



NOVEMBER CHAPTER LEADER WEBINAR EVENTS 101

November 14, 2019

Presented by: Eric Bergman



ANNOUNCEMENTS



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Awards Submissions

- CEIA (Chapter Excellence and Innovation Awards)
- CMOY (Case Manager of the Year)
- AOSE (Award of Service Excellence)

Guide to Protecting and Managing Chapter Finances

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Chapter Leader Webinars

- 2nd Thursday of the Month
- 3:00 PM CST.

November	Chapter Events 101
January	Chapter Financial Responsibilities
March	Membership Growth
May	Designing a Leadership Team

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ANNOUNCEMENTS

Let's Reach 8,000 by 2020

- 7876 Current
- 124 more members
- Just 2 new members per chapter
- Retain Current members

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NEW MEMBERSHIP PROMO



GROW WITH CMSA **CMSA**

**Expand
Your
Network**

**Enhance
Your Career**

Join CMSA and Save \$20
with promo Code **EXPAND2020***

*only valid on A and B memberships
Expires 12-31-19
Visit www.cmsa.org to join today!

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LETS TALK ABOUT IT

1. Each president will get a number assigned.
 - via email
 2. Reach out individually to other leaders,
 - Just to say hi ,ask for resources, swap ideas, troubleshoot, ect.
 - Numbers are shared only on a private contact - phone or email.
 3. President with the most numbers turned in by **March 1**, gets an additional free conference registration for their chapter.
- The goal is to talk about how to make CMSA and the chapter leader experience better



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EVENTS 101





A Message from:
Eric Bergman, RN, CCM
 Your CMSA Chapter President Council
 Representative
 2018-2019

Creating Value For Our Members

Last month we discussed the importance of membership. I believe this is the single most important challenge facing CMSA and most other organizations today, so I will continue to focus on membership building and retention.

EVENTS 101



WE ARE OBLIGED TO HOST EVENTS?

- Chapter Affiliate agreement
 - Requires chapters to put on events to fulfill our obligation to the National organization.
 - Exchange of experience on opinions
 - Promote professionalism
 - Educate members
 - Develop professional standards
 - Advance the practice of Case Management
 - Promote public stature of Case Management





**WHAT DOES A
GREAT EVENT
LOOK LIKE?**

PROFESSIONAL

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**WHAT DOES A
GREAT EVENT
LOOK LIKE?**

IMPRESSIVE

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**WHAT DOES A
GREAT EVENT
LOOK LIKE?**

IMPRESSIVE



**WHAT DOES A
GREAT EVENT
LOOK LIKE?**

**FUN AND
ENGAGING**



A VARIETY OF OFFERINGS

Annual

- Regional or Chapter conference
 - Some chapters are discussing pooling resources

Multiple

- Monthly or semi monthly meetings
 - Educational offerings over a meal
 - Regular business meetings to manage the chapter
- Networking events
 - Vendor showcase
 - Holiday party

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EVENTS: THE VERY BASICS

- The absolute basics - to be sure no one is left behind
- An event needs three attractive elements
 - A nice place to meet
 - An engaging educational or social topic or theme
 - Food and drink



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GETTIN' EM IN THE DOOR

- One of your strongest draws is CE
 - Must be tied to a good topic
- Set up your Chapter as a PACE provider
 - Its easier than you think
- RN and SW CE can be accredited by some states or the ANCC.



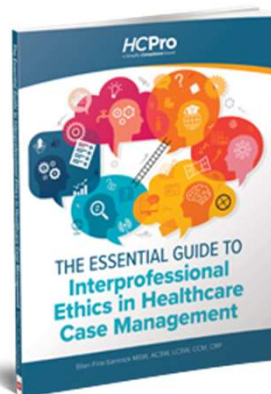
Commission for Case Manager Certification

PACETM
Pre-Approved Continuing Education

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DON'T GET CAUGHT BREAKING THE RULES

- Learn the ethics of how to mix CEs with sponsorship
 - Its not as hard as you might think,
 - But you must know the rules



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FIND SPONSORS & COVER THE COSTS

- Find Partners and build those relationships
- We can help you get started



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BUILDING THE EVENT



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OVERWHELMED?!

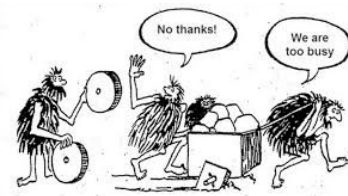
- Try this
- The CMSA Education Resource Library
 - <https://www.cmsa.org/education/education-resource-library/>




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ORGANIZING EVENTS

- CMSA.org has some really helpful guides
- Here are few other resources:
 - Ten step guide to event planning
 - <https://www.wildapricot.com/articles/how-to-plan-an-event>
 - Event Check list
 - <https://www.wildapricot.com/articles/event-checklist>
 - Downloadable E-book
 - <https://guidebook.com/mobile-guides/professional-event-planning-guide-download-free-ebook/>
 - A list of helpful guides
 - <https://www.eventbrite.com/blog/event-planning-guides-ds00/>



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StarChapter™
Association Management Made Easy

STAR CHAPTER RESOURCES AND TIPS

- If you are using StarChapter it can:
 - Advertise your event
 - Run the registration for you event
 - Create reminders and automate them
 - Mange electronic evaluations
 - Distribute electronic CE certificates
 - Build, maintaining and use your database

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OTHER EVENT PLANNING SOFTWARE AND PLATFORMS

- Here is a giant list of software with reviews:
 - <https://www.capterra.com/event-management-software/>
- There are many companies that will sell you event management solutions
 - Here a review of platforms you can use:
 - <https://www.g2crowd.com/categories/event-management-platforms>
 - Here's a review of some options from a company who sells a product to integrate event management and attendee engagement:
 - <https://whova.com/blog/free-event-planning-software-make-you-rockstar/>






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PLANNING

- The most critical aspect of hosting any event
 - Allow plenty of lead time
 - Get the details nailed down early
 - Market it well and professionally
 - Make clear brochures/website/ads that spell out the event details
 - Who should attend
 - What will they learn, and what benefits are in it for them
 - Where will it be
 - When will it happen
 - How to register
 - Use social media and other online avenues to generate buzz
 - Don't forget CCMC for your certified events
 - Have adequate staff to make the day a success
 - Encourage members to join in the fun by volunteering at the event
 - Incorporate into your policies and procedures that all board members will work at chapter events

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SOME FINAL TIPS

Building sponsors is an ongoing project

- You need to engage with potential organizations and companies
- Attend other events to market your chapter
- Host events that wow your sponsors and get the buzz going in the community

Making your event historical

- Hire a professional photographer and videographer

Some ideas for events

- Annual conference – *of course – but...*
- Dinner/luncheon meetings
- Host a case management training for local organizations
 - use CMSA National resources
- Book club or discussion group
- Choose a book or TED Talk
- Networking events – Vendor fairs
- Members teaching Members
- Parties – 'cause we all like to socialize

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QUESTIONS

