

## 2020 Chapter Goals and Workplan

### Chapter Name

Region: East

District: 3

Please complete this work document and submit it to Lisa Kroll or Lauren Mendelsohn by **Monday, January 20<sup>th</sup>**.

### Chapter Status: Full

Your chapter is currently a “Full Status Chapter” of the Society of Hospital Medicine. This status is maintained by keeping a Green or Blue Health Status annually and by meeting the minimum chapter requirements. **SHM will use the data reported in this workplan document as well as other data collected separately to determine your chapter’s 2019 health status.** Health status reports will be distributed to each chapter’s leadership upon submission on this workplan. Below are the categories included in determining a chapter’s health status.

### Chapter Health Status Category Overview:

- **Year Prior Health:** The chapter’s health status of the previous calendar year is considered for chapter sustainability.
- **Years Established:** Number of years since the chapter received provisional recognition from SHM.
- **Leadership:** Number of leaders, defined roles with terms, bylaws.
- **Leadership Training:** Attendance on quarterly district calls, training programs at the annual conference and webinars.
- **Admin:** [meeting notification forms](#), [meeting report forms](#) and sign-in sheets submission in a timely matter.
- **Annual Goals and Meeting Plan:** submitted to national office annually in the template provided to chapters, strategic planning meetings conducted by chapter leadership.
- **Chapter Membership:** SHM dues-paying members living in the chapter's geography.
- **Chapter Meetings:** Educational meetings over dinner, networking-only, webinar/telecast, full or multi-day conferences
- **Engagement with Nationally Provided Programs:** Examples of engagement include but is not limited to applying for excellence awards, development funds, CME (through SHM), participating in chapter challenges, utilizing national exhibitor packages, engaging on HMX, supported chapter members in applying for SHM Fellows Program, and etc.
- **Engagement Initiatives for SHM constituents:** Examples of engagement include but is not limited to holding a meeting to engage one specific constituent, such as residents/students (RIV Poster competitions, career panel), APPs, practice

administrators, or other non-physician hospitalists. Meetings that engage a particular specialty, such as pediatric hospitalists, would count in this category.

- **Membership Recruitment and Retention:** Initiatives to recruit new members to join SHM and initiatives to retain members to renew memberships with SHM. This could include utilizing funds to help subsidize the cost of membership, holding recruitment focused meetings where benefits of SHM/chapter are discussed, and other membership-focused initiatives.

**For more information on chapter health status evaluation including a description of chapter activity per category in each health status category, [please click here.](#)**

## Chapter Finances/Meeting Reports

The [chapter finance section of the Handbook](#) has been updated to reflect current SHM policy and procedures for 2020. As a reminder, chapter finances and meeting reports are provided to each chapter quarterly via the Google Drive. Access your chapter's reports here: [<insert link>](#)

## Chapter Handbook

The Chapter Handbook outlines the policies and procedures of SHM's Chapter Program. An understanding of and adherence to these policies and procedures will ensure a positive relationship between your Chapter and the SHM National Office. Therefore, SHM requires that all Chapter Leaders read the [Chapter Handbook](#) and check the box below, agreeing that your chapter will adhere to each of the statements listed below:

1. I have read and studied the SHM Chapter Handbook.
2. I will read and study any additions to, or revisions of, the Handbook provided by SHM.
3. I will adhere to the policies explained in this Handbook.
4. I realize that lack of adherence to these policies by Chapter volunteers or designees may result in the revocation of Chapter status.
5. I realize that SHM may revoke Chapter status at the discretion of SHM's Board of Directors for any action deemed contrary to the mission of SHM.
6. I agree to follow any directives related to Chapter activity or conduct received from SHM's Board of Directors or Staff.
7. I will provide any information requested by SHM's Board of Directors or Staff related to Chapter activity or conduct in a timely fashion.
8. I understand that the policies in this Handbook are subject to interpretation, review and change by SHM's Board of Directors.

**By checking this box, my chapter leadership agrees to adhere to the guidelines outlined in the [Chapter Handbook.](#)**

## Chapter Leadership

Below is the information SHM National has documented for your Chapter's existing leadership.

Position	Term Ends	First	Last	SHM Membership Renewal Date
Past President				
President				
President Elect				
Secretary/Treasurer				
Director of Mem Develop.				
Advisory Board Member				
Advisory Board Member				
Advisory Board Member				
Advisory Board Member				

## Election

Based on the leadership terms listed above, your chapter **does** need to conduct a call for nominations in 2020 for the 2021-2023 term year. **Please comment below if any corrections need to be made.**

As a reminder, below is the timeline for Chapter Elections.

**September – November:** Call for Nominations

**December:** Nomination Review/Ballot Set-up

**January - February:** Elections – Chapter Members Vote

**March – April:** Leadership Changeover at the Chapter Leader Summit at SHM Annual Conference

## Membership List

If your chapter manages a local list of contacts for your chapter, please submit the list with the submission of this form. We can then verify everyone as a member/non-member and promote your chapter meetings to each person. For your chapter's current membership roster, please click here [<insert link>](#).

**Membership lists should be solely utilized for SHM business-related purposes, including member welcomes, membership engagement, retention and new membership recruitment. Please note that it is strictly prohibited to share membership lists and/or contact information with anyone outside your chapter leadership.**

## 2019 Self-Assessment

**Please respond to each of the following below.**

1. The chapter's goals and bylaws align with those of SHM. Additionally, the chapter meets the SHM branding guidelines as outlined in the Chapter Handbook.

Achieved  Not achieved

2. The chapter maintains written position descriptions with defined terms for all leadership positions. Additionally, the terms begin and end in alignment with the SHM annual conference.

Achieved  Not achieved

3. The chapter allows all dues-paying members to nominate themselves or others for open leadership positions. Nominations are collected nationally. If collected locally, the information is shared with national for record keeping and member engagement scoring.

Achieved  Not achieved

4. The chapter leadership met regularly to discuss its goals and meeting plans during 2019.

Achieved  Not achieved

5. The chapter shares updates with members through the HMX community.

Achieved  Not achieved

6. What types of initiatives did your chapter conduct to engage members? **Please include the constituent (NP/PAs, residents/students, pediatric hospitalists, etc.) you focused on as well as the details of how you engaged them with your chapter.**

7. **What types of initiatives did your chapter conduct to recruit NEW members to join SHM?**

8. **What types of initiatives did your chapter conduct to retain EXISTING members to renew their membership?**

**Below are the goals that your chapter submitted for the 2019 calendar year. Please indicate which goals were achieved and not achieved.**

**2019 Goals**

	2019 Goals	Yes/No
1.		Choose an item.
2.		Choose an item.
3.		Choose an item.
4.		Choose an item.
5.		Choose an item.

**Please use the space below to elaborate on why your chapter did or did not meet your 2019 goals.**

**Which of the following did your chapter do in 2019 and/or is planning to do in 2020?**

	Did in 2019 and planning for 2020	Did not do in 2019, but planning for 2020	Did in 2019, but not planning for 2020	Did not do in 2019 and not planned for 2020
A one or multi-day conference or other large event	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
A member's only event	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Networking only event	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Host a Board Member or District Chair at a meeting	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
A partnership with another membership organization	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
A partnership with another SHM Chapter	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
A chapter newsletter	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Charged registration fees at a meeting	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Held a meeting for a special interest group locally (residents, students, NP/PAs, etc.)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Held a webinar/broadcasted a live meeting	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Conducted a meeting at multiple locations through technology	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Apply for Chapter Excellence Awards	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Apply for Chapter Development Funds	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Endorsed local members for (FHM/SFHM)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Conduct an abstract/poster competition	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Job Fair	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Community resource fair.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Distribute local awards	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Subsidized the cost of membership	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Discuss membership benefits at chapter meetings	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Spotlight members at a meeting	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Celebrate National Hospitalist Day	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

## 2020 Planning

### What are your Goals for 2020?

What does your chapter plan to achieve in 2020? Chapter leaders should consider goals that are SMART (specific, measurable, achievable, results-focused and time-bound). Also, consider the following when goal setting:

- How advanced is your chapter leadership structure and is there opportunity for its development?
- How can you grow your chapter’s membership?
- How can you engage your entire chapter’s membership (even those that cannot attend every meeting?)
- What new activities can your chapter implement to increase the value of membership at your chapter?

Enter each goal on the line below. Delete/add rows as needed.

	2020 Goals (Enter each goal on the line below. Delete/add rows as needed.)
1.	
2.	
3.	
4.	
5.	

### Meetings

All chapters are required to hold a minimum of 2 meetings annually that are open to all members. Chapters are encouraged to exceed minimum requirements. Please outline as much detail as possible for your 2020 meeting plans. Please list the name of the month that you plan to hold a meeting if you do not have specific dates confirmed. If you'd like to request a Board Member/OSR to attend, please indicate that below. Delete/add rows as needed.

Date/Month	Meeting Description/Topic/Speaker	CME?

### Hospital Medicine 2020

The Chapter Support Committee is planning chapter activities at Hospital Medicine 2020, April 15-18, 2020 in San Diego, California. Please indicate below how many leaders from your chapter plan to attend (best estimate).

#### Chapter Leader Training Program

April 15, 2020, 1:00 – 4:00 p.m., San Diego, CA

A free training course for existing and incoming SHM Chapter Leaders. A registration/RSVP link will be sent out to chapter leaders directly, which is separate from the HM20 registration form. The course agenda is currently being developed and will be shared with chapter leaders soon. **Content will be relevant for both new and seasoned chapter leaders.**

Estimated Number of Leaders from my Chapter: [Click or tap here to enter text.](#)

## **Chapter Leader Summit**

April 17, 2020, 6:00 – 7:30 p.m., San Diego, CA

Reception for Chapter Leaders, District Chairs and Board Liaisons to network and exchange ideas on what is happening at chapters across the country. 2019 Chapter Excellence Award Winners will be honored. Official transition of chapter leaders that are rotating on/off leadership will take place.

**Estimated Number of Leaders from my Chapter:** [Click or tap here to enter text.](#)

**Is there anything specific you are hoping for at HM20 as it relates to chapters?** [Click or tap here to enter text.](#)

**Additional information, questions or feedback for staff, your district chair or board liaison?**

