

A woman with short dark hair, wearing sunglasses on her head and a striped blazer, is smiling while looking at her smartphone. She is wearing a lanyard with a badge. In the background, another person is visible, and the setting appears to be a hospital or medical facility. The entire image has a blue color overlay.

shm[®]
Society of Hospital Medicine

Chapter Handbook

Updated February 2023

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Introduction

The Society of Hospital Medicine (SHM) represents the fastest-growing specialty in modern healthcare, reflecting the strength and vibrancy of the hospitalist movement. In part, SHM's growth stems from the desire of individual hospitalists to identify with the broader hospital medicine movement.

As a Chapter Leader, you have a very important role in SHM's national organizational structure. You serve the dual role of managing your local chapter and representing your constituents to your District Chair while also serving as the point of contact in the two-way flow of information between SHM National and your local chapter.

SHM reviews the health status of each chapter on an annual basis, ensuring that baseline requirements are met, thereby maintaining the chapter's full chapter status recognition. Full status chapters that fall short of the baseline requirements will move into provisional recognition, providing the chapter with one year to meet all full status requirements. Chapters that do not meet full status requirements after this period will be dissolved and are invited to reapply for recognition at a later date. The annual health status evaluation is done in an effort to ensure that local hospitalists can be confident that affiliation with their local chapter will provide meaningful education, networking, and leadership opportunities while receiving a high-quality experience worthy of their limited time.

SHM expects each of its chapters to serve as a vehicle for:

- Networking with other hospitalists in their community;
- Learning from peers to improve the quality of practice in both clinical and administrative aspects;
- Conveying information about important national initiatives, trends, policy issues, and events.

In addition, each SHM chapter should aim to:

- Increase overall membership growth and satisfaction;
- Generate new ideas for programs and initiatives;
- Identify and engage future leaders of the hospital medicine movement;
- Enhance the professional and public perception/profile of hospital medicine.

By meeting the above objectives, a strong local chapter can serve as a bridge between individual hospitalists and SHM, the national organization for hospitalists.

This SHM Chapter Handbook has been created as a reference guide for you and your local chapter. To make it easier to use, the handbook is divided into sections so you can quickly find the information you need.

Starting a new position as a Chapter Leader can be overwhelming. The goal of this handbook is to provide you with important information pertinent to your role as a Chapter Leader. Please read through this handbook to familiarize yourself with all sections. You will also want to refer to it throughout your time as a Chapter Leader.

We wish you and your chapter much success this year! If you have any questions, please contact chapters@hospitalmedicine.org.

Acknowledgments

The SHM National Office wishes to acknowledge and thank the Chapter Support Committee that works diligently to generate and grow resources for the chapter program.

It is often said, and rightly so, that membership is the most important aspect of an association. The Chapter Support Committee plays a key role in helping the association reach its recruitment and retention goals. At SHM, the chapters work hand-in-hand with the Membership Department to increase the association's membership and engage those members at the local level. SHM is fortunate to have dedicated committee members who work tirelessly to increase membership through improved local interactions.

Chapter Support Committee

The charge of the Chapter Support Committee is to provide the Society's chapters with an effective foundation and platform for success, consistent with SHM's mission, vision, values, and goals. Beginning with the 2023-2024 term year, members of the committee consist of the 12 District Chairs.

SHM National Office

The SHM National Office employs staff members to manage the chapter program from its offices in Philadelphia, Pennsylvania.

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Please see [Appendix I](#) for staff travel policy for chapter meetings.

SHM Structure

The Society of Hospital Medicine is the only national association entirely devoted to hospital medicine. SHM's membership is comprised of a diverse mix of physicians, nurse practitioners, physician assistants, practice administrators, affiliates (practitioners working in hospital medicine including healthcare policy analysts, medical librarians, etc.), allied health professionals (registered nurses, hospital pharmacists, and other practitioners working in hospital medicine), residents, fellows, medical students, and international members.

SHM's mission statement reads:

"SHM promotes exceptional care for hospitalized patients."

Chapter membership consists of all active, dues-paying members of the Society of Hospital Medicine with a primary address in the chapter's assigned geographical area. Members are automatically assigned to a chapter based on their primary address. The purpose of the chapter is to:

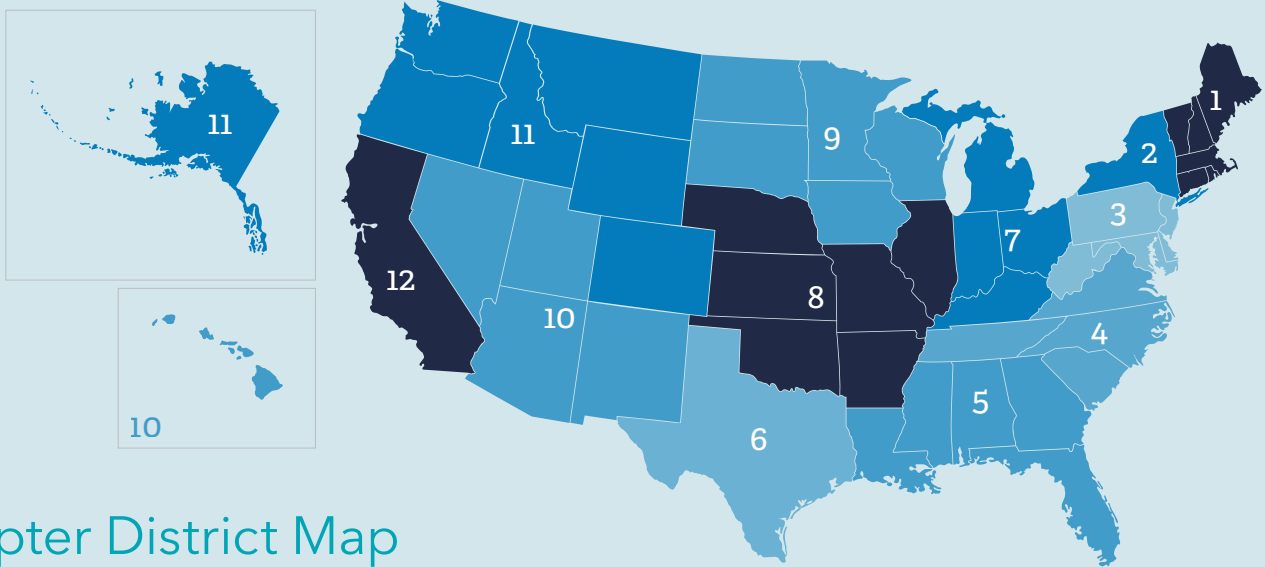
- Promote the mission of the association to local hospitalists;
- Educate, inform, and involve local members in the activities of the association;
- Provide local members with representation by reporting local activities to the District Chair.

SHM chapters are not separately incorporated from the Society and are managed by the SHM National Office in Philadelphia, Pennsylvania. There shall not be more than one SHM chapter representing a specific geographical territory, and all chapter territories must be contained within one district.

Chapters are grouped into 12 geographical districts (see [Appendix II](#) for a list of chapters in each district). Each district is represented by a District Chair who serves to report on local chapter business to the SHM National Board of Directors.

District Chairs are appointed by the President of the SHM National Board of Directors. District Chair positions are one-year terms that are renewable for up to four years (see [Appendix II](#) for additional information).

Please visit www.hospitalmedicine.org/chapters for a current listing of chapters. You can also find them listed in [Appendix II](#) of this handbook.



Chapter District Map

Keeping Informed

Chapter Leaders should become familiar with the **Chapter Leader Community within SHM’s Hospital Medicine Exchange (HMX)**.

This community is exclusive to Chapter Leaders and should be utilized for the following:

- Networking with other SHM Chapter Leaders by starting discussions;
- Submitting required forms to the SHM National Office (Meeting Notification Form);
- How-to’s, such as How to Utilize Eventztila (RSVP management tool) and How to Utilize Zoom (for virtual meetings);
- Membership Applications and other marketing materials;
- Webinar trainings;
- And other resources, including updates from the SHM National Office.

Working with Your District Chair

The role of the District Chair is to coordinate and cultivate all chapters within the geographical bounds of the district. The District Chair also represents the chapters within the district to the SHM Board of Directors.

District Chairs oversee the entire membership in their assigned district including those with chapter representation and those without. They support/mentor existing chapters and assist staff in cultivating new ones.

District Chairs receive a Health Status and Membership Report for chapters within their district. They also receive a copy of each chapter’s Goals and Meeting Plan.

District Chairs should act as mentors to current and future Chapter Leaders.

District Chairs may attend chapter meetings within the district as frequently as their schedule allows, coordinating with the Board who also travels to meetings.

District Quarterly Meetings

All Chapter Leaders are required to attend a quarterly meeting with their District Chair and an SHM staff member. Chapter Leaders only need to attend their own district’s meetings. The agenda will include updates from SHM National and updates from each chapter on their existing goals, successes, and struggles. At least one Chapter Leader from each chapter must be in attendance at every meeting.

Board Liaisons

Each member of the SHM National Board is a liaison to one chapter district. The Board Liaison reviews the District Report of the chapter’s health and membership and provides strategic oversight with the District Chair.

When possible, Board Liaisons will attend district calls.

Board Liaisons will attend as many chapter meetings as possible each year as a mentor or speaker. The Board can visit chapters inside and outside their assigned district with no expense to the chapter. (See [Appendix III](#) for a list of Board Liaisons by chapter.)



Where Do I Begin?

The remainder of this handbook is divided into sections for easy reference. We encourage you to review these sections as you continue to build and strengthen your chapter. The sections and their respective content are as follows:

Chapter Requirements

Learn about the requirements to apply for provisional chapter status and to receive and maintain full chapter status. (Pages 6-17)

Membership

Learn more about the benefits of SHM membership and how to communicate those benefits to local hospitalists. Also, details are provided on the process for remittance and membership drives. (Pages 18-22)

Marketing and Communications

Learn about the marketing and communication opportunities each chapter can employ to promote programs and events. (Page 23)

Chapter Organization and Leadership

Learn what positions each chapter should have and the job descriptions for each, as well as how to develop your chapter's bylaws. (Page 28)

Finances

Learn the basics of managing your chapter's finances, including developing a budget and soliciting exhibitor support. (Page 31)

Exhibiting at Chapter Meetings

Review exhibitor requirements and learn about exhibitor management and how to manage exhibitor relationships. (Page 36)

Activities

Find ideas for all types of activities at your chapter, including recruitment, educational, advocacy, social, and community events. (Page 45)

Advocacy

Learn how to position your chapter as an advocate for hospital medicine. (Page 49)

Appendices

Quick references to the SHM organizational structure, member benefits, important deadlines, and more.



Chapter Requirements

This section provides information on how to establish a new chapter and receive provisional recognition, move from a provisional to a full status chapter, and maintain full status recognition once received.

Applying to Become a Chapter

In order to be recognized as a full status chapter of SHM, chapters must first apply for provisional recognition. This is achieved by meeting the provisional recognition requirements and submitting an application to the SHM National Office for review and approval.

Provisional Recognition Requirements

Leadership	Identify at least two founding members who agree to be responsible for all chapter formation responsibilities. They must be current members of SHM. (Formation responsibilities are described later in this section.)
Define Chapter's Geography	<p>Determine what geographical area of hospitalists your chapter will represent. SHM's existing chapters are made up of statewide, city/metro area, and multi-state chapters (see below). Chapters with large geographical representation should rotate locations of meetings and designate hospitalists from multiple institutions/locations to sit on the chapter's leadership.</p> <ul style="list-style-type: none">• Statewide Chapter: represents all members within state borders.• City/Metro Area: represents members within one specific metropolitan area. Provide a list of counties for defined geography.• Multi-State: represents members within more than one state. It does not necessarily need to represent entire states. Provide a list of counties for defined geography.
Meetings	Chapters are required to hold a minimum of two meetings that are open to all SHM members in your chapter per calendar year. A description of what constitutes a chapter meeting can be found on page 8. In your chapter application, you will be asked to submit a work plan for the first year, listing when you plan to hold your meetings, potential topics, ideas for outreach, and overall goals for your chapter.
Demonstrated Interest	New chapter applicants must have a petition signed by a minimum of 10 hospitalists from at least two institutions. See Appendix IV for an example petition.

Receiving Provisional Recognition

Once your application and ancillary information to start a new chapter has been received by the SHM National Office, staff will take the following measures to establish your chapter formally as a provisional SHM chapter:

Application Review, which includes:

- **Founding Leaders Membership Verification:** Staff will verify that all hospitalists listed within the application are current, dues-paying members of SHM. Anyone who is not an active member will be contacted by staff to join SHM or renew their membership. The application will not move forward until all leaders listed on the application have an active membership.
- **Geographical Review:** Staff will ensure that the proposed chapter geography does not overlap with any existing chapters and falls within one district. If there is overlap with an existing chapter, staff will consult with the Chapter Leaders to determine which chapter better serves that area.
- **Meetings:** Staff will ensure that the applicant's work plan includes at least two meetings for the upcoming calendar year.
- **Demonstrated Interest:** Staff will review the petition and ensure that it includes a minimum of 10 hospitalists' signatures from at least two institutions.



Approval Notification

Staff will notify the founding leaders listed on the application that their application for provisional recognition has been approved or requires revision based on the requirements above.

Once Approved

Staff will take the following measures to set up your chapter as a formal provisional chapter:

Chapter Roster: All members and non-members (prospects) who are within the geographical boundaries of your chapter will be assigned to your chapter and a roster will be formalized. All promotional emails for meetings will be sent to your chapter roster by the SHM National Office. In some cases, emails may only be sent to SHM members on your roster (e.g., information about elections, member-only meetings, newsletters).

Funds for Chapter Activities: The SHM National Office will manage all funding and expenses for your chapter's activities. Please see Finances section on page 31 for additional information on how to acquire funding, budgeting for meetings, and spending guidelines.

Chapter Information on HospitalMedicine.org: Your chapter will be listed on the SHM chapter page listing for your home state and neighboring regions if applicable. Visit the SHM Chapters page at www.hospitalmedicine.org/chapters.

Chapter Community Page in Hospital Medicine Exchange (HMX): Your chapter will also have its own page in the Hospital Medicine Exchange (HMX) that will be linked directly from the chapter's homepage on hospitalmedicine.org. The community page will include information about your chapter including geography, leadership, events, files (e.g., chapter newsletters), photos (e.g., from events), and a discussion area.




Chapter Leaders can submit content to their own communities by starting discussions, adding files, or adding photos. Please reference the Marketing and Communications section of the handbook on page 23 for additional information.

Schedule a Formation Call: Staff will schedule a teleconference with the Chapter Leaders to discuss volunteer formation responsibilities and staff support, and to assist with the planning of the chapter's inaugural meeting.

Announcement of Chapter Formation: After your chapter's roster has been set up and your Chapter Community page is live on the Hospital Medicine Exchange (HMX), the SHM National Office will send an email out to your chapter roster announcing the formation of your chapter. The purpose of this email is to inform members that they now have a local SHM chapter and can expect to receive information about upcoming meetings and events. The email will include Chapter Leader names, geography, and inaugural meeting information, if available.

Inaugural Meeting

It is recommended that the chapter plan its first meeting at least two to three months in advance of its occurrence. Most chapter meetings run two to three hours, occur during the week (Monday–Thursday), and are held in the evening over dinner. Neutral venues located among all local hospitals, such as an easily accessible restaurant, are recommended. The following agenda is suggested for your first meeting:

	One Hour Networking hour with exhibitors
	Half Hour Welcome, introduction of founding leaders, discussion about chapter goals and plans for the chapter's first year
	One Hour Educational presentation (optional), dinner

Chapter Requirements

The following steps are recommended for planning your inaugural chapter meeting:

1. Decide on a timeframe for your first meeting and whether you want to include an educational presentation.
2. Research venue options. Restaurants that are centrally located to members work best for chapter meetings. When making your selection, be sure to ask if the venue has a private room, projector/screen, microphone (not always needed), and space for exhibitor tables.
3. If you are going to have an educational presentation, keep the date of your meeting flexible until you have your speaker/topic selected and have confirmed the speaker's availability.
4. Once you know your speaker's availability, confirm a date and time for your meeting with the venue.
5. Contact an SHM staff member to review and sign the event agreement with the venue and also to set up direct payment. (Note: Chapters cannot sign contracts with any vendors or venues. All contracts must be reviewed and signed by SHM staff.)
6. Develop an agenda for the meeting (see recommendation above).

7. Provide information to staff to solicit exhibitors. You will want exhibitors to display during the networking portion of your meeting in order to offset the costs of the meeting. Utilize the National Exhibitor Contracts (see the Exhibiting at Chapter Meetings section of this handbook) or work with staff to send exhibit requests to your local representatives.
8. Once the details of your meeting have been confirmed, submit them to the SHM National Office (required) [via the Meeting Notification Form on Hospital Medicine Exchange \(HMX\)](#). Once received, staff will promote your meeting in your chapter's community on HMX and via email to your chapter's roster.

Receiving Full Chapter Status Recognition

Chapters DO NOT need to complete an application for full chapter status recognition. Staff will make recommendations to the SHM Board of Directors annually for approval of full recognition status if the criteria below are met within one year of establishment. If the criteria below are not met, staff will recommend that the chapter either reapply for provisional recognition or that the chapter receive full recognition pending the completion of any outstanding criteria.

Leadership: While only two founding members are required to start a chapter, you must have a minimum of three dues-paying member leaders with defined roles (President, President-Elect, Treasurer/Secretary) and terms for those positions (e.g., two years) in order to achieve full chapter status. Please see the section in this handbook titled Chapter Organization and Leadership for more information and guidance.

District Calls: At least one Chapter Leader must be present on every chapter district call throughout the year.

Meetings: The chapter must hold at least two meetings in its first year.

Demonstrated Interest: At least 25 hospitalists from a minimum of three institutions must support your chapter's activities. This can be shown by the sign-in sheets at the two meetings held during the year or through a signed petition.

Maintaining Full Status Recognition

Chapters are evaluated on an annual basis, and reports are sent to the SHM Board of Directors for the March/April board meeting. District Chairs also receive a copy of the report to determine how chapters in their district are performing and how they can provide mentorship to those chapters. The report will be based on the chapter's ability to maintain requirements listed below, including timely submission of the Annual Goals and Meeting Plan Document and the Activity Report.

Maintaining Requirements

Leadership: The chapter maintains a minimum of three leadership positions filled by current dues-paying members of SHM. The positions must have defined roles and terms that begin and end with the SHM Annual Conference. All SHM chapters follow the same election cycle, as described in the [Chapter Organization and Leadership](#) section.

District Calls: At least one Chapter Leader must be present on every chapter district call throughout the year.

Meetings: The chapter must hold at least two meetings each calendar year.

Administration: The chapter must submit a Meeting Notification Form for every meeting held. While registration will be set up for chapters by SHM staff, Chapter Leaders are responsible for checking in attendees on-site at in-person events. Attendee check-in must be conducted through Eventzilla for all non-paid events.

Annual Goals and Meeting Plan Document and Activity Report

Goals and Meeting Plan Document: Chapter Leaders need to complete the Goals and Meeting Plan Document and should consider this their road map for the year. Chapter Leaders will be prompted by SHM staff for the report which should be submitted to staff approximately one month after the annual conference. This document should help define the chapter leadership's goals for the upcoming year as well as the types and timing of events they plan to hold. See [Appendix V](#) for an example of this document.

Chapter Leaders should consider goals that are SMART (specific, measurable, achievable, results-focused and time-bound) and will support the chapter achieving a healthy status. Consider the Chapter Health Status Categories below when determining goals:

- **Leadership:** does the existing leadership have defined roles with terms and a succession plan written? Does the chapter need to conduct elections this fall and thus recruit members to get involved? How advanced is your chapter leadership structure and is there opportunity for its development?
- **Chapter Membership:** how can the chapter support membership growth over the next year?



- **Chapter Meetings:** what type of meetings will the chapter organize this year? Will there be a focus on particular topic areas or member constituents? Is there something new the chapter would like to try this year?
- **Leadership:** does the existing leadership have defined roles with terms and a succession plan written? Does the chapter need to conduct elections this fall and thus recruit members to get involved? How advanced is your chapter leadership structure and is there opportunity for its development?
- **Chapter Membership:** how can the chapter support membership growth over the next year?
- **Engagement with Nationally Provided Programs:** how will the chapter engage with nationally provided programs? Will you apply for Chapter Excellence Awards, Initiative Funding, and/or support local members by endorsing them for fellows or Awards of Excellence? Will the chapter incorporate CME (through SHM) and leverage national exhibitor contracts at meetings?
- **Engagement for SHM Constituents:** what types of initiatives will the chapter carry out to engage SHM members? What new activities can your chapter implement to increase the value of membership? How can you engage your entire chapter's membership (even those that cannot attend every meeting?)
- **Membership Recruitment:** What types of initiatives will the chapter carry out to recruit prospective members to join SHM and get involved with the chapter?
- **Membership Retention:** What types of initiatives will the chapter carry out to retain existing SHM members and ensure they renew their membership?

When developing a meeting plan for the year, Chapter Leaders should consider how many meetings they will hold (minimum of two per calendar year) and when they will take place. Additionally, consider what types of events they will be, the topic(s), and whether you will want to apply for CME. Chapter Leaders should indicate requests for an SHM Board Member or the CEO to speak at an event.

Activity Report

Chapter Leaders are responsible for completing the Activity Report as a follow-up to their previously submitted Goals and Meeting Plan, noting all accomplishments that took place during the calendar year. The information provided in the Activity Report will be used as part of the chapter's annual health status evaluation. Chapters will not be penalized for not achieving their pre-set goals and meeting plans so long as they have met the minimum health status requirements for the calendar year. Chapter Leaders will be prompted for the Activity Report and it should be submitted to SHM staff in early December.

Health Status Evaluation

A chapter's health status is reported annually based upon an evaluation of the chapter's meeting of requirements to maintain recognition and carry out the SHM mission. All data that comprises a chapter's health status report is shared with Chapter Leaders, District Chairs, and Board Liaisons and discussed at the SHM Board of Directors meeting in the spring each year.

A health status evaluation is contingent on each chapter's timely submission of the Annual Goals and Meeting Plan Document and the Activity Report. Chapters will utilize these documents to plan for the upcoming year and self-assess from the year prior. Upon submission of the end-of-year Activity Report, a health status evaluation will be conducted and shared with each chapter's leadership.

Chapters that receive a higher health status will have a lower barrier to receiving a Chapter Excellence Award, SHM's annual award program to recognize outstanding work conducted by chapters to carry out the SHM mission locally. The Chapter Support Committee revamped the Chapter Excellence Award Program in 2019 to align with chapter health. Please see the Chapter Excellence Award Program description in [Appendix VI](#) for more information.

There are six categories of health status into which a chapter can fall. The factors that comprise the makeup of these categories are described on the following pages.

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, trainings at the annual conference and webinars.

Admin: Meeting notification forms are submitted in a timely manner. Attendance collection through Eventzilla and/or Zoom platforms.

Annual Goals and Meeting Plan Document and Activity Report: Submitted to SHM National Office annually in template provided to chapters, strategic planning meetings conducted by chapter leadership.

Chapter Membership: SHM dues-paying members living in 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 are not limited to, applied-for excellence awards, initiative/start-up funds, CME (through SHM), participating in chapter challenges, utilizing national exhibitor packages, engaging on HMX, supporting chapter members in applying for SHM Fellows program, nominating members for SHM Awards of Excellence, etc.

Engagement Initiatives for SHM Constituents: Examples of engagement include, but are 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. Mentorship programs, job fairs, scholarships, local award programs and other similar engagement initiatives are included 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 membership are discussed, and other membership-focused initiatives.

Description of Chapter Activity per Category in Each Health Status

Purple Health Status Chapter

New chapters with provisional status

This category describes all new chapters that are in provisional status for more than 75% of the year prior. For example, if a chapter receives full recognition in October, it will still receive a Purple Health Status for that same calendar year. Below is a description of likely activity from a Purple Health Status chapter.

- **Year Prior Health:** Chapter did not have a health status as it was not yet formed.
- **Years Established:** 0+
- **Leadership:** Minimum of two active leaders. Chapter needs three active leaders with defined roles and terms to reach full chapter status.
- **Leadership Training:** Chapter attended all quarterly district calls after provisional recognition was received.
- **Admin:** Chapter is working with staff to learn the meeting notification system.
- **Annual Goals and Meeting Plan Document and Activity Report:** Chapter is not required to submit the Goals and Meeting Plan Document the year they receive provisional recognition from SHM as this information should be detailed on the application. The chapter is only required to submit the Activity Report if provisional recognition was received before September of the current year.
- **Chapter Membership:** Overall chapter membership numbers are shared with leadership. Leadership should begin discussing ways to increase membership.
- **Chapter Meetings:** Chapter held one or no meetings last calendar year.
- **Engagement with Nationally Provided Programs:** Chapter is learning about nationally provided programs and may or may not have begun to engage.
- **Engagement Initiatives for SHM Constituents:** Chapter may or may not have implemented an initiative to engage SHM constituents.
- **Membership Recruitment and Retention:** Chapter may or may not have conducted recruitment or retention initiatives.

Blue Health Status Chapter

Full status chapters that are well established and going above and beyond requirements

This category describes all full status chapters that have been well established for more than three years, have a developed leadership structure that meets regularly and participates in trainings, submit all administrative requirements in a timely matter, have conducted initiatives to recruit, retain, and engage members that have driven the overall chapter membership to increase, have held a robust number of meetings, and are engaged with nationally provided programs. Below is a description of how a Blue Health Status chapter performs in each category.

- **Year Prior Health:** Chapter health was Blue or Green status the year prior.
- **Years Established:** 3+
- **Leadership:** Robust leadership structure with defined roles, terms, and succession plan written (preferably in the bylaws template).
- **Leadership Training:** Attends all training opportunities provided by SHM.
- **Admin:** Chapter submitted all meeting notification forms and meeting reports in a timely manner. Attendance for in-person events was collected through Eventzilla and through Zoom for virtual events.
- **Annual Goals and Meeting Plan Document and Activity Report:** Leadership meets regularly to discuss goals and meeting plans for chapter's longevity. Chapter submitted the Goals and Meeting Plan Document and the Activity Report on time to SHM staff.
- **Chapter Membership:** Overall chapter membership has increased in the past year.
- **Chapter Meetings:** Chapter holds four or more meetings in calendar year, or chapter holds one multi-day conference and two additional meetings.
- **Engagement with Nationally Provided Programs:** Chapter has engaged with at least four nationally provided programs.
- **Engagement Initiatives for SHM Constituents:** Chapter has conducted at least two engagement initiatives for SHM constituents.
- **Membership Recruitment and Retention:** Chapter has completed at least one recruitment and one retention initiative.

Green Health Status Chapter

Full status chapters that are meeting all requirements

This category describes all full status chapters that may or may not be young or seasoned, have a defined leadership of three or more members that meets at least once a year, participate on the quarterly district calls, submit all administrative requirements in a timely manner, have conducted at least one engagement initiative and one recruitment or retention initiative that has sustained the overall chapter membership, have held two to three chapter meetings, and are engaged with nationally provided programs. Below is a description of how a Green Health Status chapter performs in each category.

- **Year Prior Health:** Chapter health was Blue, Green, Yellow, or Orange status the year prior.
- **Years Established:** 2+
- **Leadership:** Minimum of three active leaders with defined roles, terms, and a succession plan.
- **Leadership Training:** At minimum, the chapter attended all quarterly district calls. Chapter may have also attended training at the annual conference or a webinar opportunity.
- **Admin:** Chapter submitted all meeting notification forms and meeting reports in a timely manner. Attendance for in-person events was collected through Eventzilla and through Zoom for virtual events.
- **Annual Goals and Meeting Plan Document and Activity Report:** Leadership meets at least once a year to discuss chapter annual goals and meeting plans. Chapter submitted the Annual Goals and Meeting Plan Document and the Activity Report on time to SHM staff.
- **Chapter Membership:** Overall chapter membership was sustained in the past year.
- **Chapter Meetings:** Chapter holds two to three meetings per calendar year, or chapter holds one multi-day conference and one additional meeting.
- **Engagement with Nationally Provided Programs:** Chapter has engaged with at least two nationally provided programs.
- **Engagement Initiatives for SHM Constituents:** Chapter has conducted at least one engagement initiative for SHM constituents.
- **Membership Recruitment and Retention:** Chapter has completed at least one recruitment or one retention initiative

Yellow Health Status Chapter

Full status chapters that are meeting most requirements

This category describes all full status chapters that may or may not be young or seasoned; have a leadership of three or more members that may or may not have defined roles and attend some but not all of the training opportunities; are missing meeting notification forms, attendance lists, and/or are not submitting them in a timely manner; are submitting annual goals and work plan documents that may or may not be on time or thoroughly completed; may or may not have conducted recruitment, retention, or engagement initiatives and overall chapter membership has possibly declined; are participating in at least one nationally provided program; and have held two to three meetings in the past calendar year. Below is a description of how a Yellow Health Status chapter performs in each category.

- **Year Prior Health:** Chapter health was Blue, Green, Yellow, or Orange status the year prior.
- **Years Established:** 1+
- **Leadership:** Minimum of three active leaders, but they may not have defined roles, terms, and a succession plan.
- **Leadership Training:** Chapter is attending some quarterly district calls and/or other training opportunities.
- **Admin:** Chapter has not submitted all meeting notification forms and meeting reports in a timely manner and/or has not collected attendance through Eventzilla and Zoom.
- **Annual Goals and Meeting Plan Document and Activity Report:** Chapter has submitted the annual Goals and Meeting Plan Document and the Activity Report. It may have been late, or not thoroughly completed.
- **Chapter Membership:** Overall chapter membership may have declined in the past year.
- **Chapter Meetings:** Chapter holds two to three meetings per calendar year, or chapter holds one multi-day conference and one additional meeting.
- **Engagement with Nationally Provided Programs:** Chapter has engaged with at least one nationally provided program.
- **Engagement Initiatives for SHM Constituents:** Chapter may or may not have implemented an initiative to engage SHM constituents.
- **Membership Recruitment and Retention:** Chapter may or may not have conducted recruitment or retention initiatives.

Orange Health Status Chapter

Struggling chapters that have been moved to provisional status

This category describes all provisional status chapters that were previously full status but have declined due to a struggling previous year; have one to two active leaders who may or may not be attending trainings; are missing meeting notification forms, attendance lists, and/or are not submitting them in a timely manner; are submitting an annual goals and work plan document that may or may not be on time or thoroughly completed; may or may not have conducted recruitment, retention, or engagement initiatives and overall chapter membership has declined; may or may not be participating in a nationally provided program; and have held one or no meetings in the past calendar year. Below is a description of how an Orange Health Status chapter performs in each category.

- **Year Prior Health:** Chapter health was Blue, Green, Yellow, or Orange status the year prior.
- **Years Established:** 1+
- **Leadership:** Chapter has one to two active leaders.
- **Leadership Training:** Chapter could or could not be attending quarterly district calls and other training opportunities.
- **Admin:** Chapter may or may not be submitting required meeting forms.
- **Annual Goals and Meeting Plan Document and Activity Report:** Chapter has submitted the Goals and Meeting Plan Document and the Activity Report. It may have been late, or not thoroughly completed.
- **Chapter Membership:** Overall chapter membership may have declined.
- **Chapter Meetings:** Chapter held one or no meetings last calendar year.
- **Engagement with Nationally Provided Programs:** Chapter may or may not be engaging with any nationally provided programs.
- **Engagement Initiatives for SHM Constituents:** Chapter may or may not have implemented an initiative to engage SHM constituents.
- **Membership Recruitment and Retention:** Chapter may or may not have conducted recruitment or retention initiatives.

Red Health Status Chapter

Struggling chapters that have shown no sign of revitalization

This category describes all provisional status chapters that were Orange Health Status the previous year and will be sunsetted due to no forward progression of the chapter being revitalized. Below is a description of how a Red Health Status chapter performs in each category.

- **Year Prior Health:** Chapter health was Orange the year prior. Chapter will be sunsetted and must re-apply for provisional chapter status.
- **Years Established:** 0+
- **Leadership:** Chapter has no active leaders or leaders are unresponsive to communications.
- **Leadership Training:** Chapter is not attending all district calls or training opportunities.
- **Admin:** Chapter is not submitting meeting forms (or is not holding meetings at all).
- **Annual Goals and Meeting Plan Document and Activity Report:** Chapter has not submitted the Goals and Meeting Plan Document or Activity Report.
- **Chapter Membership:** Overall chapter membership may have declined.
- **Chapter Meetings:** Chapter has held no meetings in the last calendar year.
- **Engagement with Nationally Provided Programs:** Chapter is not engaging with any nationally provided programs.
- **Engagement Initiatives for SHM Constituents:** Chapter has not implemented any engagement initiatives.
- **Membership Recruitment and Retention:** Chapter has not conducted any recruitment or retention initiatives.

Health Status Matrix

Health	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 Quarterly District Calls, Annual Conference, Webinars
Blue	Chapter health was Blue or Green status the year prior.	3+	Robust leadership structure with defined roles, terms, and succession plan written (preferably in the bylaws template).	Attends all training opportunities provided by SHM.
Green	Chapter health was Blue, Green, Yellow, or Orange status the year prior.	2+	Minimum of three active leaders with defined roles, terms, and a succession plan.	At minimum, the chapter attended all quarterly district calls. Chapter may have also attended training at the annual conference or a webinar opportunity.
Yellow	Chapter health was Blue, Green, Yellow, or Orange status the year prior.	1+	Minimum of three active leaders, but they may not have defined roles, terms, and a succession plan.	Chapter is attending some quarterly district calls and/or other training opportunities.
Orange/ Provisional (Struggling Chapters)	Chapter health was Blue, Green, Yellow, or Orange status the year prior.	1+	Chapter has one to two active leaders.	Chapter could or could not be attending quarterly district calls and other training opportunities.
Red (Sunset)	Chapter health was Orange the year prior. Chapter will be sunsetted and must re-apply for provisional chapter status.	0+	Chapter has no active leaders or leaders are unresponsive to communications.	Chapter is not attending all district calls or training opportunities.
Purple/ Provisional (New Chapters)	Chapter did not have a health status as it was not yet formed.	0+	Minimum of two active leaders. Chapter needs three active leaders with defined roles and terms to reach full chapter status.	Chapter attended all quarterly district calls after provisional recognition was received.

Health	Admin Meeting Notification Forms, Meeting Report Forms, Attendance/Check-In	Goals and Meeting Plan Document and Activity Report Submitted to SHM National Office annually in template provided to chapters, strategic planning meetings conducted by chapter leadership.	Chapter Membership SHM dues-paying members living in chapter's geography.	Chapter Meetings Educational meetings over dinner, networking-only, webinar/telecast, full- or multi-day conferences.
Blue	Chapter submitted all meeting notification forms and meeting reports in a timely manner. Attendance has been collected via Eventzilla/Zoom.	Leadership meets regularly to discuss goals and meeting plans for chapter's longevity. Chapter submitted the Goals and Meeting Plan Document and the Activity Report on time to SHM staff.	Overall chapter membership has increased in the past year.	Chapter holds four or more meetings in calendar year, or chapter holds one multi-day conference and two additional meetings.
Green	Chapter submitted all meeting notification forms and meeting reports in a timely manner. Attendance has been collected via Eventzilla/Zoom.	Leadership meets at least once a year to discuss chapter annual goals and meeting plans. Chapter submitted the Annual Goals and Meeting Plan Document and the Activity Report on time to SHM staff.	Overall chapter membership was sustained in the past year.	Chapter holds two to three meetings per calendar year, or chapter holds one multi-day conference and one additional meeting.
Yellow	Chapter has not submitted all meeting notification forms and meeting reports in a timely manner and/or attendance has not been collected via Eventzilla/Zoom.	Chapter has submitted the annual Goals and Meeting Plan Document and the Activity Report. It may have been late, or not thoroughly completed.	Overall chapter membership may have declined in the past year.	Chapter holds two to three meetings per calendar year, or chapter holds one multi-day conference and one additional meeting.
Orange/ Provisional (Struggling Chapters)	Chapter may or may not be submitting required meeting forms.	Chapter has submitted the Goals and Meeting Plan Document and the Activity Report. It may have been late, or not thoroughly completed.	Overall chapter membership may have declined.	Chapter held one or no meetings last calendar year.
Red (Sunset)	Chapter is not submitting meeting forms (or is not holding meetings at all).	Chapter has not submitted the Goals and Meeting Plan Document or Activity Report.	Overall chapter membership may have declined.	Chapter has held no meetings in the last calendar year.
Purple/ Provisional (New Chapters)	Chapter is working with staff to learn the meeting notification/report system.	Chapter is not required to submit the Goals and Meeting Plan Document the year they receive provisional recognition from SHM as this information should be detailed on the application. The chapter is only required to submit the Activity Report if provisional recognition was received before September of the current year.	Overall chapter membership numbers are shared with leadership. Leadership should begin discussing ways to increase membership.	Chapter held one or no meetings last calendar year.

Health	Engagement with Nationally Provided Programs Applied for Excellence Awards, Initiative/Start-up Funds, CME (through SHM), Chapter Challenge, Chapter Exhibitor Packages, HMX, supported SHM Fellows Program, Nominated Members for SHM Awards of Excellence	Engagement Initiatives for SHM Constituents Held 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. Mentorship programs, job fairs, scholarships, local award programs, and other similar engagement initiatives are included 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 membership are discussed, and other membership-focused initiatives.
Blue	Chapter has engaged with at least four nationally provided programs.	Chapter has conducted at least two engagement initiatives for SHM constituents.	Chapter has completed at least one recruitment and one retention initiative.
Green	Chapter has engaged with at least two nationally provided programs.	Chapter has conducted at least one engagement initiative for SHM constituents.	Chapter has completed at least one recruitment or one retention initiative.
Yellow	Chapter has engaged with at least one nationally provided program.	Chapter may or may not have implemented an initiative to engage SHM constituents.	Chapter may or may not have conducted recruitment or retention initiatives.
Orange/ Provisional (Struggling Chapters)	Chapter may or may not be engaging with any nationally provided programs.	Chapter may or may not have implemented an initiative to engage SHM constituents.	Chapter may or may not have conducted recruitment or retention initiatives.
Red (Sunset)	Chapter is not engaging with any nationally provided programs.	Chapter has not implemented any engagement initiatives.	Chapter has not conducted any recruitment or retention initiatives.
Purple/ Provisional (New Chapters)	Chapter is learning about nationally provided programs and may or may not have begun to engage.	Chapter may or may not have implemented an initiative to engage SHM constituents.	Chapter may or may not have conducted recruitment or retention initiatives.



Membership

One of the roles of SHM chapters is to recruit, retain, and engage members. This section provides membership, marketing, and communication strategies to build and strengthen your chapter.

Chapter Membership

All members of the Society of Hospital Medicine are assigned to a chapter based on their primary address ZIP code within their membership profile. All members pay membership dues to SHM National. No separate dues are required for SHM chapter membership. SHM membership types include:

Physicians: practicing hospitalist physicians, including those focused on research and/or education.

NPs and PAs: hospital medicine nurse practitioners and physician assistants.

Practice administrators: hospital medicine administrators and managers.

Allied health professionals: registered nurses, hospital pharmacists, and other practitioners working in hospital medicine.

Affiliates: practitioners working in hospital medicine including healthcare policy analysts, medical librarians, etc.

Residents and fellows: PG1, PG2, PG3 residents or fellows interested in learning more about a career in hospital medicine.

Students: students actively enrolled in accredited programs including MD, DO, NP, and PA programs. Medical students may join SHM free of charge.

Chapter Roster and Information about Members

Chapter Leaders can access member lists through the Chapter Leader Portal found in the My Account page on SHM's website. The information provided should be used to help grow your chapter, sustain current memberships and drive engagement among your peers. Real time reports can be accessed featuring different segments of information for members in your chapter's geography. Additionally, resources are included throughout to assist you in your outreach efforts. Leverage the data and resources provided within this portal to make connections and emphasize the value of belonging to SHM and your local chapter. View [Appendix XV](#) for more information regarding access to the Chapter Leader Portal and an overview of the reports available.

Remember, members can join and renew their SHM membership at any moment in time and therefore it is important to reference the data in real time prior to conducting your outreach.

Utilization of the Chapter Leader Portal will contribute towards annual Chapter Health Status. For example, chapters can utilize the data and resources found within the portal to outreach initiatives to support member engagement, recruitment, and retention.

Chapter Leaders can also access a member list through their Chapter Community in the Hospital Medicine Exchange (HMX). All individuals within the membership database, within your geographical region, will be automatically subscribed to your chapter's community. Chapter Leaders can communicate directly with

members through the private message or group message feature in the HMX platform. Non-members of SHM will receive limited access to the community (i.e., they will be able to view upcoming meeting information but cannot communicate with members until they join).

Membership lists should be utilized solely for SHM business-related purposes, including membership engagement, recruitment, and retention initiatives. The sharing of membership lists and/or contact information outside of those designated as Chapter Leaders is strictly prohibited.

Please remember that members join and renew by the minute and expire by the month, therefore this list should not be utilized to send out any membership blasts as it becomes quickly outdated. Emails such as chapter meeting invitations, election information, and e-newsletters will be sent out in an SHM branded template by the National Office to an updated list of members in your chapter.

The SHM National Office tracks both member and non-member attendance at every chapter meeting in the membership database. This allows for SHM staff to reconcile each chapter meeting, track member engagement associated with the chapter program, and identify potential new members. **Therefore, all event registrations must be collected online through Eventzilla for in-person events and through Zoom for virtual events.** Collecting in-person event registration through Eventzilla will ensure that all attendees have agreed to the SHM *Be Well Agreement*.

While pre-registration is required to attend all events, SHM understands that individuals may walk in who are not pre-registered. Those individuals will need to register via the Eventzilla online registration link while onsite to ensure consistency of requirements for all attendees at the event.

SHM staff recommends that Chapter Leaders print the meeting flyer with the QR code that links to the event registration page. Onsite walk-ins can then scan the

QR code with their personal device and access the registration page to finalize their registration.

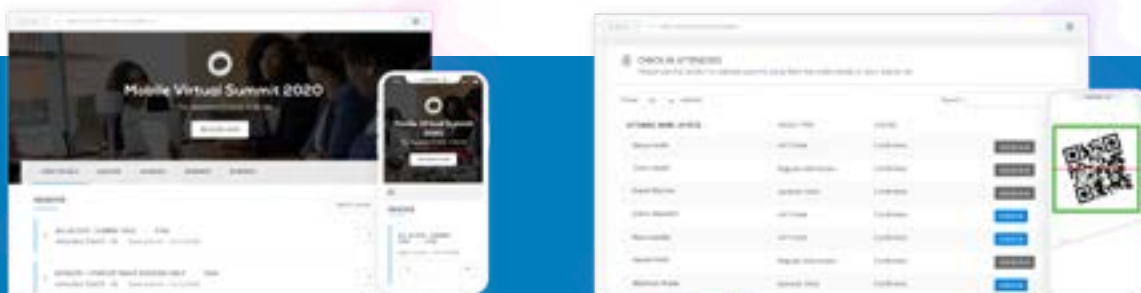
Chapter Leaders are required to collect and send all chapter meeting attendee information to the SHM National Office through the Eventzilla web platform or app to accommodate a touchless sign-in process. Utilizing Eventzilla for the attendee check-in process will also lessen the burden for Chapter Leaders to scan sign-in sheets and send them to the SHM staff. Additionally, any follow-up emails to attendees, such as information regarding claiming CME, can be expedited.

- SHM staff will provide Chapter Leaders with login information to access their meeting registrations and onsite check-in.
- SHM staff will provide training to Chapter Leaders on the process for login and use of the Eventzilla web platform and/or app to access meeting registrations and the onsite check-in process. Please log in to Eventzilla before your event date and notify SHM staff if you need support.
- It is recommended that Chapter Leaders print the registration list to utilize as a sign-in sheet in case of onsite technical issues.

Registration for hybrid events will be collected through Eventzilla.

- In the event registration form, registrants will be able to select whether they are attending the event in-person or virtually.
- The Zoom Meeting information for your event will be included in the confirmation email sent to registrants.
- Chapter Leaders are only responsible for checking in attendees onsite through the Eventzilla web platform or app. Zoom will automatically track those who join the meeting virtually.

Eventzilla Organizer app



Membership Join and Renewal Payments and Access to Benefits

All membership joins and renewals must be processed by the SHM National Office. This may be completed electronically via the [SHM online application](#) for joins or the online renewal process in one's membership dashboard found at www.hospitalmedicine.org for renewals or by mail or fax via a printed application or renewal invoice. Chapters are not allowed to store or process payments.

The SHM National Office offers a 10% discount to any new member recruited through a chapter.

In order to receive the discount, new members must submit the current Chapter Membership Form or contact a staff member for an online discount code. NOTE: Dues rates are evaluated and subject to change on an annual basis. Chapters must use the current fiscal year's form (October 1 - September 30) to ensure correct dues rates are being used. Visit the [Membership page](#) for the current dues rates by member type.

New members will receive an email receipt within 24 hours of the processing of their membership application. Access to member benefits will be received via a welcome email that includes their new member kit.

All SHM memberships renew annually on the anniversary of the member's join date. Membership renewal invoices and reminders are sent via email and physical mail to ensure membership dues are paid by members in a timely manner so as not to disrupt their member benefits.

Chapter Leaders are encouraged to call or email newly joined SHM members to welcome them to the organization and invite them to an upcoming chapter event. Similarly, Chapter Leaders should reach out to members who are up for renewal to remind them of the value of SHM membership and similarly invite them to attend an upcoming chapter event.

Membership Drives

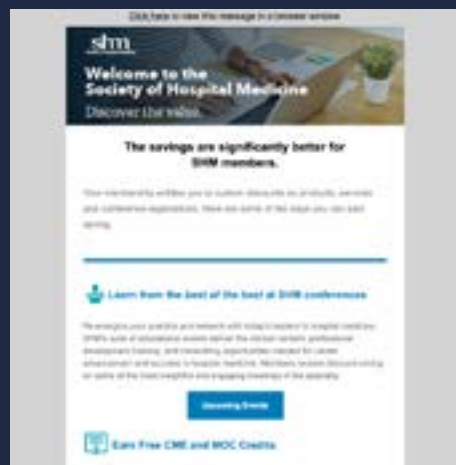
Chapter Leaders are the front line of SHM and help to connect members with the organization at a local and personal level. There are many things chapters can do to introduce prospective members to SHM. Chapters may want to try some of the following ideas:

At chapter meetings:

- Utilize the SHM Member Benefit PowerPoint slides, available in the Chapter Leader Portal on SHM's website. Present the benefits of membership to the attendees or have the slides on loop throughout the networking part of the event;
- Walk attendees through the process of joining SHM at the start of the meeting;
- Have a membership table at every meeting to display applications and SHM promotional flyers;
- Discuss SHM membership in 1:1 conversations during the networking hour of the event and invite non-members to join.

Use your chapter's activity funds to:

- Help offset the cost of membership (run a promotion that discounts membership by having the chapter cover a portion of the dues);
- Print flyers to hang in your hospital and distribute to colleagues;
- Hold a raffle to give away a free or discounted membership;
- Purchase branded giveaways for usage at chapter events or as thank you gifts when new members join at a chapter meeting;
- Host recruitment events, such as a career event for residents and students, and provide discounted memberships for attendees;
- Schedule 1:1 meetings at local hospitals to talk about chapter activities and the benefits of joining SHM.



Let the SHM National Office Help You

- Provide a list of hospitalists within local institutions, and SHM will invite them to join and participate at your chapter meetings.
- Want to do outreach on your own? Utilize the reports available in the Chapter Leader Portal to customize your outreach efforts.
- Initiate a call campaign. Sometimes a personal phone call can go a long way.
- Are you seeing outdated information on a prospective member list and have updated information to share? Provide that data to SHM staff so we can update it in the Membership Database. This will ensure prospective members will receive future promotions and announcements from SHM.

Member Retention Strategies

- Establish opportunities for members to get involved. Leadership positions are a great way to build involvement in the organization at the local chapter level.
- Hold frequent meetings at locations convenient to members. If you represent a large geographical area, consider rotating the locations at which your meetings take place.
- Solicit feedback on topics, speakers, and types of events that are of interest to members, from the chapter members.
- Distribute a chapter newsletter to keep members up to date on what is happening in your chapter.
- Start discussions in your online Hospital Medicine Exchange (HMX) Chapter Community to get members talking and networking virtually.
- Provide updates/summaries of your chapter meetings in your online Hospital Medicine Exchange (HMX) Chapter Community.
- Conduct local Hospitalist Awards (see [Appendix VII](#) for details).

- Nominate members for SHM National Awards of Excellence.
- Make chapter members aware of the SHM Fellow and Senior Fellow designations.
- Endorse members for SHM's Fellow designation

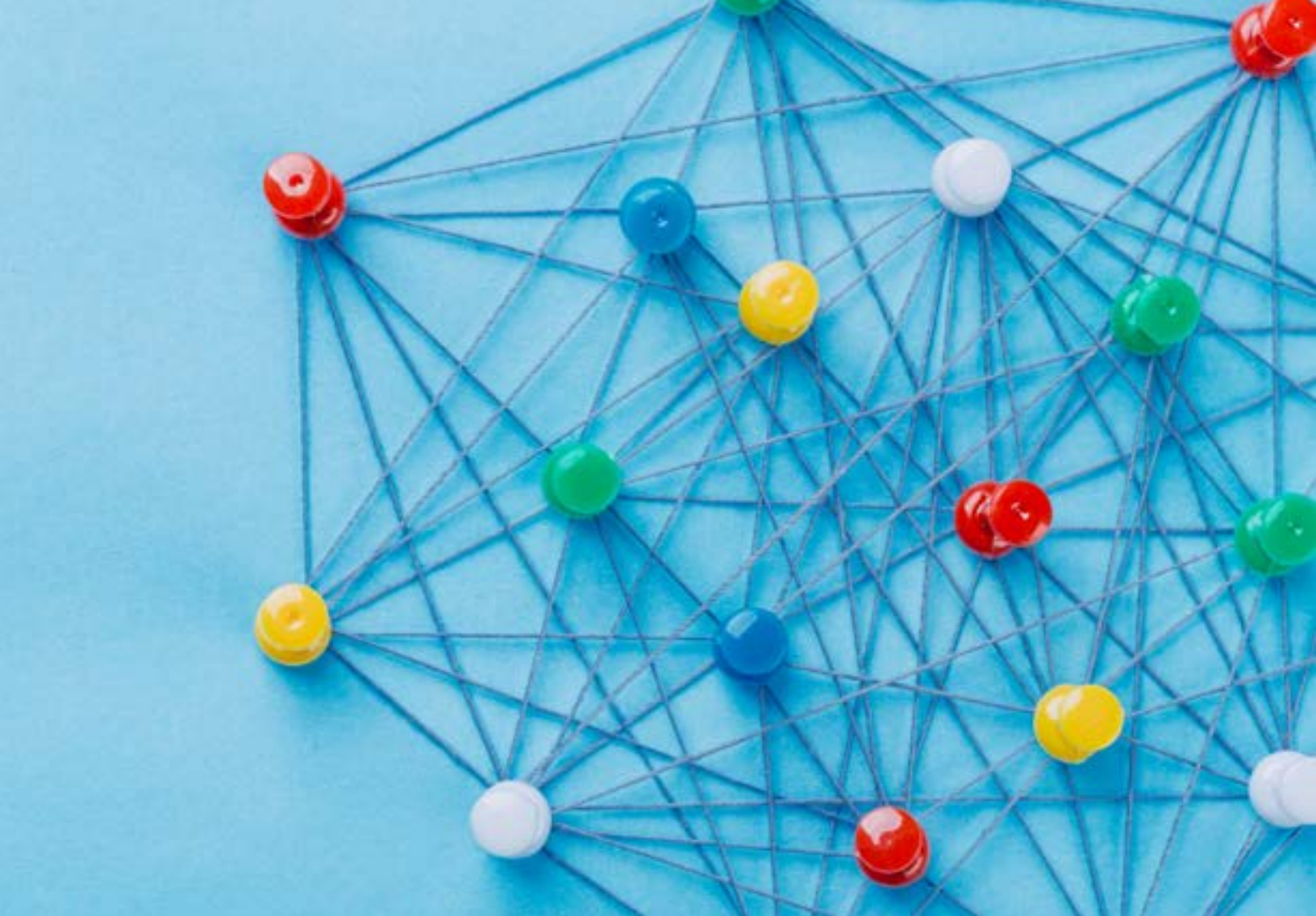
Chapter Incentives

SHM awards chapters for recruiting new members through the Chapter Health and Chapter Excellence Awards:

- **Chapter Health categories that encourage membership growth:** overall measure of total chapter membership growth, membership engagement initiatives, and membership recruitment and retention initiatives.
- **Chapter Excellence Awards pertinent to membership growth:** Chapters are rewarded for the initiatives they've conducted within the past calendar year to recruit, retain, and engage members for Status Awards. Chapters can also apply for the Most Outstanding Membership Retention and Recruitment Initiative Award.

Chapter Challenges: Occasionally, the Chapter Support Committee will challenge chapters to a competition in which they compete against other chapters to recruit prospective members to join SHM and retain current members up for renewal. Winners of the challenge receive prizes determined by the committee and the SHM National Office.





Encouraging Members to Get Involved Nationally

One of the primary roles of a Chapter Leader is to make connections between your local chapter and SHM National. This includes encouraging non-members to [join](#) and motivating current members to [get more involved](#). Additionally, you can connect members with the application process to serve on an [SHM committee](#), inform them of the ways to get involved in an interest group, encourage them to be active on social media and on SHM's online community, the [Hospital Medicine Exchange \(HMX\)](#), or discuss the pathway to ultimately serve in a national leadership role.

As a Chapter Leader, promote these opportunities to members, especially those who demonstrate an interest in becoming more involved. This is a win-win for both the individual member and the chapter. As these members grow within the organization, the chapter will garner increased visibility at the national level.

Establishing Relationships with Local Hospital Medicine Groups

As a leader in hospital medicine, Chapter Leaders can help foster a relationship with hospital medicine groups in the chapter's geographical area by:

- Sharing information about [upcoming chapter meetings](#) and inviting them to attend;
- Hosting a lunch to discuss SHM membership, the chapter's goals, upcoming meetings and education, and how the hospital medicine group can get involved;
- Inviting a hospitalist from every local group to sit on the chapter's leadership.



Marketing and Communications

An important component in member engagement is regular and reliable communication. SHM chapters not only provide the opportunity for hospitalists to network, learn, and experience SHM on a local level but also act as a vehicle for member growth and retention. Regular communication with members keeps SHM at the forefront and helps members understand that they are a part of a vital, dynamic organization.

Chapters should utilize bulletin boards at local hospitals, newsletters, in-person meetings, email, and their online Chapter Community (HMX) to share local and national news and initiatives. Marketing and communication efforts play a large role in the overall chapter meeting experience, and the SHM National Office will provide assistance with these efforts. To ensure that members and non-members are receiving high-quality content from the local chapter community consistent with the SHM National brand and voice, Chapter Leaders must follow the guidelines and procedures outlined below with respect to:

- Logo and brand guidelines
- Chapter web presence
- Email opportunities
- Marketing options for Chapter Leaders
- Social media

Logo and Brand Guidelines

SHM provides each chapter with a unique logo consistent with SHM's national brand. This logo may not be altered in any way and may not be distributed in print, online, or on promotional items without approval by SHM staff. For brand consistency, Chapter Leaders must utilize the SHM design team for all flyers, brochures, and other marketing materials. Marketing materials must meet the SHM brand guidelines and professional standards to prevent brand dilution and ensure a consistent organizational voice. Procedures for requesting marketing and promotional materials are found on page 27.

Logo Examples





Chapter Web Presence

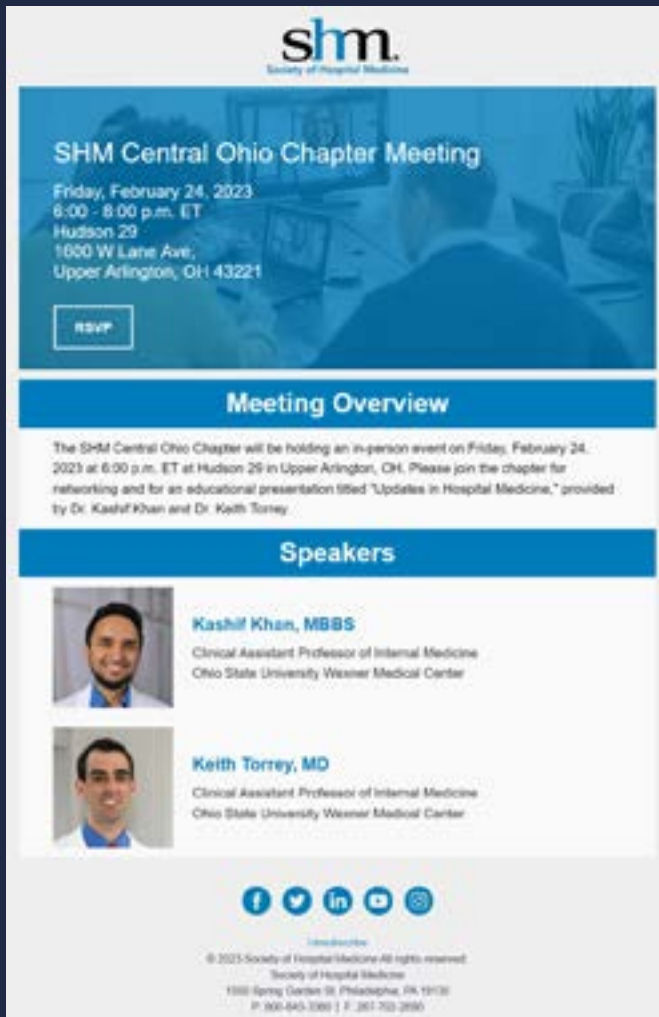
Chapters are prohibited from creating individual websites. In order to maintain consistency with the SHM brand, it is important for each chapter's web presence to be consistent and up to date. A chapter's landing page is created in the Hospital Medicine Exchange (HMX) upon inauguration and follows a unified template. SHM staff will assist Chapter Leaders with maintaining relevant content on each chapter page. Please see "[Managing Relationships](#)" on page 40 for a how-to on navigating HMX for Chapter Community page updates and Chapter Leader forms.

Updates to Submit to SHM Staff

- **Updated Chapter Leader Information:** SHM staff will add and remove leaders upon receipt of election results in the spring and provide new leaders administrative access to the HMX Chapter Community.
- **Governance Information:** Bylaws and Call for Nomination documents should be sent to SHM staff, as well as posted in the HMX Chapter Community. Chapter Leaders are welcome to share the documents in the community through the Discussion feature.
- **Chapter Events:** The Meeting Notification Form is located on the Chapter Leader's Dashboard in the [Hospital Medicine Exchange \(HMX\)](#). Upon receipt, SHM staff will create the chapter event in the chapter's own HMX community. This event will also be visible on the Master Calendar within the Hospital Medicine Exchange (HMX). After the chapter's event takes place, Chapter Leaders should report back on the meeting by submitting a discussion post in the chapter's community within HMX.
- **Newsletters:** SHM staff will design chapter newsletters upon request. The newsletter will be added to the downloadable files in the chapter's HMX community and also emailed out to chapter members. Leaders may also attach newsletters to discussion threads.

Updates That Chapter Leaders Can Make as Chapter Community Administrators

- **Chapter Meeting Notifications:** Accessible from the Chapter Leader's Dashboard in HMX.
- **Chapter Meeting Updates for Webpage:** Leaders should post updates about their meetings through the Discussion feature in the Chapter Community page.
- **Updates on What is Happening in the Local Hospitalist Community:** Start conversations with SHM members of the chapter on HMX.
- **Photos:** Add photos of your chapter meetings and events to the Chapter Community page.
- **Member List:** Chapter Leaders have access to a list of SHM members within the chapter's geographic area, through the Chapter Community.
- **Invitations:** Invite members and non-members to join the online Chapter Community through the Invite feature. Non-members will be limited to what they can view until they join SHM. Chapter Leaders can use this as a tool to invite non-members to join and to share information about upcoming meetings.
- **See [Appendix VIII](#) to see best practices for utilization of HMX and to better understand how to submit meeting notification forms.**



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Society of Hospital Medicine

SHM Central Ohio Chapter Meeting
Friday, February 24, 2023
6:00 - 8:00 p.m. ET
Hudson 29
1000 W Lane Ave,
Upper Arlington, OH 43221

RSVP

Meeting Overview

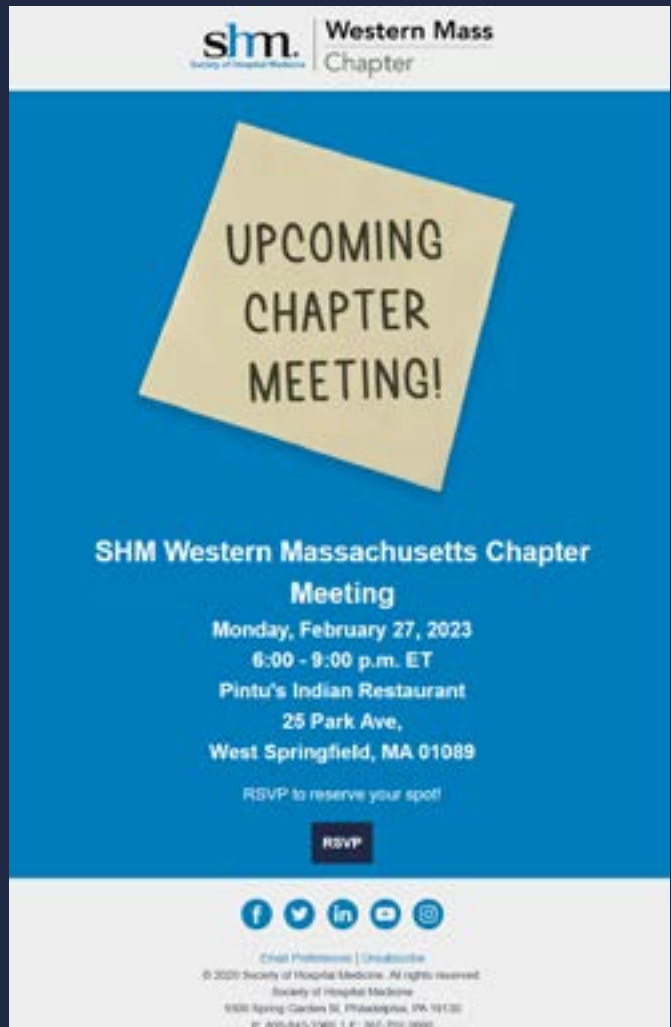
The SHM Central Ohio Chapter will be holding an in-person event on Friday, February 24, 2023 at 6:00 p.m. ET at Hudson 29 in Upper Arlington, OH. Please join the chapter for networking and for an educational presentation titled "Updates in Hospital Medicine," provided by Dr. Kashif Khan and Dr. Keith Torrey.

Speakers

Kashif Khan, MBBS
Clinical Assistant Professor of Internal Medicine
Ohio State University Wexner Medical Center

Keith Torrey, MD
Clinical Assistant Professor of Internal Medicine
Ohio State University Wexner Medical Center

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Society of Hospital Medicine
1930 Spring Garden St, Philadelphia, PA 19130
P: 800-845-5360 | F: 267-752-2890



sh.m. Western Mass Chapter
Society of Hospital Medicine

UPCOMING CHAPTER MEETING!

SHM Western Massachusetts Chapter Meeting
Monday, February 27, 2023
6:00 - 9:00 p.m. ET
Pintu's Indian Restaurant
25 Park Ave,
West Springfield, MA 01089

RSVP to reserve your spot!

RSVP

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Email Opportunities

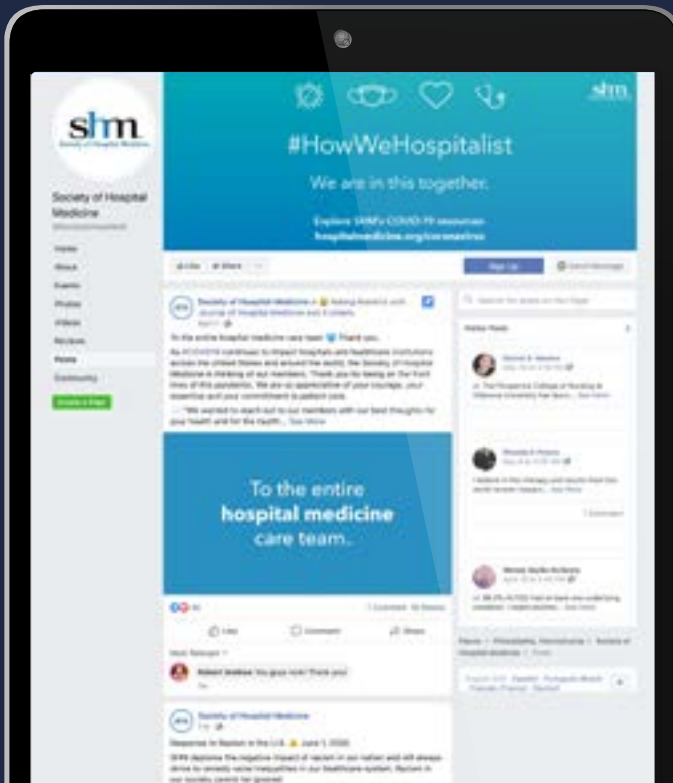
Meeting Invitations

Prior to each chapter meeting, SHM will deploy a series of email invitations to both members and engaged prospects living within the chapter's designated geography. Emails will only be sent to members for member-only events. Invitations deploy on Saturday mornings at 10:00 a.m. in the recipient's time zone. Invitations for all chapters follow the same template. It should also be noted that SHM often refreshes the template to maintain and increase open and click-through rates for chapter outreach.

Other Emails

Chapters may choose to send out other chapter-related information via email. Examples include:

- **Chapter election information:** Chapters are encouraged to share chapter election results and voting information via email. SHM will advertise annual chapter elections information to all active, dues-paying members on behalf of the chapters.
- **E-newsletters:** E-newsletters may be distributed to chapter members through the chapter e-mail template and will also be posted on the chapter's HMX community for members to access.



@SocietyHospMed

Social Media

SHM uses social media to distribute content and drive engagement to support its organizational goals, the role of hospitalists in healthcare, and to promote exceptional care for hospitalized patients. Social media is a core function of SHM's Marketing Communications Department, which serves as SHM's resource center for all social media interactions. SHM encourages the creative and responsible use of social media by staff, leaders, members, and others to further engage our membership base and beyond. To refrain from sharing competitive content to SHM's membership, avoid conflicts of interest, and ensure that all social media channels associated with SHM share the same goals, Chapter Leaders must adhere to the guidelines below.

- SHM Chapter Leaders may not create chapter-specific social media profiles. Social media profiles include personal blogs, microblogs (Tumblr, Twitter), podcasts, online collaborative forums and message boards, streaming and online video, websites, social networking sites (Facebook, Instagram), professional networking sites (LinkedIn), media repositories (YouTube, Flickr), and crowdsourced sites (Wikipedia).
- Chapter Leaders may choose to utilize their funds to sponsor Facebook ads (advertisements) from SHM's Facebook page, targeted specifically to their chapter geography, to promote upcoming chapter events, via the Chapter Meeting Notification Form.

The suggested spend for sponsored Facebook ads is a minimum of \$50 and a maximum of \$200. The sponsored Facebook ads should run from four to six weeks. Content suggestions are encouraged, but final content for sponsored ads is left to the discretion of the Marketing Communications Department. To sponsor a Facebook ad promoting an upcoming chapter event, submit the dollar amount to be applied toward the sponsored ad when filling out the Chapter Meeting Notification Form.

- Chapter Leaders and constituents may tag @SocietyHospMed on [Twitter](#) and [Instagram](#) and/or Society of Hospital Medicine on [Facebook](#) or [LinkedIn](#) for the opportunity to have their posts shared or retweeted. The decision to share or retweet to SHM's followers is left to the discretion of the Marketing Communications Department.

SHM chapters now have their own unique chapter hashtag to continue the conversation online and share photos and/or news from chapter events. Please see [Appendix IX](#) for a listing of each chapter's hashtag.

Marketing Options for Chapter Leaders

Promotional Items for Purchase

Chapter Leaders have the option to place an order for various marketing and promotional items, following SHM staff approval. All costs associated with the promotional material order will come from the chapter's activity funds. To place an order for promotional items:

- Contact SHM staff to request the purchase of promotional materials branded with the chapter's logo.
- SHM staff will process the request, determine whether the chapter has sufficient chapter activity funds, and if so, staff will notify the Chapter Leaders of the request's status.

Chapter Event Flyers

- On the Meeting Notification Form, Chapter Leaders may choose to have an event flyer created.
- Upon submission, a notification will be sent to SHM staff to begin creating the flyer.*
- Chapter Leaders will receive a digital copy of the finished event flyer to print and distribute on their own. If Chapter Leaders would like event flyers printed professionally and shipped directly to the chapter, staff will confirm the total cost of printing and shipping with the Chapter Leader prior to sending the flyer to press.

E-newsletters

Email the content you would like included in the newsletter, including the text in a Word document and photos (ideally high-resolution) to the SHM staff.

- Upon receipt, SHM staff will begin creating the e-newsletter and follow up with any questions.*
- Chapter e-newsletters will be distributed within chapter meeting email invitations and will be uploaded to the chapter's community in the Hospital Medicine Exchange (HMX).

SHM Collateral

SHM staff will mail collateral to Chapter Leaders occasionally as new meetings, programs, and member benefits are established. Chapter Leaders should contact an SHM staff member if additional collateral is needed. SHM staff will provide a PDF to print or distribute digitally.

*Chapter Leaders should expect a two-week maximum turnaround time.

Notes on Chapter Marketing Collateral

All collateral (print and digital) will be sent to Chapter Leaders to review and edit before final approval; these edits should not include changes to content. Requests for marketing collateral should not be submitted before content is final. Submitted content may be edited by SHM staff. Chapter Leaders should allow at least two weeks to receive a final product. Timing may vary during busy periods throughout the year.

SHM Marketing at Chapter Meetings

Chapters have the unique ability to bring information about SHM's products and services to the attention of members and non-members through:

- PowerPoint slides with SHM branding and information to be displayed at the meeting (available in the Chapter Leader Portal).
- Digital copies of flyers to be printed by Chapter Leaders.
- Corresponding contact information for products and services. In some cases, there will be discounts on products associated with attending a chapter meeting. It is requested that the Chapter Leader ensure that all materials are displayed or distributed at the meeting and that any inquiries about programs or products are directed to the appropriate SHM staff member.

The collage features three main pieces of marketing collateral:

- eNEWSLETTER:** A publication of the Kentucky Chapter of the Society of Hospital Medicine. It includes sections for 'UPCOMING EVENTS', 'CHAPTER UPDATES', and 'Member Spotlight'. The 'UPCOMING EVENTS' section mentions a dinner at Giuseppe's in Lexington. The 'CHAPTER UPDATES' section discusses the Heartland Hospital Medicine Conference and the Kentucky Chapter of SHM's role in the EAM (Electronic Assessment Module) system and DRG reversal streams. The 'Member Spotlight' features Shela Lambirth, MD, at St. Clare HealthCare in Morehead, Kentucky.
- SHM Rocky Mountain Chapter Meeting - Updates in Hospital Medicine:** A flyer for a meeting on Tuesday, February 21, 2023, from 6:00 - 8:00 p.m. MT at the Denver Aquarium, 700 Water St., Denver, CO 80202. It lists speakers Arven Bakdashy, MD, and Samuel Parker, MD. A QR code is provided for scanning.
- New Members:** A section welcoming new members to the Kentucky Chapter, listing Josiah Burrows, Carla Caton, RN, Jon Craft, and Talita D'Aguiar Rosa, MD.



Chapter Organization and Leadership

Every chapter needs a solid foundation upon which it can grow and develop into a strong SHM chapter. This section provides suggestions on effective chapter leadership management strategies.

Developing Chapter Bylaws

Chapter bylaws provide direction, leadership and cohesiveness to help achieve chapter goals. If a chapter wishes to adopt bylaws, which is recommended, it should utilize the template located in [Appendix X](#). The highlighted fields within the template suggest procedures based on the operations of SHM's most successful chapters.

Establishing Your Local Leadership Team

Whether chapter leadership is in the first stages of structuring the chapter or is simply looking for new ideas to revitalize the chapter's leadership team, a sound structure can ensure the chapter will meet its goals while giving more members an opportunity to get involved. The chapter should continually strive for a leadership structure that enables it to carry out its business in an efficient manner while providing leadership continuity.

The leadership positions in [Appendix X](#) are in place at many of SHM's most successful chapters. This helps to get new members involved early and spreads out the work of the chapter to ensure that no one person is doing everything related to chapter leadership. Attendance at national meetings is of key importance, as these meetings provide training on chapter management and SHM's structure.

Chapter Leadership Position Requirements

Although each leadership position within a chapter is different, all Chapter Leaders must meet the following requirements:

1. Must be a current dues-paying member of SHM throughout the term of office;
2. Must have a primary address, either home or work, located within the geography of the chapter;
3. Must demonstrate dedication to SHM goals and objectives and be willing to effectively execute the duties and responsibilities of the position;
4. Must be able to attend all required meetings (determined by the chapter).

Selection of Officers

Officer Election Procedures

Chapter bylaws define election procedures and ensure that there is leadership continuity from year to year.

Timing: The timing for all chapters' election procedures must align with that of the SHM National Board. This creates continuity across all chapters and enables staff to assist with each chapter's process.

September - November: Call for Nominations
December - February: Elections
February - March: Notification
March - May: Officers take office (aligns with the SHM Annual Conference)

Call for Nominations: Every dues-paying member in the chapter should be given the opportunity to nominate themselves or others for a chapter leadership position. The SHM National Office will collect nominations through an online form and share the nominated individuals' information with the current Chapter Leaders upon closure of the nomination period. Information requested on the nomination form should include the candidate's current SHM membership status, an open-ended response field for the nominator to describe why the candidate is a good fit for the leadership role, and the candidate's CV. SHM staff will contact all chapters' current leadership in the summer prior to the call for nominations. Staff will confirm the chapter's

leadership positions that will be open for nomination, including the job descriptions and terms of office. Nominations will then be collected in the fall as outlined above.

Chapter Leader Terms of Office: Chapters must establish terms of office for each Chapter Leader position and include them in the chapter's bylaws. When establishing leadership positions, chapters must define whether those positions' terms may be renewable. **The following terms are recommended but not required:**

<p>Past President ▲ President ▲ Vice President</p>	3-year term total (1 year in each position)
Secretary	3-year renewable term
Treasurer	
Directors/ Advisory Board	1-year renewable term

Election Procedures: Dues-paying members of SHM, located within your chapter's geographically defined boundaries, can vote in the chapter's Chapter Leader election. All members must be given the opportunity to vote either in person at a chapter meeting (announcement of the election will be made prior to the meeting) or electronically via an online survey link that is emailed to all chapter members. The SHM National Office will send out announcements to all chapter members via email.

Chapter election procedures must be included in the chapter bylaws. The bylaws should also include removal procedures to address non-performing leaders from office and filling those vacancies.

Chapter Leader Job Descriptions: After the chapter's structure has been determined, formal descriptions of each position should be written. Position descriptions will lessen confusion, ensure all duties are completed as defined, and establish accountability. Refer to sample position descriptions in [Appendix X](#). Position descriptions should be reviewed and shared each time there is an election.

Setting Chapter Goals

Each year the chapter leadership team should define both chapter and leadership position-specific goals. Goals are submitted every year to SHM staff and shared with the chapter's District Chair. Chapters should monitor their goals throughout the year and report on successes or struggles during quarterly district meetings and in the end of year (calendar) Activity Report. Both staff and District Chairs will assist chapters throughout the year to ensure that they are on track to meet their annual goals.

All goals must be measurable. For example, do not write a goal that states, "Increase membership this year." A well-written goal will define the increase that the chapter is working toward. A well-written goal would read, "Increase membership by 20 percent or by 40 new members this year." By making the goal measurable, it enables the chapter to better determine its success.

Planning Leadership Meetings

The chapter bylaws should specify the frequency of chapter business meetings. Meetings can take place in-person or via teleconference and should be used to plan upcoming meetings, report on previous chapter activities, measure the progress of chapter goals, and communicate important national initiatives.

Leadership Training for New Chapter Leaders

Defining expectations of newly elected Chapter Leaders and training of those leaders should occur early in their tenure to ensure a smooth transition of leadership, enable the new leaders to carry out the work of the chapter, service the chapter membership, and empower them to work with the SHM National Office and its staff in a more timely manner. Training should begin following the notification of election results but before the time at which the new Chapter Leader takes office. Chapters should utilize this handbook as a training tool for their new leaders.

Personal training is much more effective than instructing new leaders just to read the handbook.

New leaders should also take advantage of the following opportunities:

- The SHM Chapter Leader Training Program that takes place at SHM's Annual Conference
- The SHM Chapter Leader Reception that takes place at SHM's Annual Conference
- The SHM Leadership Academy
- SHM Chapter Leader Training Webinars (scheduled at various times throughout the year)

Chapter Leaders can utilize activity funds to be reimbursed for expenses related to travel to SHM's Annual Conference or Leadership Academy once during their tenure. The entire chapter's leadership must approve of chapter funds being utilized to reimburse a leader's travel expenses for training/development purposes.





Finances

Adequate operating funds are essential in order for chapters to conduct various member activities and programs. To achieve this, there needs to be a working budget of all necessary expenses, balanced against the revenue earned through exhibitor display revenue and Chapter Initiative Funds. This section describes how to acquire funding and budget for meetings and provides guidelines for spending.

The SHM National Office will manage the board-designated funds to chapters and expenses incurred by the chapter, hereafter called chapter activity. Funds received and not utilized by the chapter will be available to the chapter for future chapter activities. All funding and expenses must be funneled through the SHM National Office.

Securing Exhibitors

Third-party organizations may participate at SHM chapter meetings by purchasing display space to introduce their products or services to local hospitalist attendees. Chapter Leaders understand that the SHM National Office does not have a contact list of company representatives and that they are responsible for sharing local representative contact information with the SHM National Office. An SHM staff member will contact the local representative to solicit their participation at the chapter meeting and provide an exhibitor contract. Exhibitors will sign and return the contract directly to an SHM staff member indicating that they agree to the stated compensation, terms, and conditions. Chapter Leaders understand the following information is required to be submitted in the Meeting Notification Form for exhibitor solicitation to take place: event date and time, venue name and address, meeting agenda including topic and speaker information.

All exhibitor revenue must be sent to the SHM National Office either by check or credit card and will be included in your chapter's balance of activities. Credit card payments are limited to a maximum of \$5,000. Payments of any higher denomination will need to be mailed to the SHM National Office via check.

Chapter Expenses

Pharmaceutical companies are strictly forbidden from directly paying for meals, providing speakers and/or honorariums, and providing educational content. Pharmaceutical money must be managed through the SHM National Office. Chapter expenses, such as those associated with chapter meetings, will be paid from the funds allocated to your chapter. Chapter Leaders should submit vendor invoices to the Society of Hospital Medicine for direct payment. If the vendor does not allow payment via check as an option or requires more timely deposits or payment, Chapter Leaders should make a request to SHM staff to provide credit card information to the vendor. The following information should be provided: invoice containing expense amount, date to be charged, reason for the charge, contact for payment. SHM will contact the vendor directly and provide payment for the expense.

Administrative Fees

Administrative fees are collected for all in-person chapter meetings and conferences to help offset the cost of resources that SHM provides to chapters to conduct these activities. Please refer to the Guidelines for chapter meetings and chapter conferences for additional information on resources provided and guidelines in place.

Chapter Meeting Administrative Fees (in-person)

- A flat fee of \$500 will be collected for all in-person events.
- This fee may be waived to support chapters with limited activity funds and difficulty securing sponsors.
- Chapters that wish to receive CME through SHM will be charged an additional \$500 fee (no change).

Chapter Conference Planning Administrative Fees (in-person and virtual)

- 10% of meeting revenue (registration and sponsorship).
- Additionally, a flat fee of \$500 will be collected.
- Chapters that wish to receive CME through SHM will be charged an additional \$500 fee (no change).

Financial Reporting

Board-designated funds are managed by the SHM National Office and are available to the chapters on a quarterly basis. Chapter Leaders may also request an update of their current activity at the time their meetings are being held. This ensures that all confirmed exhibitors have sent payment to the SHM National Office and that all expenses have been paid.

Tax-Exempt Status

The Society of Hospital Medicine is tax-exempt under section 501(c)(3) of the Internal Revenue Code. However, sales tax exemptions are granted by the states, and SHM is only exempt from sales tax in Pennsylvania, where the SHM National Office is located. Chapters should never assume they are exempt from paying sales tax as exemptions and requirements vary widely from state to state. **Please contact SHM staff to determine if tax exemption is possible in your state.**

Charitable Donations

All charitable donation requests should be sent to an SHM staff member for pre-approval. Donations are not reimbursable to Chapter Leaders.

Contracts with Venues/Vendors

Chapters typically select venues that are centrally located to members, have a private space for a speaker presentation with audiovisual capabilities, and have space to accommodate exhibitor tables. Meetings should be held at a modest venue that does not create an appearance of lavishness or extravagance as viewed in the eyes of the local community. When selecting your venue, be sure to ask what is included with the space.

Below are the recommended questions to ask your venue contact:

1. Is there a room rental fee?
2. How many people can the room accommodate?
3. Can exhibitor tables be placed inside/outside the room?
4. Is there a set-up cost for exhibitor display tables?
5. Is A/V included? If not, what is the fee for the screen, projector, mic, etc.?
6. What is the food and beverage minimum?
7. What food and beverage packages are available? Do they include alcohol?
8. Will service fees and/or gratuity be included?
9. Are there any other fees I should be aware of?
10. How many days before the event date do you need a final guest count?

It is likely that your venue will require an agreement, banquet event order (BEO), or invoice to be signed to reserve the space. **ALL agreements must be reviewed and signed by an SHM staff member prior to moving ahead with a venue.** Why? All chapters are components of SHM National, and SHM National is liable for all chapter activities.



Funding Guidelines

It's important for chapters to raise funds for chapter activities. Below are guidelines on what your chapter's funds can be used to fund:

- **Chapter Meeting Expenses:** Chapters should create a meeting budget that incorporates enough exhibitor and/or registration revenue to cover all meeting costs. Chapters funds can be utilized to cover costs if/when the meeting revenue falls short.
- **Chapter Leadership Planning Meetings:** Chapter Leaders are permitted to utilize activity funds towards a strategy or planning meeting up to 4 times per year (quarterly) with a maximum spend of \$100 per person.
- **Scholarships:** Many chapters provide scholarships for residents and students to attend the SHM Annual Conference.
- **Membership:** Entice non-members to join by using chapter funds to offset the cost of membership. Funds cannot be utilized to renew Chapter Leader membership dues.
- **Promotional Items:** Purchase SHM-branded items for your chapter through the SHM National Office.
- **Chapter Leadership Training:** Chapters that have acquired an activity balance of more than \$10,000 can utilize their funds for travel to attend SHM's Annual Conference OR SHM's Leadership Academy. Only one reimbursement is permitted per Chapter Leader throughout his or her tenure. Written approval from all chapter officers must be provided to staff.



Chapter Meeting Expense Guidelines

Food and Beverage

Most chapters choose to provide food and beverages at their educational events. Costs can vastly differ from chapter to chapter based on chapter location. SHM policy is to keep the targeted cost below \$125 per person. Chapters may choose to provide alcohol at their events but should be conservative when selecting a drink package. To align with other SHM events, à la carte alcohol offerings by chapters should be limited to not more than two drinks per person as well as beer and wine by the glass only. If the venue offers you a per person package, the policy is for the total package (including tax and gratuity) to not exceed \$125 per person for both food and beverage.

Non-Educational Events

Chapters may choose to hold non-educational events for members to network and increase engagement within the chapter. Non-members may be invited to attend these member experiences in an effort to recruit them to join. Non-educational events are events that feature networking and social activity without an educational component. Costs can vastly differ from chapter to chapter based on location. Policy is to keep the total target cost of the event below \$100 per person. This includes food and beverage (typically a drink and passed hors d'oeuvres) and activity associated costs. It is recommended that non-members are charged a nominal fee to attend to prevent no-shows and ensure they are interested in SHM.

SHM understands that costs can vastly differ from chapter to chapter based on chapter location. Meeting locations and food and beverage packages should be modest, not creating an appearance of lavishness or extravagance as viewed in the eyes of the local community.

Chapter Leaders are eligible to utilize activity funds for leadership planning meetings up to 4 times per year (quarterly) with a maximum spend of \$100 per person (aligning with the food and beverage guidelines for non-educational events).

Speaker Fees, Honoraria, and Gift Cards

For purposes of budgeting, be certain to discuss if you will provide speakers an honorarium as a gesture of thanks or if your speaker charges a fee prior to your meeting.

Professional speakers or those in high demand will often state a fee ahead of time, while many others simply accept invitations to speak as colleagues or mentors. Below are a few scenarios to assist in guiding the process as to whether a payment is necessary.

- A colleague or local member who is asked to speak at your meeting will most likely not expect an honorarium. Graciously hosting them and providing a meal during the meeting is usually sufficient. Chapter Leaders may consider giving a \$100-\$200 gift card as a modest gesture of appreciation. SHM staff will purchase the gift card on Amazon and send it via email directly to the speaker. A W-9 form and speaker agreement are not required from the speaker in this instance.
- Bringing an academic speaker who is well-published and has prestige in his or her specialty may warrant a slightly higher honorarium. You may offer up to \$500 or ask if they have a standard fee. In these cases, the speaker must sign an agreement and provide a W-9 form to SHM staff. Payment will be mailed directly to the speaker via check.

Some speakers may request, or the chapter may wish to offer payment of travel-related expenses to and from the meeting. Speakers are required to submit a list of expenses with copies of their itemized receipts to SHM. If it is their first time being reimbursed, a W-9 form will be required.

Chapters may decide to give gift cards for membership incentives and prizes. Provide SHM staff with the gift card denomination, recipient's name, and email address for each gift card the chapter would like to purchase. SHM staff will purchase the gift card on Amazon and send it via email directly to the recipient.

Purchase of Chapter Equipment

Chapters may utilize funds to purchase equipment needed for chapter-related activities. All equipment purchased for the chapter is the property of the Society of Hospital Medicine (SHM) and is to be used only for chapter business purposes, serving the interests of SHM and its members. SHM equipment may not be used for any other purpose.

To purchase equipment for your chapter, the following procedures must be followed:

1. Research the type of equipment the chapter is looking to purchase. Be sure to keep quality and price in mind. SHM staff can assist and provide recommendations as needed.
2. Provide SHM staff with the following information regarding the purchase:
 - Name and type of equipment;
 - Reason for the purchase/how the chapter plans to use the equipment;
 - Hyperlink to where the equipment can be purchased;
 - Your name and shipping address;
 - Signed policy for use and storage of equipment.
3. Upon SHM approval of the chapter's proposed equipment purchase, SHM staff will order the equipment, and have it delivered to the SHM National Office in Philadelphia, PA.
4. SHM staff will tag the equipment and document the model and serial numbers for tracking and liability purposes.
5. SHM staff will then ship the equipment to the chapter officer designated to store it.

At any time, SHM has the right to require the return of any and all chapter equipment to the SHM National Office. This may occur if, for example, there is reason to believe the equipment is being misused, or the chapter is inactive or sunset.



Chapter Initiative Fund and Chapter Start-Up Fund

Chapter Initiative Fund

All chapters of the Society of Hospital Medicine, both full and provisional, are eligible to apply for chapter funding through the Chapter Initiative Fund and Chapter Start-Up Fund. The Chapter Initiative Fund should be used to promote the value of your chapter to current and future members. Funding 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.

Applications for the Chapter Initiative Fund will open in June and close in August each year.

During this timeframe, chapters should select one leader to submit their application for funding toward chapter initiatives in the upcoming fiscal year (October - September). The total application budget should not exceed \$5,000. One well-developed project submission will be accepted per chapter. The Chapter Support Committee may determine to approve full or partial funding for your project. A chapter may receive a maximum of \$5,000 per fiscal year.

For more information on the Chapter Initiative Fund, including criteria for submission, funding guidelines, procedures, and application information, please refer to [Appendix XI](#).

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. 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.

Applications for the Chapter Start-Up Fund will be accepted on a rolling basis. New (Purple Health) chapters have up to one year since receiving provisional status recognition to apply. All applications are reviewed and approved by the Chapter Support Committee. Chapters should expect to be notified of approval within one month of the application submission date.

For more information on the Chapter Start-Up Fund, including criteria for submission, funding guidelines, procedures, and application information, please refer to [Appendix XII](#).





Exhibiting at Chapter Meetings

Local chapter meetings can be funded by pharmaceutical companies, staffing companies, or other corporations by having them exhibit at chapter meetings. For this to occur, the funding arrangement must follow the guidelines listed under the Exhibitor Contract on the last page of the exhibitor application. Industry Partners are not permitted to pay for meeting expenses directly and should submit payment to offset the display space directly to the SHM National Office.

Requirements

<p>Solicitation</p>	<p>At least two separate organizations are solicited per meeting (this is so your meeting does not appear to be “sponsored” by any one company). It is important for members to know that content and speakers are not provided/controlled by any pharmaceutical company.</p> <hr/> <p>Diversity in selection of organizations exhibiting at each meeting (if applicable). Nationally contracted exhibitors should receive priority over exhibit space at all chapter meetings. For all other companies, SHM recommends rotating the companies displaying at meetings throughout the year so everyone has a fair advantage to participate and members are seeing different companies at meetings.</p>
<p>Organizations Exhibiting</p>	<p>Can be allowed to discuss their product(s) at chapter meetings.</p> <hr/> <p>Can be allowed to set up a booth in a space separate from where the educational discussion will take place. If the venue does not allow for tables to be in a separate space, instruct your exhibitors to remove all promotional items prior to the start of the educational discussion.</p>
<p>Management of Funds</p>	<p>SHM’s National Office manages all exhibit funds for chapters. Organizations will send payment directly to the National Office where it will be included in your chapter’s balance of activities.</p>

Exhibitor Management

For each chapter meeting, one Chapter Leader must assume responsibility for working with SHM staff to arrange and coordinate exhibits. This may be the responsibility of the Treasurer, or it can be delegated to another officer. This chapter officer will work with an SHM staff member to determine the total number of displays that will be needed for budgetary purposes, as well as the total number of displays that the meeting space can accommodate. Chapter Leaders will need to confirm display table space with the venue, including any costs associated with exhibit table set-up. Additionally, the Chapter Leader must provide SHM staff with the contact information for the local representative of those interested in displaying at the chapter meeting. **An SHM staff member will contact the local representative to solicit their participation at the chapter meeting and provide an exhibitor contract. Exhibitors will sign and return the contract directly to an SHM staff member indicating that they agree to the stated compensation, terms, and conditions.** Chapter Leaders understand the following information will be requested from exhibitors and should be submitted via the Meeting Notification Form:

- Location and time of meeting
- Estimated number of attendees
- Educational presentation (topic and speaker)

Please be aware that SHM National has pre-negotiated exhibitor contracts to assist Chapter Leaders with the acquisition of funding. Chapter Leaders are not able to change the pricing negotiated within these contracts. Exhibitor prices are based on chapter membership size, average attendance, location, and chapter health status.

SHM staff will track all representatives who attend chapter meetings and utilize these contacts for future outreach. It is imperative that Chapter Leaders utilize local resources to obtain new representative contact information and share that information with the SHM National Office for future exhibitor solicitation for future meetings.

Prepaid Exhibitor Contract

What is it?

SHM works with corporations to secure pre-paid exhibitor packages for chapter meetings.

How does it work?

SHM staff prioritizes the securing of display space at chapter meetings with these companies. These companies are dedicated to supporting the chapter program, nationwide, for the year. By prioritizing these contracted vendors, it assists in SHM National's ability to re-sign contracts with these companies in the future and ensures the program continues to help fund chapter activities nationwide. Chapters that wish to reject a contracted company from displaying at their meeting may negatively impact other chapters that rely solely on these contracts to secure exhibitors for their meetings. SHM staff is able to source local representative contacts across the country to display at your chapter meetings. This is valuable to chapters if the local representative is currently unknown.

Note: If your local reps approach you directly about using funding for a display through the SHM contract, please confirm with SHM staff that there is funding available for them to utilize.

How does my chapter receive the funds for their display?

SHM will include the exhibit fee in the chapter's balance of activities.

Product Category

Dining, Coding and/or Documentation Hospital Health System Pharmaceutical/Biotechnology

Consulting Hospital Management Company Professional Society/Association

Recruiting/Staffing Company Other: _____

Scribe Services Other: _____

Recruitment Other: _____

is noted in the Exhibitor Contract, Rules binding agreement when accepted.

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FOR OFFICIAL USE ONLY

Chapter Name _____ Meeting Date _____

Meeting Location _____

Estimated # of Attendees _____ Meeting Topic _____

Exhibitor List _____

Exhibitor Application Form

SHM Chapters Program

Company Name _____ Company Website _____

Address _____

City/State/Province, Zip/Postal _____

Exhibitor Contact/Contact Person _____ Title _____

Phone _____ Fax _____

Email (optional) _____

PLEASE NOTE: Registration forms that do not include an email address will not be processed.

Exhibit Staff Personnel

Please complete for each representative attending the chapter meeting. Limit two representatives.

Name _____ Title _____

Email _____ Phone Number _____

Name _____ Title _____

Email _____ Phone Number _____

Exhibitor Contract

SHM Chapters Program

Exhibitor Contract and Additional Rules/Regulations

The below outlined guidelines are to be used in conjunction with the Chapter Exhibitor Application Form.

BOOTH OPERATIONS

Exhibitors should not operate in a way that violates the rights of another exhibitor. Exhibitors may not obstruct the view or interfere with the traffic of other exhibitors. Demonstrations and distribution of literature and samples should take place inside the assigned booth. Exhibit areas should be kept clean and in good order. No part of any exhibit or sign shall be posted, nailed, or otherwise attached to columns, walls, doors, or other parts of the building or its furniture in any way. The exhibitor is liable for damage to the booth or other areas.

If the event offers CME hours, advertisements and promotional materials cannot be displayed or distributed in the educational space immediately before, during, or after a CME activity. Providers cannot allow representatives of Commercial Interests to engage in sales or promotional activities while in the space or after the CME activity.

THIRD-PARTY REPRESENTATIVES

Any agency representing a technical or professional exhibitor must submit to client's name, contact information, address, telephone and fax numbers, and signature and title with its application.

USE OF THE SHM NAME, INSIGNIA, LOGO, OR ACRONYM

The Society of Hospital Medicine (SHM) name, insignia, logo, and acronym are proprietary marks. They may not be used in signs, advertising, or promotions in any media or product literature within or outside of the exhibit area. This rule applies before, during, and after the meeting, unless prior written approval has been received from SHM.

LIABILITY AND SECURITY

Exhibitors must make provision for safeguarding their display and property at all times. The exhibitor is responsible for all liability, losses, claims, and demands on account of any sign, display, or product literature within or outside of the exhibit area. This rule applies before, during, and after the meeting, unless prior written approval has been received from SHM.

CANCELLATION BY VENDOR

Cancellations must be received in writing. SHM will use the date of receipt of the written notice as the official cancellation. If an exhibitor cancels four weeks prior to the event date, the fee is 50%. Exhibitors will be required to pay the full fee if the cancellation is received within four weeks of the event.

DISTRIBUTION OF PRODUCTS

SAMPLES AND PRESENTS: Exhibitors may distribute products that they have manufactured. All other presents or samples are considered acceptable based on the American Medical Association (AMA) guidelines and the Council of Medical Specialty Societies' Code for Interaction with Industry in general. These presents should be under \$100 in value, relate to the physician's work or benefit the patient, and not affect or influence judgment.

FDA REGULATORY: Exhibitors are reminded of Food and Drug Administration (FDA) restrictions on the promotion of investigational and pre-approved drugs and devices. Exhibitors also are cautioned about FDA prohibition of promoting approved drugs for unapproved purposes.

SELLING OF PRODUCTS: Exhibitors may not accept cash, checks, or credit cards for merchandise in the exhibit area; however, orders may be taken.

BY SIGNING THE REGISTRATION FORM, YOU ARE ACCEPTING ALL RULES AND GUIDELINES LISTED ABOVE. SHM RESERVES THE RIGHT TO REFUSE ANY EXHIBIT APPLICATION AT ITS SOLE DISCRETION.

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Society of Hospital Medicine

How much does my chapter receive per display?

All prepaid exhibitor contracts are based on the tiered system below, if and only if, the fee is the same or lower than what is being offered to other displaying companies that do not have a signed contract with SHM. A contracted exhibiting company should never pay a higher display fee than a company that does not have a contract with SHM.

- **Tier 3:** \$1,500
- **Tier 2:** \$2,000
- **Tier 1:** \$2,500

Chapters are notified of the tier that they fall into at the beginning of the calendar year. This notification occurs in conjunction with the chapters' receipt of their Health Status Report. Below is the matrix used to determine each chapter's exhibit tier through the nationally signed contracts:

Blue Health	50+ Attendees on Average	Tier 1
	0-49 Attendees on Average	Tier 2
Green Health	40+ Attendees on Average	Tier 2
	0-39 Attendees on Average	Tier 3
Yellow, Orange, Red, or Purple Health	Any Attendance	Tier 3

Contact chapters@hospitalmedicine.org for more information.

Types of Financial Support

Consider these types of companies as exhibitors when seeking financial support for your chapter meetings:

Billing, Coding and Documentation

Hospital/Health Systems

Hospital Management Companies

Professional Society/Association

Pharmaceutical/Biotechnology

IT/Business Solutions

Recruiting/Staffing Company

Device

Diagnostics

Education

Media/Publications

Non-Profit

Managing Relationships

All chapters need to manage relationships with local reps that exhibit at their chapter meetings to ensure the exhibitors have a positive experience and display at future meetings. Chapter Leaders should incorporate a minimum of one hour of exhibit/networking time in their meeting agendas and are encouraged to be creative to ensure attendees visit with exhibitors during that time (e.g., exhibitor passport). This ensures exhibiting companies have the opportunity to:

- Generate new sales leads to increase profitability;
- Strengthen relationships and add new customers to grow and sustain success;
- Introduce new products or services;
- Give product demonstrations to strengthen customer confidence and referral potential.

Compliance

Consider the following scenario: A company has offered to cover the costs of dinner at your chapter meeting in exchange for a display and presentation to attendees. Is this permitted?

No. Companies may not directly pay for the expenses associated with any chapter meeting nor can they provide a presentation to attendees outside of their display.

Chapter Leaders, in accordance with the SHM Chapter Handbook, retain exclusive control of the agenda and all elements (e.g., topics or speakers) of any chapter meeting. Company-controlled presentations may not be utilized.

All relationships must be conducted in the most responsible way, with full consideration of issues surrounding conflict of interest and legal/regulatory compliance. Relationships should be conducted within the framework of the CMSS (Council of Medical Specialty Societies) Code for Interactions with Companies (www.cmss.org).

Can I share attendance lists with exhibitors?

No. Attendance lists, RSVP lists, and membership lists are property of the Society of Hospital Medicine and may not be shared. Exhibitors attending the meeting are permitted to collect attendee contact information (e.g., business cards) during their conversations with attendees at chapter meetings.

How do I know that an exhibitor has paid?

SHM staff will notify chapter leadership when a check or credit card payment has been received from an exhibitor.

If you do not receive a notification, it is likely that the payment has not yet been received. Note that it does take some companies several weeks to process payment.

Information on Display Fees

Exhibit fees should be determined based on the exhibit tier described above. SHM staff will negotiate the display fee with companies that are not contracted nationally. Typically, to minimize disparity among exhibitors, all participating companies are charged the same fee to display.

Factors that impact exhibit pricing include size of chapter (outreach), location of chapter (large metro vs. small or rural), expected number of attendees at meetings, number and types of institutions represented at meetings, and chapter health status.

Based on information gathered from chapter leaders and exhibitors, the recommended display pricing is:

Attendees	Exhibit Fee
1-39	\$1,500
40-50	\$2,000
50+	\$2,500

How many exhibitors should I have at a meeting?

Each chapter meeting should have two to three exhibitors, if possible. If attendance is expected to be larger than 50, a fourth or fifth exhibit may be needed.

Ensure that the number of exhibitors and the display fees paid by those exhibitors will cover the costs associated with the chapter meeting.



Activities

A successful chapter sponsors a variety of enriching activities for its members. This section provides an overview of what is considered a chapter meeting, as well as quick strategies to increase visibility, gain support, and increase member involvement.

Qualifiers for Chapter Meetings

Chapter meetings must be inclusive of all chapter members. Chapter Leaders may host meetings geared toward specific constituencies of membership (e.g., residents, students, or HMG leaders), however, these meetings are considered supplemental chapter meetings to the two required meetings that are inclusive of all SHM member types.

1. SHM must have access to the RSVP or registration list for all chapter events. This is particularly important for jointly sponsored or co-branded meetings.
2. SHM Chapter Leadership must select the content and speaker for the event. If the event is collaborative, SHM Chapter Leadership must actively participate on the meeting's planning committee and have influence over content and speaker selection.
3. All funding received (e.g., exhibitor fees, registration fees), as well as meeting expenses (e.g., food and beverage, speaker honorariums) will be processed through the SHM National Office. In the event the meeting is jointly sponsored or co-branded, meeting profits and losses will be split between the organizations and agreed upon prior to the meeting's occurrence.

Guidelines for Chapter Meetings

Chapter meetings are described as both educational and networking meetings that are inclusive of all chapter members and typically held at a local restaurant or hotel for local hospitalists to gather. SHM dedicates resources to provide support to chapters to conduct these activities in ways such as:

- **Venue/Vendor Contracts:** SHM reviews and signs all venue/vendor contracts. Payment is set up directly from SHM to the vendor/venue, eliminating the burden for volunteers to submit for reimbursement.
- **Registration:** A registration page is built for each event to collect information, including payment when applicable. This information is reported to Chapter Leaders in the Chapter Leader Portal and accessible via Eventzilla for non-paid events.
- **Marketing:** Events are promoted in HMX, in SHM's Monthly Event Newsletter, through dedicated email efforts to members and prospective members, and on social media. QR codes are created and embedded on branded promotional flyers for easy promotion and easy access to the registration page.

- **Exhibitor Management:** Exhibitor solicitation is conducted to all local contacts. An exhibitor application is created for each event to confirm attendance and collect and then process payment. SHM stores all local representative contact information for future outreach to participate in chapter events.
- **Speaker Management:** Outreach is conducted to speakers for necessary forms such as speaker agreements, W-9 forms, and COIs. Honorariums are then processed.
- **CME:** Applications and COIs are collected and reviewed per ACCME guidelines for approval of CME. An evaluation is created and shared with Chapter Leaders and attendees to complete.
- **Finance:** All finances are managed by the SHM National Office, including processing credit cards, check requests, providing necessary payments to venues/vendors, collecting receipts, W-9's, and other required documentation.
- **Abstract/Poster Competition Management:** SHM assists with the creation and promotion of competition guidelines and event information; coordinates with judges; and processes and disseminates prizes and awards.
- **Live Meeting Support:** SHM assists chapters with virtual and hybrid events by providing live meeting support through Zoom to switch over controls and troubleshoot any issues that may arise.

Approximately two-hundred-chapter activities take place each calendar year, therefore, it is vital for chapters to follow the guidelines as stated below:

The details of all chapter activities must be submitted via the Meeting Notification Form on SHM's Hospital Medicine Exchange (HMX). Chapter Leaders have the ability to revisit their form to add additional information, if necessary. Submission of this form alerts SHM staff at which point, staff will begin working on the chapter's event.

Notice of Chapter Meetings

- Chapter Leaders are encouraged to provide as much notice as possible to ensure adequate time for contract negotiation and signing with venues, exhibitor outreach, and marketing. Exhibitors typically require 6-8 weeks' notice for approval of funding.
- It is common for multiple chapter events to take place on the same date. Providing additional notice

for your event will allow staff the ability to plan ahead and allocate the necessary resources. When possible, please visit the HMX Calendar prior to scheduling. No more than 2 virtual chapter events can be conducted on the same day at the same time due to Zoom licensing restrictions.

Collaborative Events with other SHM Chapters

- Nature of Collaboration: please provide details as to how each participating chapter is involved in the event. Collaborative events will count towards the chapter's annual meeting requirements if the following is true:
 - Chapter Leadership was involved in the organization of the event and/or is contributing chapter activity funds towards the event should there be any expenses not paid for through meeting revenue.
 - There is attendance from the participating chapter's membership.

Collaborative Events with Outside Organizations

- Nature of Collaboration: please provide details regarding the reason for and nature of the collaboration. Please describe the financial relationship, logistical planning responsibilities of each organization, and who will be managing registration, exhibitors, and speakers. If the request is to provide marketing support only, with rights to use the SHM logo, please note this and whether the attendance list will be provided to SHM. **SHM requires an attendance list for a meeting to be considered a chapter event.**
- All promotional materials for the event should be co-branded with participating organization's logos. All materials with the SHM logo must be approved by SHM staff prior to their dissemination.
- All co-branded events are subject to approval by SHM staff. SHM staff will determine if a Letter of Agreement (LOA) is required to proceed with the event.

Chapter Meeting Administrative Fees (in-person)

- A flat fee of \$500 will be collected for all in-person events. *This fee may be waived to support chapters with limited activity funds and difficulty securing sponsors.*
- Chapters that wish to receive CME through SHM will be charged an additional \$500 fee.

Guidelines for Chapter Conferences (in-person and virtual)

Chapter conferences are described as meetings outside of a typical dinner meeting, networking-only event, and/or virtual educational talk (1-2 hours). Conferences are more complex to conduct from both a volunteer and staff perspective and require additional notice for adequate planning and promotion. **Chapter conferences are *not permitted to be held during SHM blackout dates, which can be found in the Chapter Leader Community and on the Meeting Notification Form found on HMX. Blackout dates are generally two weeks before or after SHM Converge, and one week before or after other smaller SHM meetings.*** Chapters and Districts must request approval from SHM to host all conferences to ensure alignment with national and regional activities. Please follow the guidelines as stated below.

Conference proposals should be submitted in writing to Lisa Kroll at lkroll@shm.org. Please allow up to 4-weeks for proposals to be reviewed and a decision made by SHM. Turnaround time will be quicker for conferences that have been conducted in the past and do not have significant changes to the agenda or budget.

Notice of Conference Planning

- Chapters and chapter districts are encouraged to provide at least one year's notice to ensure adequate time for contract review, negotiation, and signing. At a minimum, at least 6 months' notice is required.
- Conferences will be approved on a first come, first served basis. If necessary, conferences may be declined or deferred to a future date due to overlapping dates and staff support limitations.

Proposals should include the following information:

SHM Chapter or District-wide Events

- Proposed Meeting Date(s)
- Meeting Location (city/state for in-person events or indicate if virtual)
- Venue: let us know where the conference will be held or which sites you are considering. *SHM will review and sign all contracts once the venue has been selected.*
- Conference Description: please describe the goals and objectives of the meeting and including as many details as possible. For example, include the number of CME credits to be offered, networking opportunities, and any speaker requests of the SHM Board of Directors or CEO. If there is an associated poster/abstract competition, please mention that as well. Additionally, please include expected attendance numbers for both members and non-members.
- Agenda: provide a meeting agenda. This can be a skeleton/preliminary agenda that shows how the meeting will be structured.
- Budget: provide a meeting budget. Within the budget, please include all sources of revenue (registration and exhibitors), as well as anticipated expenses. SHM must review the final meeting budget and approve the proposed registration fees.
- Requests for onsite SHM staff support. This includes live support for both in-person and virtual events.

Collaborative Events with Outside Organizations

- Proposed Meeting Date(s)
Meeting Location (city/state for in-person events or indicate if virtual).
- Name of organization(s) the chapter is collaborating with.
- Conference Description: please describe the goals and objectives of the meeting and including as many details as possible. For example, include the number of CME credits to be offered, networking opportunities, and any speaker requests of the SHM Board of Directors or CEO. If there is an associated poster/abstract competition, please mention that as well. Additionally, please include expected attendance numbers for both members and non-members.
- Nature of Collaboration: please provide details regarding the reason for and nature of the collaboration. Please describe the financial relationship, logistical planning responsibilities of each organization, and who will be managing registration, exhibitors, and speakers. If the request is to provide marketing support only, with rights to use the SHM logo, please note this and whether the attendance list will be provided to SHM. *SHM requires an attendance list for a meeting to be considered a chapter event.* Please note that:
 - All promotional materials for the event should be co-branded with participating organization's logos. All materials with the SHM logo must be approved by SHM staff prior to their dissemination.
 - All co-branded events are subject to approval by SHM staff. SHM staff will determine if a Letter of Agreement (LOA) is required to proceed with the event.
- Agenda: provide a meeting agenda. This can be a skeleton/preliminary agenda that shows how the meeting will be structured.
- Budget: provide a meeting budget. Within the budget, please include all sources of revenue (registration and exhibitors), as well as anticipated expenses. *SHM must review the final meeting budget and approve the proposed registration fees.* If SHM is only providing marketing support, a budget is not required
- Requests for onsite SHM staff support. This includes live support for both in-person and virtual events.

Conference Planning Administrative Fees (in-person and virtual)

- 10% of meeting revenue (registration and sponsorship)
- A flat fee of \$500 will be collected.
- Chapters that wish to receive CME through SHM will be charged an additional \$500 fee.

Activity Planning Tips

SHM chapters can boost membership numbers and chapter participation by coordinating events for their members. SHM's most successful chapters offer a variety of events to meet each member's needs.

Plan ahead and plan early.

To ensure the greatest success for your events, be sure to plan months in advance. Speakers, exhibitors, and members often need several months' notice to plan for attendance at meetings and ensure availability of the necessary time and resources to attend.

Create an appropriate budget.

Determine the meeting budget and ensure that there is enough meeting revenue to cover meeting expenses including the \$500 administrative fee for in-person events. Consider the number of exhibitors you will have, and the venue being selected. Meetings should be held at modest venues that are centrally located to members within your chapter's geographical coverage.

Advertise.

Plan to advertise two to three months in advance of your meeting. The earlier you submit your Meeting Notification Form to the SHM National Office via HMX, the earlier staff can assist with the advertising of your event. If your meeting includes CME, extra time will be needed for administrative review by the SHM Education Department. CME cannot be advertised until final approval is received and an accreditation statement has been provided.

Follow up on the details.

Send written confirmations to speakers, vendors, and exhibitors.

Involve SHM members in your event activities.

Show non-members at your event the benefits of being an SHM member. Conduct a members-only door prize or raffle, reference a members-only chapter newsletter, or highlight the online discussions happening in your chapter's Hospital Medicine Exchange (HMX) community.

Always discuss member benefits and provide non-members the opportunity to join at your events.

Incorporate a brief talk (two to five minutes) on the value of SHM membership at the beginning of every chapter meeting. Utilize SHM's Member Benefit slide deck to share new updates with attendees. Print out the 10% Off Chapter Membership Form and bring copies to your events. Non-members can complete the form and email it to SHM to receive the discount. They can also join online and use the promotional code provided to your chapter. Consider having a laptop or iPad at your event with SHM's online join form available to be filled out by non-member attendees.

Thank the participants.

Send a thank you letter to all individuals who donated time, products, or money. They will be more likely to help out again in the future. Also consider sending a thank you letter or note to non-members for attending the meeting. Include an application to join SHM with the note.



Chapter Meeting Planning Checklist

- Decide the type of activity you would like to plan (educational presentation over dinner, half-day meeting, full-day meeting, social gathering, etc.).
- Determine whether your event will be in-person, virtual, or hybrid.
- **If virtual**, consider the features of both Zoom Meeting and Zoom Webinar and determine which platform best fits the needs of the chapter's event.
- **If virtual**, ensure that you are comfortable using the platform that has been selected. Reach out to SHM staff well before your event if you feel you need training or have questions.
- Estimate the number of people who will attend.
- Determine who will be invited (SHM dues-paying members only, both members and non-members).
- Decide if the meeting will be free or if there will be a fee to attend. Chapters should consider charging non-members a nominal fee to attend. If chapters wish to charge both members and non-members (recommended for longer CME meetings), the registration fee should be discounted for members.
- Determine the event budget.
- **If in-person**, find a venue and confirm the date and time.
- Select a topic(s) for educational meetings.
- Find speaker(s) for the event.
- Create a meeting agenda.
- Collect exhibitor representative contact information.
- Submit all details via the Meeting Notification Form in HMX to SHM staff. Meeting venue contracts must be included with your submission for review and approval (signature) by an SHM staff member.
- Work with SHM staff to confirm exhibitors. SHM staff will solicit exhibitor participation.

Chapter Meeting Week-of Checklist

- Confirm with all exhibitor representatives: thank you for participating, payment received, guidelines for exhibiting, and logistical details for arrival at the meeting.
- **If in-person**, confirm estimated attendance number with the venue (utilize the RSVP list).
- Confirm logistical details with speaker(s).

- **If in-person**, have a computer, iPad, or smartphone on site with the Eventzilla app loaded for attendee check-in. Be sure to test before your event.
- **If in-person**, print membership applications and any other promotional collateral needed.
- **If virtual**, set the tone for your meeting up front. Encourage attendees to turn cameras on when appropriate, mute/unmute themselves, and/or utilize the chat box to facilitate better engagement.
- **If virtual**, don't expect attendees to start the conversation. Conduct ice breakers, develop talking points, create polls, utilize breakout rooms, and be prepared to facilitate conversation.
- Discuss member benefits and leadership opportunities at every meeting. This is important to remind existing members of their benefits as well as educate prospective members on why they should join.
- Reach out to attendees before and after the meeting. Also consider reaching out to those who registered and could not attend. Thank them for attending and invite non-members to join SHM.

Chapter Meeting Post Reporting

- Attendance for in-person events should have been collected through Eventzilla and through Zoom for virtual events. This ensures that SHM staff can reconcile your chapter meeting, track member engagement, and send follow-up emails as needed. SHM staff can provide you with the attendance list for meetings where registration was collected through Zoom and Eventzilla. Submitting attendance lists in a timely manner and utilizing Eventzilla for in-person attendee check-in will contribute toward a Green or Blue Health Status.
- Post a summary of your meeting in your chapter's community on HMX, and start a discussion around the past event to build interest in future meetings.
- Follow up with any interested members or non-members to further engage them with SHM/your chapter.

Plan a Variety of Chapter Activities

Educational

Rotate the topics and speakers at each of your meetings to keep members' interests. Utilize your meetings to survey attendees on topics they are interested in hearing about in the future.

Non-educational

Most chapters will incorporate an hour or more for socializing at their events. On occasion, chapters may want to consider hosting events focused solely on networking for hospitalists, allowing them to engage fully with one another. Consider making these events a members-only benefit. Non-members may be invited to attend member experience events in an effort to recruit them to join. It is recommended that non-members be charged a nominal fee to attend to prevent no-shows and ensure that they are interested in SHM.

Community

Chapters may want to extend their influence by reaching out to the local community through community service events. Please submit the details of this event to a SHM staff member for review.

Membership Drives

Host a meeting to talk about the value of SHM membership, the benefits, national meetings, and engagement opportunities. Utilize the SHM promotional slides, found in the Chapter Leaders Community on HMX.

Career Meetings

Have a job fair or host a panel of hospitalists from the health systems in your region to talk about local opportunities.

Research, Innovations and Clinical Vignettes (RIV) Competition

Host a local abstract/poster competition. Each chapter can select one local winner to be automatically accepted into the RIV Competition at the SHM Annual Conference.

Wellness

Host an event on physician burnout and promote the health and wellness of hospitalists.

Receiving CME at Chapter Meetings

Chapters can apply for Continuing Medical Education (CME) credits for educational activities. A minimal charge of \$500 for each activity (no limit on credit hours) will be processed from your chapter's activity funds for administrative fees. Chapter Leaders can follow the steps below to apply for CME. Note: It is recommended that chapters keep CME as an SHM members-only benefit. This will encourage non-members to join.

Step 1

Attend a CME application training webinar with SHM's Education Department. Webinars/trainings are held upon request. A recording of past trainings is available in the Chapter Leaders Community in HMX.

Step 2

Submit your CME application when submitting your Meeting Notification Form in HMX at least four to six weeks prior to publicizing your event. To ensure proper promotion of your meeting, please submit your application two to three months in advance of your meeting date. Applications will be accepted up to four weeks prior to your event.

Step 3

Submit all Conflict-of-Interest (COI) Forms for your leadership, speakers and administrative planners to SHM's Education Department. See Appendix XIII for a COI Form.

Step 4

The SHM Education Department will notify you of the approval of your application and the number of credit hours that the chapter meeting is eligible for. They will also generate an accreditation statement to be included on ALL of the promotional materials for the meeting. SHM staff will then begin an email campaign for your meeting.

Step 5

Collect attendance through Eventzilla for in-person events and through Zoom for virtual events. Staff will then send attendees a link to complete their evaluation through the online Learning Portal. After the evaluation form is complete, a digital CME certificate will be generated.



Representation at SHM Annual Conference

Attendance at national events is instrumental to the success of your chapter. It is important that your chapter is represented at SHM meetings and that those attending the meetings bring back information and ideas to share with the chapter's membership.

SHM Annual Conference

The annual conference brings together more than 5,000 hospitalists from the United States and around the world. All SHM leadership, including the Board of Directors, District Chairs, and Chapter Leaders, transition at SHM's Annual Conference.

Chapter Ribbons: Attendees and leaders are encouraged to represent their chapter while at the SHM Annual Conference by affixing a chapter ribbon with their chapter name on it to their name badge. Doing so makes it easier to identify fellow members from your chapter while at the conference.

Chapter Excellence Awards: Chapters receiving Chapter Excellence Awards will be recognized for their achievement on signage throughout the meeting, at the Awards Plenary, at the Chapter Leader Summit, and throughout the conference. Please see [Appendix VI](#) to review the full program overview including additional ways the chapters are recognized for awards.

Chapter Leader Summit: The Chapter Leader Summit is a reception hosted exclusively for Chapter Leaders at each annual conference.

Chapter Leader Training: The Chapter Support Committee hosts a training session for current and future Chapter Leaders at each annual conference. It is highly recommended that all Chapter Leaders attend this training.

Research, Innovations and Clinical Vignettes Competition: Chapters that hold local RIV competitions can nominate one winner to be automatically accepted into the RIV Competition at SHM's Annual Conference. Please see [Appendix XIV](#) for more information on hosting a competition for your chapter, including guidelines and scoring rubrics.



Advocacy

SHM Chapters may not independently organize legislative meetings or advocacy initiatives. This is primarily to prevent the risk of duplicated efforts and confusion from the perspective of policymakers, but such activity can also negatively impact SHM's non-profit status. If Chapters are interested in advocating for hospital medicine, they can work with SHM staff to identify opportunities as they arise. Additionally, Chapter members can participate in SHM's Grassroots Network, which plays an integral role in shaping policy. By sending messages to Congress and participating in opportunities provided by SHM, Chapters can make a difference.

Chapter members can sign up online at hospitalmedicine.org/grassroots

Advocacy Education for Chapters

SHM has resources that can help increase education around advocacy and key policy issues. If a chapter is looking for more specific information, it should reach out to the SHM National Government Relations Department. Chapters may request SHM National Government Relations staff to offer an educational session at a chapter meeting to provide more information about SHM's advocacy efforts, deeper dives on policy topics of interest, and how chapters or individuals can be involved.



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