

## Appendix XI: Chapter Initiative Fund

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All Chapters of the Society of Hospital Medicine, both full and provisional, are eligible to apply for Chapter Initiative Funds.

### **Purpose**

To promote and improve the value of your chapter to your current and future members. The Chapter Initiative Fund can be used to assist in the development of new or reoccurring initiatives that aim to recruit new members to join SHM and retain and engage existing members.

### **Criteria for Submission**

- Funds must be used for the purpose of growing and sustaining the membership of your chapter, such as attracting new members, working with local hospitals or medical schools, or improving the value and quality of membership of our current members.
- Funds for events are not intended to cover total expenses but rather assist in providing a better-quality meeting, such as including a job fair, poster competition or expert speaker. Other instances will be taken into consideration during the review process by the Chapter Support Committee.
- Funds cannot be applied toward:
  - An administrative fee to those who assisted with planning of events.
  - Registration fees and travel costs for Chapter Leaders to attend the SHM Annual Conference or professional development meetings.
  - Chapter leader annual membership dues.
- The chapter must apply for funding with descriptive proposal, budget, and starting and end date for the project. The proposed project must be conducted during the next fiscal year (October – September).
- Within 30 days of using the funds, the Chapter must submit an After-Action Report to the National Office (details below).

**The Chapter Support Committee will be reviewing applications and considering them based on the following:**

- Goals are measurable and attainable within the projected timeline.
- Quality of project budget.
- The project promotes membership recruitment, retention or engagement.
- Financial need to conduct the proposed project and efforts to use alternative funding.
- Is the initiative new and innovative? Could this be shared with other chapters to implement?
- Is the project pertinent to the chapter's growth or sustainability? Health Status will be taken into consideration.

## **Application**

The Chapter Initiative Fund application will open in June and close in August each year. During this timeframe, chapters should select one leader to submit their application for funding towards chapter initiatives in the upcoming fiscal year (October – September).

The Chapter Support Committee will review all application submissions based on the criteria outlined above. Chapters will be notified of the status of their application in September. Chapter leaders may be contacted during the application review period if additional information and/or clarification is needed.

The total application budget should not exceed \$5,000. Multiple initiatives and project budgets may be included within your chapter's application for the upcoming fiscal year. The Chapter Support Committee may determine to approve one or multiple initiatives outlined within your application. A chapter may receive a maximum of \$5,000 per fiscal year.

Chapter Initiative Fund applications will only be accepted in the online form during the designated application window.

## **Feedback Form**

Within 30 days of using the funds, the Chapter must submit an After-Action Report to the National Office via the online feedback form.

At a minimum, the report must detail the activities achieved by using the funds, chapter membership before and after the initiative, attendance at events targeted by initiative and number of new members who joined as a result of the initiative.

Chapters that fail to submit the required report will:

- Be ineligible to participate in any recognition program (e.g. chapter excellence) in the current year.
- Not be eligible for future Chapter Initiative Funds for the next fiscal year.

**Submit Feedback Form:** <https://connect.hospitalmedicine.org/resources/edit-item/22/null>

## **Procedures and Timeline**

1. Chapter leaders will discuss the project plan for the upcoming fiscal year (October – September) with their leadership team.
2. Chapter leader will complete and submit a Chapter Initiative Fund application in the online form during the application window (June – August).
3. The Chapter Support Committee will review all applications during the month of September.
4. If necessary, committee members will request additional information from Chapter leadership to ensure goals defined are achievable and the timeline is appropriate.
5. Chapter leaders will be notified whether their application was approved or denied.
  - a. Example reasons for denial: Chapter has sufficient funds to complete the project; Chapter's goals are not measurable and/or achievable within a reasonable time frame.
6. If approved:

- a. SHM Staff will create a project timeline for the chapter's initiative and will work with the chapter as needed to accomplish the outlined goals.
  - b. Approved funds will be available to the chapter when the initiative takes place.
  - c. Chapters will submit the After-Action Report no later than 30 days after project is complete.
7. If denied:
- a. Chapter is encouraged to reapply for funding for the following fiscal year.

### **Guidelines for Funding**

Chapters may apply for funding for one or multiple initiatives to be conducted within the same fiscal year. The proposal should explain and justify the usage appropriately. A chapter may request up to \$5,000 in total for one or multiple initiatives each fiscal year (October 1 – September 30). Chapters may only apply for Chapter Initiative Funds during the designated application window. Applications will not be accepted on a rolling basis.

A chapter may decide to work with another chapter or chapters on a particular initiative. In these instances, one chapter leader should be selected to submit the application for funding on behalf of all participating chapters. Up to \$5,000 will be approved towards a multi-chapter initiative. Chapters may still apply for funding for additional initiatives in a separate application. Please note that \$5,000 will remain as the maximum amount of funding a chapter will receive across all initiatives. For example, if two chapters apply for \$5,000 in funding for one collaborative initiative, each chapter will have \$2,500 remaining toward other chapter initiatives if the application is approved by the Chapter Support Committee.

Please refer to the guidelines below when developing your application for funding. Chapters are not restricted to only the items referenced below and are encouraged to be innovative when developing your project plan(s). All funding requests will be reviewed and taken into consideration by the Chapter Support Committee.

### **Membership Outreach**

Chapters can apply for funding to assist with events and campaigns that promote membership and involvement in SHM. Below are suggestions for your chapter to consider when drafting your application.

- Recruitment Ideas:
  - Raffle off a free or discounted membership to someone who joins your chapter during your recruiting drive.
  - Offer a discount on membership dues to join as a new member. The discount amount, member-type, and duration will need to be determined in collaboration with SHM Staff. Staff will work with you to develop a promotional code and communication strategy.
  - Conduct a campaign to non-member attendees and RSVP's (even those that were no-shows) from upcoming and past chapter events. Email or call individuals for more

information on why they haven't joined yet. Develop a relationship with them and guide them through the pathway to join SHM.

- Obtain testimonials to demonstrate the value of SHM and local chapter benefits and share them with potential members. Testimonials can be shared at chapter events, in email promotions and on social media.
- Purchase/rent a mailing list to target potential hospitalist members in chapter's geography. Chapter must provide information on the list rental, pre-purchase, to a SHM Staff member to facilitate.
- Recruitment Events
  - Host a lunch at a hospital to discuss the benefits of membership.
  - Host an early career hospitalist event to drive residents, students and other early career hospitalists to join.
  - Target specific residency programs and/or medical schools and host a recruitment event.
  - Host a special "bring a friend or colleague" meeting featuring an ice-breaker exercise, a brief membership orientation, and refreshments. Each member must bring a friend or colleague with them to the meeting.
  - Incorporate a 2-minute talk on the value of joining SHM at regular chapter meetings. Give the presentation at the beginning of every chapter meeting. Highlight new members that have joined since the last meeting.
- Recruitment Materials
  - Printed materials: flyers, brochures, post cards, etc.
  - Giveaways/SHM Swag: branded items such as quarter-zip pull over or tumbler.
- Retention Ideas
  - Create a new member welcome campaign specific for your chapter. This could include sending a welcome letter or phone call to new members in your chapter or recognizing them at chapter events.
  - Membership Ambassador Program: provide a discount on membership dues for existing members in exchange for them recruiting new members to join.
  - Conduct a membership survey for your chapter. Select from an option of surveys that SHM's Marketing and Communications Department has drafted based on best practices. Offer an incentive for members to complete the survey to ensure a higher return rate.
  - Hold a SHM member-only event to increase the benefits of SHM membership locally. Be sure to advertise that the event is exclusive to members.
  - Broadcast your chapter events so members that cannot attend in-person can participate virtually.

### **Educational Events**

Chapters can apply for funding to receive ancillary support to host educational events. A detailed budget should be submitted in the application. This can include your best estimate on costs for the event you will be holding.

Funding can be applied toward the following:

- Food and Beverage: target cost per person is \$50-\$100 which includes alcohol if it is decided to be served. Food and beverage packages should be conservative (please see the Finance section of Chapter Handbook for more guidance on SHM policy).
- Speaker Fees: includes set speaker fees, honorariums and travel-related expenses. These should be pre-determined with the speaker prior to the event and included in the total event budget.
- Meeting Space Rental: charges associated with renting a specific venue or room at a venue
- A/V Rental: charges associated with renting A/V equipment to enhance the attendee experience
- Other event-associated charges will be considered by the Chapter Support Committee. This could include charges such as poster board rentals for poster competitions ultrasound equipment for POCUS workshops.

### **Scholarships**

Chapters can apply for funding to be allocated towards a scholarship opportunity for members. Below are considerations:

- Present a scholarship to the top-scored abstracts in your chapter's local RIV Abstract/Poster Competition. Scholarships typically include registration costs for SHM's annual conference and/or travel-related expenses.
- Scholarship program for students and residents: provide assistance on membership dues and/or costs to experience an SHM annual conference.
- Scholarship program for APPs: sponsor an APP to attend an SHM annual conference or NP/PA Bootcamp. Allow them to present what they've learned at an upcoming chapter meeting.
  - APP Exchange Program
- Establish a localized awards program for members to be recognized. Funding can be applied towards scholarships for awardees and be recognized throughout the chapter community.

### **Technology**

Chapters can apply for funding to purchase equipment to enhance the member experience at chapter events. Be advised that all chapters have access to SHM's GoToWebinar account to utilize for broadcasting meetings. Because of this, funding will not be allocated toward other streaming services. All equipment purchased for the chapter is the property of SHM and is to be used only for chapter-business purposes. The chapter will need to follow the policy and procedure outlined in the Finance Section of the Handbook when making equipment purchases.

Below are examples of equipment:

- Projectors
- Microphones
- Teleconferencing Equipment (speaker, camera)

Tab 1: Chapter

**Chapter:**

**Your Name:**

**Your Email:**

Tab 2. Project Info

**Project Title:**

**Anticipated Project Start Date (no sooner than October 1, 2020):**

**Anticipated Project End Date (no later than September 30, 2021):**

Tab 3: Meeting Goals

**Goal Statement: When describing your goal, ensure that it follows SMART guidelines as it will be evaluated with this rubric. SMART goals are:**

- Specific: describe exactly what is to be accomplished and how.
- Measurable: what objective criteria will be measured and how.
- Achievable: ensure this is realistic and can be accomplished in terms of resources and timing.
- Results-focused: your goal must fit into the mission and vision of SHM
- Time-bound: specific the completion date for the attained goal.

When crafting your goal statement, please identify each of the above carefully and then assemble in a single sentence as concisely as possible using the SMART aspects defined above.

Tab 3: Success Measures

**How will your chapter measure success? Please be specific.**

Tab 4: Project Timeline

**Please provide a project timeline, noting specific dates when planned activities will take place.**

Tab 5: Budget

**Project Budget. How will the requested funds be spent on your planned activities? Please provide a line item budget your all project expenses.**

Tab 6: Other Details

**Which chapter activities (if any) have been completed to increase membership so far? What were the results?**

**Other notes and comments.**

**Upload File (if needed)**

**Submit**