President, CMSA, and VP of the LI Chapter.

The September 19th meeting will be on Infection Resistance and Transmission: The Growing Threat to Healthcare, presented by Carolyn Farrell, RN, Clinical Service Liaison, Coram Specialty Infusion services. The LI chapter is also busily preparing for it's Annual Meeting to be held at the Westbury Manor on : Ethics in Healthcare: Issues and Insights in Case Management, with keynote speaker, Diannn Uustal, RN,MS,Ed.D.

Dallas, TX

The Dallas Fort Worth chapter has recently announced the results of the BOD elections. Installation of the new officers took place at the regular dinner meeting, this past Tuesday. A strategic planning session is scheduled for the month of October to chart the course of Chapter activities for this year.

The Community Relations Committee has already scheduled 2 events before the holidays. September's event will be Chapter members participating in the Alzheimer's Association Memory Walk. October brings the chapter 3rd year of walking in the Diabetes Association Walk. Each an opportunity to spread the message of case management, CMSA & how important case management services are.

The Strategic Planning Committee will host a Leadership "Re-retreat" the end of September. This is the second retreat (brought back by popular demand) of '07 so apply titled "Re-retreat". Eleven Chapters from all over the country will send officer representatives to enjoy 3 days of networking, problem solving & learning strategies to help make their chapters more successful.

The annual Fall Seminar will take place in October. A one day CCM prep class will precede the seminar. This year's seminar is focusing on 2 professional case management tracks; hospital & worker's comp. Nancy Skinner will provide the opening & closing sessions which will be fun, interesting & relevant.

LEADERSHIP RESOURCES

With the new fiscal year and the changing of chapter leaders, it is important to understand the roles of all of the members of the board. Not just your own. Understanding the roles of others will help you make better decisions, run better more effective meetings, and overall have a successful board that works as a team.

Financial Accountability

Fiduciary responsibility rests with the entire board, not just the treasurer! Whatever your position, you will want to make sure that your board has procedures in place to adequately record and monitor the financial activities of your organization.

Here are some procedures to consider:

- Prepare an annual budget (income and expense) that reflects the values and mission of your organization.
- Review your budget regularly and change course if necessary.
- Set it up so that no single individual is responsible for: 1) receiving, recording and depositing funds or 2) approving expenditures and writing and signing checks. (These checks and balances discourage embezzlement.)
- Cash disbursements and bank reconciliations are better assigned to different individuals. Perhaps a the VP, Pre-Elect, or a Co-Treasurer.
- Have bank statements sent to a board member other than the treasurer.
- Make sure that dues and sponsorships are received and properly recorded. Thank your sponsors.
- Outline the process for 1) securing bids from vendors and 2) approving contracts. When appropriate, require a minimum of three bids before purchasing.
- Ensure that timely and useful financial reports are available to all board members.
- Establish an emergency fund to cover unexpected expenses or sponsorship shortfalls.
- Identify an audit committee and perform regular audits to review the group's financial records. At least one per year.
- Comply with governmental and other reporting requirements, such as 990/EZ, annual corporate reports, etc.

Make plans today to ensure that the interests of your group are protected.

Info retrieved from The Money Minder Team [info@moneyfinder.biz]

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.