

Appendix XII: Chapter Start-up Fund

All new chapters of the Society of Hospital Medicine are eligible to apply for Start-Up Funds to support the chapter's early initiatives. [Apply here.](#)

Purpose

The Chapter Start-Up Fund can be used to provide a financial buffer to get your chapter up and running with its primary activities as well as assist with the growth, value and sustainability of membership.

Criteria for Submission

- Funds for inaugural events should be ancillary to the funding the chapter is able to receive through confirmed exhibitor displays. Funds are not meant to cover total expenses but rather to provide a better-quality inaugural meeting. The Chapter Support Committee realizes it may be more difficult to secure funding for the first chapter meeting compared to others and will take all instances into consideration when reviewing the application.
- Funds must also 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. Chapters should consider budgeting a membership drive into their application.
- 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 a descriptive project plan on the chapter's activities planned for the inaugural year.
- Within 30 days of using the funds, the Chapter must submit an After-Action Report to the National Office (details below).

Application

Applications will be accepted on a rolling basis for the Chapter Start-Up Fund. New chapters have up to one-year since receiving Provisional Status recognition to apply.

Chapters should select one leader to submit the application. Chapters should expect to be notified of approval within one month of the application submission date. Chapter leaders may be contacted sooner for additional information and/or for clarification purposes. Once approved, the Start-Up Funds will be available to the chapter for its approved planned activities.

During the application process, chapters may choose to elect for a Chapter Support Committee member to be assigned as your chapter's mentor. Your mentor will be available to provide guidance as needed throughout your inaugural year.

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 complete and submit a Chapter Start-Up Fund application online.
2. SHM Staff will assign the application to two Chapter Support Committee members within one to three business days.
3. If necessary, committee members will request additional information from the chapter leadership to ensure goals defined are achievable and the timeline is appropriate.
4. Committee members will approve an application within three to four weeks of receipt and notify the chapter leadership.
5. If your chapter elected to have a mentor assigned, a member of the Chapter Support Committee will reach out within 2-3 after the application review process.
6. When approved:
 - a. SHM Staff will create a project timeline for the chapter's initiative and assist your chapter in accomplishing the outlined goals.
 - b. Approved funds will be available to the chapter when activities take place.
 - c. Chapters will submit After-Action Reports no later than 30 days after project is complete.

Guidelines for Funding

Chapters may apply for funding for one or multiple initiatives to be conducted within the first year of receiving Provisional Status from SHM. After the first year, chapters will become eligible for additional funding through the Chapter Initiative Fund. Please review the Chapter Initiative Fund guidelines for more information.

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. 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 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.

Start-Up Fund Application for New Chapters – Example Application

Tab 1: Chapter

Chapter: Example SHM Chapter

Your Name: Lisa Kroll

Your Email: lkroll@hospitalmedicine.org

Tab 2. Project Info

Project Title: Chapter Start-up Funds

Inaugural meeting date: November 15, 2019

Tab 3: Meeting Goals

In order to receive start-up funds, chapters must have goals determined for their first meeting.

Input Inaugural Meeting Attendance Goal: 30

Please explain how you plan to achieve this attendance goal: The chapter will recruit hospitalists to attend this meeting by utilizing support from the National Office to promote the meeting details to all members and non-members in the membership database living in our chapter's geography. Additionally, each member of the chapter leadership will recruit our colleagues and help spread the word to all local hospitals in the area.

Other Inaugural Meeting Goals (i.e. have a board member attend, # of Exhibitors, membership drive, etc.): For our inaugural meeting, we would like to have a SHM Board Member present if possible. Additionally, we plan to recruit 3 exhibitors to attend the meeting. Lastly, we plan to conduct a membership drive at our meeting to advertise the benefits of SHM membership, and recruit 5 new members to join at a discounted rate.

How do you plan to achieve these additional goals?

We will reach out to our chapter's board liaison to determine if he/she is available to attend. We will utilize the National Exhibitor Contracts if possible as well as conduct outreach to local representatives in the area. We will utilize development funds to help offset the cost of membership for non-members to join SHM. We will spend a few minutes at the start of the meeting discussing the benefits of SHM.

Tab 4: Budget

A maximum of \$5,000 will be provided to new chapters to go towards start-up activities. Please explain to the Chapter Support Committee how the funds will be utilized (i.e. catering, A/V, honorarium, SHM membership recruitment)? Please list items in a line-item format.

- Catering (estimated \$60/person): \$1,800
- A/V/Room Rental: \$500
- SHM Membership Discount 25%: ($\$445 \times 20\% = \89) - $\$89 \times 5$ new members = \$445
- Remaining Funds: will be utilized towards additional membership recruitment and/or 2nd chapter meeting expenses = \$2,255

Tab 5: Submit