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Society of Hospital Medicine

Chapter Handbook

Updated January 2025

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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. SHM's vision is to be the professional home of hospitalists dedicated to exceptional and equitable care for acutely ill patients.

As the home for hospitalists, SHM activates and engages our community to:

- Advocate for our specialty, our members, and the diverse patients we serve.
- Promote high-value care and optimal outcomes for acutely ill patients.
- Meet the evolving educational needs of a dynamic specialty.
- Cultivate an inclusive community for hospitalists and support career growth and well-being.
- Advance the research and innovation of healthcare delivery, quality, safety, and experience across the care continuum.

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

- Networking and engagement opportunities with other hospitalists in their community.
- Providing inclusive and accessible volunteering and participation opportunities to members.
- Sharing educational content to improve the quality of practice in both clinical and administrative aspects.
- Conveying information about important national initiatives, trends, policy issues, and events to the members of the chapter.

In addition, each SHM chapter should aim to:

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

As a Chapter Leader, you have a very important role in managing your local chapter and serving as the point of contact in the two-way flow of information between SHM National and the chapter.

This SHM Chapter Handbook has been created as a reference guide for Chapter Leaders. We wish you and your chapter much success! If you have any questions, please contact chapters@hospitalmedicine.org or the following SHM staff who serve as your main points of contact:



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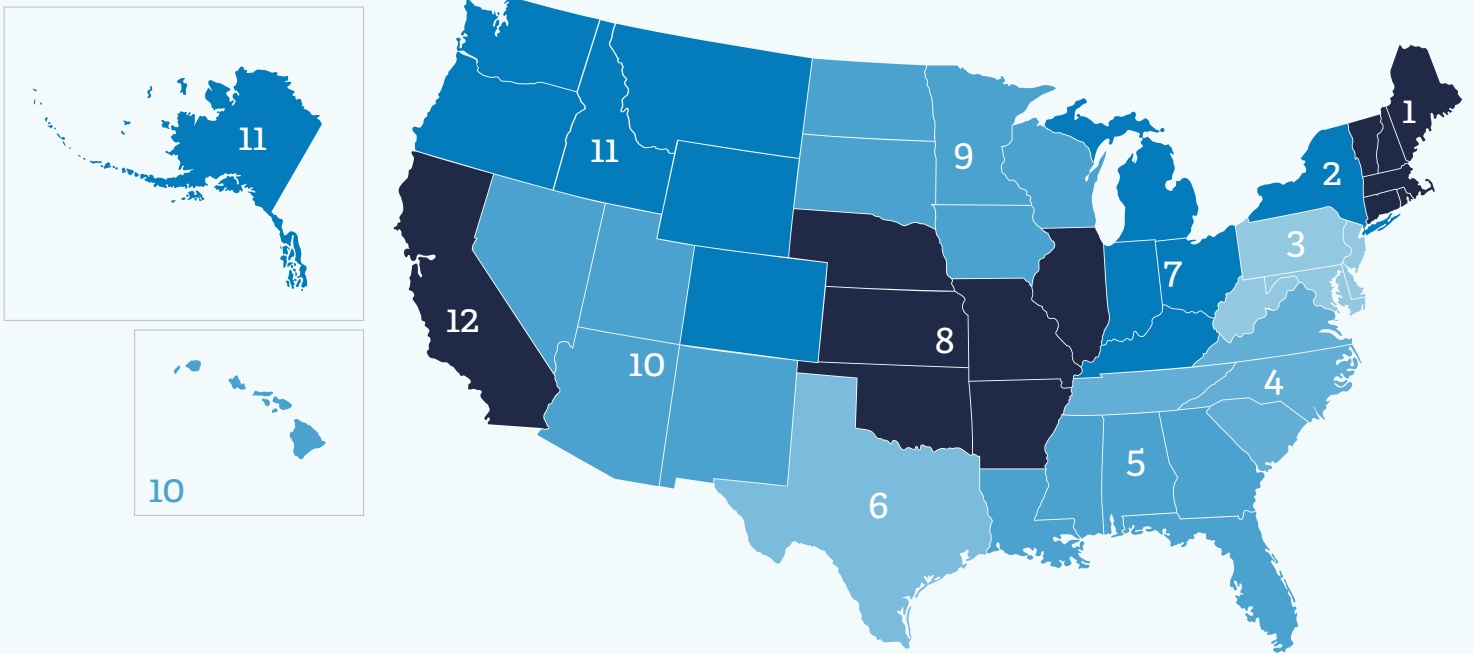
Chapter Support Committee

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. The members of the committee consist of the 12 District Chairs as well as any District Chairs currently being onboarded.

SHM Structure

The Society of Hospital Medicine is the only national association entirely devoted to hospital medicine.

SHM chapters are not separately incorporated from the Society and are managed by SHM National 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.



Districts and District Chairs

Chapters are grouped into 12 geographical districts (see Chapter District Map above). Each district is represented by a District Chair who is appointed by the SHM National Board of Directors. District Chair positions are one-year terms that are renewable for up to four years.

The role of the District Chair is to:

- Coordinate and cultivate all chapters within the geographical bounds of the district.
- Support and mentor current and future Chapter Leaders.
- Receive a health status report for chapters within their district as well as a copy of each chapter's Activity Planning Document.
- Attend chapter meetings within the district as frequently as their schedule allows, coordinating with the visiting chapter who is responsible for covering any travel costs.
- Serve on the Chapter Support Committee.

Please visit www.hospitalmedicine.org/chapters for a current listing of chapters and District Chairs.

Board Liaisons

A member of the SHM National Board of Directors serves as a liaison to each chapter district. The Board Liaison provides strategic oversight with the District Chair.

When requested and as schedules permit, SHM Board representatives and the SHM CEO may attend chapter meetings. Chapters are responsible for any travel costs resulting from such invitations.

Keeping Informed

Hospital Medicine Exchange (HMX)

Chapter Leaders should become familiar with their respective Chapter Community and the Chapter Leader Community within SHM's **Hospital Medicine Exchange (HMX)** platform. The Chapter Leader Community should be utilized for the following:

- Networking with other SHM Chapter Leaders.
- Obtaining access to relevant forms.
- Locating resources and tools.
- Reviewing updates and news from the Society.

Chapter Leader Newsletter

Chapter Leaders will receive communication on a regular basis through multiple channels, including an e-newsletter. The newsletter will inform Chapter Leaders of SHM policies, include helpful resources, and provide important updates and reminders.

Quarterly District Calls

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.

Chapter Leadership Trainings

New and seasoned Chapter Leaders should attend as many training opportunities as possible to stay up to date with guidelines, news, and resources, as well as to build new connections across the chapter community. At least one Chapter Leader from each chapter must attend one or more trainings annually. Annual trainings include, but are not limited to:

- Chapter Leader Onboarding: held virtually in the spring each year.*
- Chapter Leader Training Program: takes place in person at SHM Converge every year.
- Eventzilla Training: takes place annually or on an as-needed basis with individual chapters.
- Chapter Leader Portal Training: takes place annually or on an as-needed basis with individual chapters.

Additional virtual trainings are scheduled throughout the year and will be communicated to Chapter Leaders.

**SHM expects each chapter to have its own Chapter Leader onboarding in addition to what SHM staff provides to ensure new leaders are comfortable with their new roles and responsibilities.*



Chapter Requirements

Chapters are evaluated on an annual, calendar year basis. The evaluation will be based on the chapter's achievement of the criteria and requirements listed in this section. A chapter's health status is based upon an evaluation of the chapter's meeting of requirements to maintain Full Status 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 SHM Leadership. Requirements are described in seven different categories which are assigned numerical points that the chapter can earn by meeting the requirements of that category. Below is a description of each requirement.

Requirements of Full Status Chapters

Membership Engagement 3 or 6 Points

A chapter's membership engagement score is determined by taking the total number of unique member attendees of chapter meetings held in the given calendar year and dividing it by the number of members assigned to the chapter as of January of the same calendar year (**# of unique member attendees / # of members assigned to the chapter**). Chapters with an engagement score of 10% or higher will receive 6 points. Chapters with an engagement score between 5-9% will receive 3 points. Chapter membership numbers as of January of each calendar year will be utilized to calculate the membership engagement score. Quarterly reporting of each chapter's membership engagement score will be provided at the time of District Calls.

<p>Leadership 3 Points</p>	<p>The chapter maintains a minimum of three leadership positions filled by current dues-paying members of SHM. While not required, SHM recommends each chapter have a president, vice president, and secretary/membership director position. Chapters are required to have defined roles and terms for each chapter leadership position and terms must begin and end with SHM's annual conference, Converge. All chapters must follow the same election cycle, described in the Chapter Organization and Leadership section (page 11). Chapters that maintain a minimum of three active leaders with defined roles and terms throughout the year will receive 3 points.</p>
<p>Chapter Meetings 3 Points</p>	<p>The chapter must hold at least two meetings each calendar year that are inclusive of all chapter members. These are typically networking and educational events held over dinner during the week. For more information on what qualifies as a chapter meeting, please visit the Chapter Meetings section (page 13). Chapters that conduct two meetings within the calendar year will receive 3 points.</p>
<p>Administration 2 Points</p>	<p>A Meeting Notification Form must be submitted for every meeting conducted by the chapter. While registration will be set up for chapters by SHM staff, Chapter Leaders are responsible for checking in attendees on-site at in-person meetings through Eventzilla. Chapters will not be permitted to organize their next chapter meeting until the attendance list has been received. If an attendance list is lost, Chapter Leaders must attend an Eventzilla training with SHM staff to proceed with their next meeting. Chapters that submit all Meeting Notification Forms with 6+ weeks' notice and collect attendance for each meeting in Eventzilla will receive 2 points.</p>
<p>Quarterly District Calls 1.5 Points</p>	<p>At least one Chapter Leader must attend three out of four quarterly District Calls each year. All calls are scheduled by SHM staff and take place via Zoom. Chapters that attend three out of four calls annually will receive 1.5 points.</p>
<p>Leadership Training 1.5 Points</p>	<p>At least one Chapter Leader must attend one or more training opportunities annually. Chapters that attend one or more training opportunities will receive 1.5 points.</p>
<p>Reporting 1 Point</p>	<p>Chapter Leaders must submit the chapter Activity Planning Document in the spring on time to SHM staff and should consider this their road map for the year. This document should help define the chapter's goals tied to membership engagement for the upcoming year as well as the types and timing of events they plan to hold. Goals and meeting plans will be discussed on the quarterly District Calls. SHM staff will disseminate the form to Chapter Leaders and prompt them to complete it by the given deadline. If the report is not received on time, the chapter may not organize its next meeting until the report has been received. Chapters that submit the chapter Activity Planning Document on time will receive 1 point.</p>

Health Statuses

A chapter's health status is determined by calculating the total number of points earned by meeting the requirements described above. There are five health statuses into which a chapter can fall. Below is a description of each:

FULL STATUS	Green (18/18)	A Green Health Status describes Full Status Chapters that meet requirements in every Health Status Category, earning the maximum points possible. Green Health Status Chapters receive full incentives and support options available to chapters and are eligible to apply for awards.
	Yellow (13/18)	A Yellow Health Status describes chapters that meet most of the requirements of all Health Status Categories described below, earning between 13 and 17 points out of the 18 available. Yellow Health Status Chapters have limitations as described in the Chapter Meetings section of this handbook.
PROVISIONAL	Orange (<13/18)	An Orange Health Status describes chapters at risk of being sunset due to Full Status requirements not being met and earning less than 13 points of the 18 available. Orange Health Status Chapters have one additional year to meet 72% (13 of 18 points) of requirements (Yellow Health Status). If they are not met after the second year, the chapter will be sunset. Orange Health Status Chapters have limitations as described in the Chapter Meetings section of this handbook. SHM staff and the District Chair will support at-risk chapters in working towards Full Status requirements in the second year.
NEW CHAPTER	Purple (N/A)	A Purple Health Status describes new chapters that are working towards meeting Full Status requirements. Purple Health Status Chapters have limitations as described below in the Chapter Meetings section beginning on page 13. SHM staff and the District Chair will support new chapters in learning Health Status Categories to work towards receiving Full Status.
SUNSET	Red (<13/18)	A Red Health Status describes chapters that were previously in Provisional Status that will be sunset due to Full Status requirements not being met in the allotted time frame.

Chapter Excellence Awards

SHM's Chapter Excellence Awards program honors chapters with exemplary contributions to serve members on the local level in various categories. Green Health Status Chapters may apply for Chapter Excellence Awards in January for activities conducted in the previous calendar year. Chapters are recognized through various channels described in the program details which will be made available in 2025.



Membership

Member engagement on the local level is the chief metric of success for SHM chapters. This section provides information on SHM chapter membership.

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. Members also have the option to add additional chapters to their membership during the join and renew process. 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.

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

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

International Hospitalists: Non-U.S. and non-Canadian individuals.

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.

Emeritus: hospitalists who have been a member of SHM for 10 or more years, are 65 years of age or older, and are working fewer than 20 hours per week.

Accessing Chapter Membership and Information about Members

Chapter Leaders can access member lists through the Chapter Leader Portal found on the My Account page on SHM's website. Typically, the Chapter's President and Membership Director are assigned access to the Portal. The information provided should be used to help grow your chapter, sustain current memberships, and drive engagement with SHM. View more information on reports and how to access the Chapter Leader Portal [here](#).

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 any outreach. This will also ensure that members' solicitation preferences are up to date.

All SHM members within your geographical region will be automatically subscribed to the chapter's HMX 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.

Emails such as chapter meeting invitations, election information, and e-newsletters will be sent out in an SHM-branded template by SHM National to an updated list of members in your chapter.

Membership Join and Renewal Payments and Access to Benefits

All membership joins and renewals must be processed by SHM National. 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 or by mail via a printed application or renewal invoice. Chapters are not allowed to store or process payments.

Members will need to keep their membership active to ensure that they have full access to member benefits.

Share the Value for SHM Members on the Local Level

Chapter Leaders can connect SHM members with the organization at a local and personal level. Chapters should generate new ideas for member-only programs and initiatives that add value for SHM membership locally. Be prepared to discuss membership benefits with prospective members and communicate why they should join SHM. Below are a few suggestions:

- SHM membership provides the opportunity to get involved at the chapter leadership level, or through committees, special interest groups, and advisory councils.
- Members gain access to the entire chapter network (even those who are unable to attend meetings) through the chapter's online networking community.
- Provide and share opportunities that only SHM members may participate in. Below are a few suggestions:
 - » Member-only educational and/or networking events.
 - » Establish opportunities for members to get involved. Leadership positions are a great way to build involvement in the organization and at the chapter level.
 - » Distribute a chapter newsletter to keep members up to date on what is happening in your chapter. This is available for Green Health Status Chapters only.
 - » Conduct local hospitalist awards.
 - » Nominate members for SHM National Awards of Excellence.
 - » Endorse members for SHM's Fellow designation (FHM/SFHM).

At chapter meetings, Chapter Leaders should utilize the SHM Member Benefit PowerPoint slides, available in the Chapter Leader Portal on SHM's website. Present the benefits of membership to attendees or have the slides on a loop throughout the networking part of the event. Add upcoming chapter events and opportunities to get involved with the chapter.

Make sure you know who the members and prospective members are at your meeting. Review the registration list beforehand to fuel your conversations with attendees while at the meeting.

Don't forget to talk about SHM membership outside your chapter meetings with colleagues and other connections you have made locally. Schedule meetings at hospitals, host a lunch, or conduct a small networking event to talk about chapter activities and the benefits of joining SHM.

To help chapters with their recruitment efforts, SHM offers a 10% discount to any **new** member recruited through a chapter via a discount code or dedicated weblink. Chapter Leaders may contact an SHM staff member for the discount code associated with their chapter.



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.

Chapter Governance Document

The Chapter Governance Document allows chapters to document leadership roles, job descriptions, and terms, and define a succession plan.

Establishing Your Local Leadership Team

Good chapter governance will help ensure the chapter meets its goals while giving SHM members an opportunity to get involved.

Requirements

Although each leadership position within a chapter may operate differently, all Chapter Leaders must meet the following requirements:

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

Selection of Leadership

Election Procedures

The timing for all chapters' election procedures must align with that of the SHM National Board.

October-January: Call for Nominations

January-February: Elections

February - March: Notification

March - May: Officers take office
(aligns with SHM Converge)

Call for Nominations

Every dues-paying member in the chapter should be given the opportunity to be nominated for a chapter leadership position. Staff will confirm the chapter's leadership positions that will be open for nomination, including the job descriptions and terms of office. SHM National will collect nominations through an online form and they will be shared with the current Chapter Leaders upon closure of the nomination period.

Chapter Leader Terms of Office

Chapters must establish terms of office for each Chapter Leader position and include them in the chapter's Governance Document. When establishing leadership positions, chapters must define whether those positions' terms may be renewable. SHM recommends a two-year renewable term for each position (not required).

Election Procedures

All SHM members within a chapter's geography 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.

Planning Leadership Meetings

Chapter Leadership 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.





Chapter Meetings

A successful chapter conducts a variety of enriching activities for its members. Chapter meetings are described as both educational and networking events that are inclusive of all chapter members and typically held at a restaurant or hotel for hospitalists to gather. Chapter Leaders must:

1. Submit the meeting details to SHM staff within the [Meeting Notification Form](#).
2. Select the topic(s) and speaker(s) for the event.
3. Ensure all funding received (e.g., exhibitor fees, registration fees), as well as meeting expenses (e.g., food and beverage, speaker honorariums), is processed through the SHM National Office.
4. Collect attendance and report it to SHM staff at the time of the meeting.

Chapters must conduct two of the following events described below per calendar year:

Dinner Meeting

SHM chapters are unique in their ability to provide education and networking opportunities to members in accessible locations multiple times a year. A standard SHM chapter meeting typically includes at least one hour of networking with exhibitors and an educational presentation held over dinner. **All chapters except Orange Health Status Chapters are eligible to apply for CME through SHM.**

Networking-only Event

Chapters may wish to host meetings focused solely on networking for hospitalists in the community. Chapters should consider making these events a member-only benefit or charging non-members a nominal fee to attend. **Chapters in all Health Status categories are eligible to conduct networking-only events, however, only Green Health Status Chapters are eligible to conduct events that include activity-associated costs (e.g., sporting events).**

Scientific Abstract Competition

Chapters may conduct scientific abstract/poster competitions and should follow the guidelines for SHM's National Scientific Abstract Competition as closely as possible. Chapters should require an active SHM membership for participation.

Full Status Chapters (Green and Yellow) may conduct Scientific Abstract Competitions and follow the guidelines below for competition prizes. Provisional Status Chapters (Orange and Purple) should focus on meeting Full Status Chapter requirements by hosting standard dinner meetings and networking events.

Green Health Status Chapters

- First-place competition winner will be automatically accepted to the national competition at Converge.
- The chapter may utilize activity funds towards Converge registration and abstract submission fee, travel reimbursement, and/or gift cards up to \$500.
- The chapter may utilize activity funds to cover costs such as e-abstract hosting fees and/or gift cards to thank participating judges up to \$50.

Yellow Health Status Chapters

- The chapter may utilize activity funds towards Converge registration and abstract submission fee, travel reimbursement, and/or gift cards up to \$500.

Chapter Conference

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. Please submit all requests to Lisa Kroll at lkroll@shm.org. **Only Green Health Status Chapters are permitted to conduct larger-scale events like conferences.**

Collaborative Events

Chapters may wish to collaborate with other SHM chapters to host activities for members. The participating chapters should inform SHM staff with details of the event, including how each participating chapter is involved, within the **Meeting Notification Form**. Collaborative events will count towards the chapter's health status requirement if the following is true:

1. Chapter Leadership was involved in the organization of the event and may or may not be contributing chapter activity funds toward the event should there be any expenses not paid for through meeting revenue.
2. There is attendance from the participating chapter's membership.



Collaborative Events with Outside Organizations

All collaborative events with outside organizations are subject to SHM approval. Collaborative events with outside organizations will count towards the chapter's health status requirement if the following is true:

1. SHM receives the attendance list with full contact information in Excel format, unless it is being managed by SHM through the Eventzilla platform in which attendance should then be collected by Chapter Leadership through Eventzilla.
2. SHM Chapter Leadership actively participates in the meeting's planning committee and has influence over the content and speaker selection.
3. All promotional materials are co-branded with the SHM logo. All materials utilizing the SHM logo must be approved by SHM prior to dissemination.

Notice of Chapter Meetings

Chapter Leaders must provide a **minimum of six weeks' notice** via the [Meeting Notification Form](#) to ensure adequate time for contract negotiation and signing with the venue, exhibitor outreach, and marketing.

No more than two virtual chapter events can be conducted at the same time due to Zoom licensing restrictions. Please visit the [HMX Calendar](#) prior to scheduling to ensure proposed dates do not conflict with other events.

Ancillary Chapter Activities

In addition to the two meetings above, chapters may organize additional activities for members, including but not limited to:

Membership Drive

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

Member-Only Event

Increase the value of SHM membership by providing opportunities available to just dues-paying members within the chapter. Entice prospective members to join by making them aware of member-only events.

Chapter Awards Celebration

Honor and celebrate chapter members for their achievements through your own developed chapter awards.

Celebrate Graduating Residents Becoming Hospitalists

Host a small networking event or provide recognition at a dinner meeting to celebrate graduating residents who are going into hospital medicine. Welcome them to SHM and encourage them to join as a member and get involved in the chapter.

Planning Responsibilities and Guidelines

Select a Meeting Date

Confirm a date that works with the Chapter Leaders, speaker, and venue. Plan two to three months in advance so there is enough time to plan and provide notice to SHM staff.

Confirm a Speaker

Chapters typically leverage local members and experts as speakers for their meetings who are willing to present at your meeting. Professional speakers, the SHM Board of Directors, and SHM staff may also be requested. Refer to the budget guidelines before conducting your outreach.

Pharmaceutical companies are prohibited from providing speakers and/or honorariums, educational content, and from directly paying for meals.

Select a Venue

Chapters should select venues that are centrally located for 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. *Chapters and Chapter Leadership are not authorized to sign any agreements. ALL agreements must be reviewed and signed by SHM prior to moving ahead with a venue. SHM staff will provide a credit card directly to the venue for payment and will follow up to request an itemized receipt.*

Refer to the budget guidelines before reaching out to potential venues.

Create a Meeting Budget

All chapters should have a working budget of all necessary expenses, balanced against any revenue earned through exhibitor display and/or registration fees. Funds received and not utilized by the chapter will be available to the chapter for future activities. All funding and expenses are handled through SHM National. Chapter Leaders may request a balance update of their current funds at the time their meetings are being held.

Chapters need to create a meeting budget that incorporates enough exhibitor and/or registration revenue to cover meeting costs. Existing chapter activity funds can also be utilized to supplement costs when necessary. Chapters should follow the guidelines below for all events:

Food and Beverage

Chapters should keep food and beverage expenses below \$125 per person, inclusive of tax, gratuity, and a maximum of two alcoholic beverages (beer and wine only).

Venue Rental

Chapters should avoid locations with rental fees if possible or keep to \$500 or below for chapter educational and networking events. Green Health Status Chapters may seek approval from SHM for venue rentals above \$500 but less than \$1000.

Speakers

Chapters may graciously host local speakers, provide a public thank you, and provide a meal during the meeting. Chapter Leaders may consider giving a gift card up to \$200 as an additional gesture of thanks. SHM will purchase the gift card and send it via email directly to the speaker. A W-9 form and speaker agreement are not required in this instance.

Chapters may provide a maximum honorarium of \$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. 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. SHM travel policies must be followed. A W-9 form will be required for reimbursement.

Additionally, chapters may request an SHM Board Member / CEO / Staff Member to present at your meeting. In these cases, the chapter must cover travel-related expenses.

Meeting Supplies

Chapters may utilize funds for rental of supplies required for a successful meeting. This may include badges, flyers (printing), and signage. For poster competitions, supplies may include poster boards, easels, and/or monitors.

Chapters are encouraged to make the check-in process with attendees as smooth as possible. Consider what is needed from a supply perspective to make this possible.

Audio Visual (A/V)

Chapter Leaders are responsible for selecting a venue that offers adequate A/V required for your event to be successful (ex. projector screen, microphone). Determine what costs are associated with the A/V required and submit all requests to SHM staff.

Activity-Associated Costs

Green Health Status Chapters hosting networking events that include an activity with associated costs should ensure the combined expense of food, beverages, and the activity remains below \$125.

Gift Cards and Abstract/Poster Competition Prizes

Gift Cards

Chapters may decide to give gift cards for membership incentives or prizes. Gift cards may not be independently purchased by the chapter. Provide SHM with the gift card denomination up to \$200, the recipient's name, and the email address for each gift card the chapter would like to purchase.

Chapters conducting gift card raffles should reserve participation to members only as an incentive for non-members to join in order to participate.

Chapters may utilize funds for additional raffle prizes, such as an SHM membership, Converge registration, SHM Converge On Demand, *State of Hospital Medicine (SoHM)* Report, SHM-branded merchandise, and educational books.

Scientific Abstract Competition Gift Cards and Prizes

Green Health Status Chapters

- First-place competition winner will be automatically accepted to the national competition at Converge.
- The chapter may utilize activity funds towards Converge registration and abstract submission fee, travel reimbursement, and/or gift cards up to \$500.
- The chapter may utilize activity funds to provide gift cards to thank participating judges up to \$50 each.

Yellow Health Status Chapters

- The chapter may utilize activity funds towards SHM Converge registration and abstract submission fee, travel reimbursement, and/or gift cards up to \$500.

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 the 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.
- Chapters that wish to receive CME through SHM will be charged an additional \$650 fee (no limit on credit hours).

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

- A flat fee of \$500 plus 10% of meeting revenue (registration and sponsorship).
- Chapters that wish to receive accredited CME will be charged an additional \$650 fee (no limit on credit hours).



Additional Expense Guidelines

Chapter Leadership Planning Meetings

Chapter Leaders are permitted to utilize activity funds towards a strategy or planning meeting up to four times per year (quarterly) with a maximum spend of \$100 per person, including food and beverage, tax, gratuity, and up to two alcoholic beverages.

Membership

Entice non-members to join by using chapter funds to offset the cost of membership. Funds cannot be utilized to renew existing members or for Chapter Leader membership dues.

Membership Recruitment Lunches

Schedule a lunch meeting at local hospitals to discuss the benefits of SHM membership. Entice those in your community to join and get involved in the chapter.

Awards and Plaques

Full Status Chapters (Green and Yellow) may utilize activity funds to purchase physical awards or plaques to recognize Chapter Leaders and local members.

Promotional Items

Full Status Chapters (Green and Yellow) may purchase SHM-branded items for your chapter through SHM staff.

Chapter Leader Sponsorship

Green Health Status Chapters that have acquired an activity balance of more than \$10,000 can utilize their funds for travel to attend SHM Converge or SHM's Leadership Academy. Only one reimbursement is permitted per Chapter Leader throughout his or her tenure. Written approval from all Chapter Leaders must be provided to staff.

Hill Day Participation with SHM National

SHM chapters can sponsor members to join SHM National for a day of Advocacy Action on Capitol Hill. Information on how to participate is shared with chapters in late spring/early summer.

Acquire Funding

In addition to acquiring exhibitors to help offset expenses, Chapters may decide to charge a registration fee for events. Charging registration fees can also reduce the number of no-shows at events. The cost of registration for members must always be less than the fee for non-members. All registration fees will be collected by SHM.

Registration and Attendee Check-in

A registration page is built for each event by SHM staff to collect information, including payment when applicable. This information is available to Chapter Leaders in the Chapter Leader Portal and via Eventzilla.

In-person Meeting Registration and On-site Check-in

SHM utilizes Eventzilla as the platform for hosting chapter meeting registration and attendance check-in. Eventzilla provides SHM and Chapter Leaders with the ability to view registration information and operate the check-in process at in-person chapter meetings.

Chapter Leaders are required to check in attendees through Eventzilla for every in-person chapter meeting.

Attendance information collected via Eventzilla will be utilized to calculate the Membership Engagement Score for Chapter Health Status.

Pre-registration is required to attend all chapter meetings, however, SHM understands that individuals who are not pre-registered may walk in. Those individuals will need to register via the Eventzilla online registration link while on-site to ensure all attendees at the event are counted.

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

personal device and access the registration page to finalize their registration.

When submitting the **Meeting Notification Form** for your upcoming chapter meeting, you will be asked which Chapter Leader and email address should receive access to Eventzilla. SHM staff will provide this Chapter Leader/ email address with access to the event once the registration page has been created. On the **Meeting Notification Form**, Chapter Leaders can select whether or not Eventzilla training is needed (repeat users may not require training).

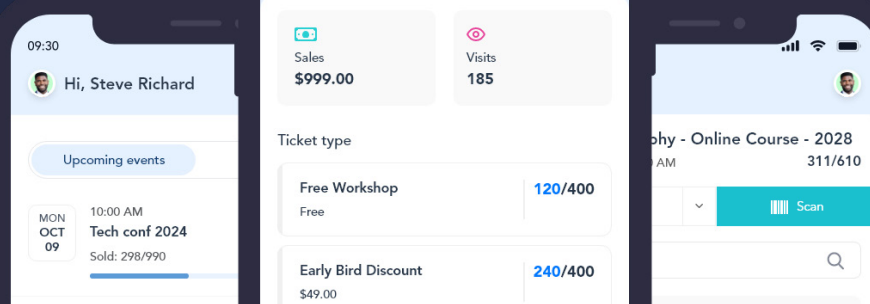
Please log in to Eventzilla a few days **BEFORE** the chapter meeting to ensure you are comfortable with the platform and the attendee check-in process.

It is recommended that Chapter Leaders print the registration list to utilize as a sign-in sheet in case of on-site technical issues with Eventzilla.

Eventzilla can be accessed on a mobile device by downloading the **Eventzilla Organizer app** or in a web browser at www.eventzilla.net. Full instructions on how to access and utilize Eventzilla can be found [here](#).



Eventzilla
Organizer



Registration for hybrid events will be collected through Eventzilla.

- In the 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 on-site through the Eventzilla web platform or app. Zoom will automatically track those who join the meeting virtually.

Virtual Meeting Registration and Check-in

Many SHM chapters broaden their outreach to the chapter membership by hosting virtual meetings. SHM utilizes Zoom for all virtual chapter meetings and will create a registration page in Zoom for each meeting. SHM staff will join the virtual meeting a few minutes before the start time and switch the host over to the Chapter Leadership. Chapter Leaders will then have full host capabilities to launch polls, breakouts, and mute/unmute attendees. After the host has been switched from SHM staff to the Chapter Leadership, SHM staff will log off the meeting unless their presence has been requested in advance and agreed upon. The Zoom platform will record attendance automatically. For more information about Zoom, please visit our FAQ document [here](#).

Applying for CME

Chapters can apply for Continuing Medical Education (CME) credit for educational activities by following the steps below:

Step 1

Submit your CME application when submitting your Meeting Notification Form 6 weeks+ in advance of your meeting date.

Step 2

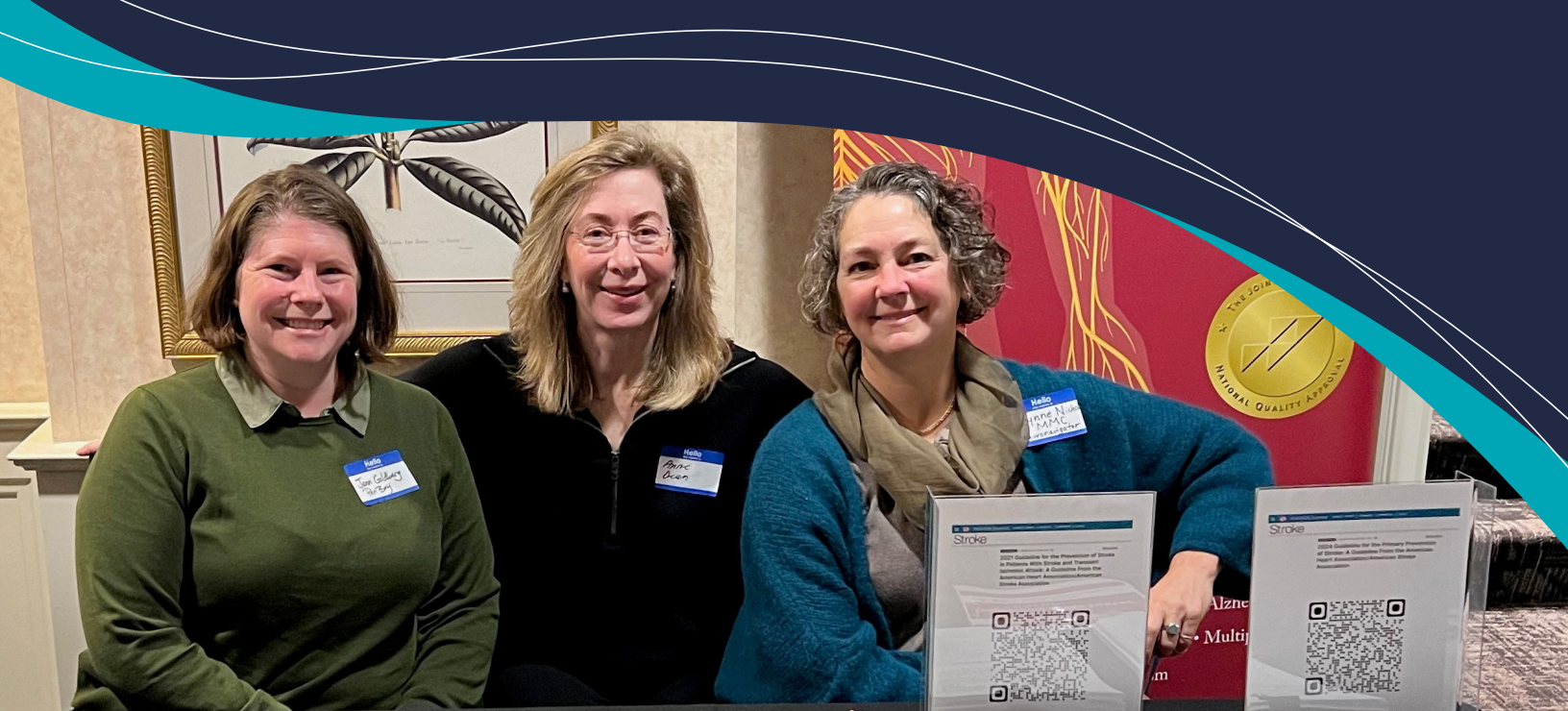
Submit all Conflict of Interest (COI) forms for your leadership, speakers, and administrative planners to SHM staff.

Step 3

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 in ALL promotional materials for the meeting. SHM staff will then begin an email campaign for your meeting.

Step 4

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



Exhibiting at Chapter Meetings

Chapters have exhibitors to help fund their meetings. Exhibitor arrangement must meet the following guidelines, which are also listed within the SHM-provided Exhibitor Contract.

Requirements

<p>Solicitation</p>	<p>At least two separate organizations are solicited per meeting. It is important for members to know that content and speakers are not provided/controlled by any pharmaceutical company.</p> <hr/> <p>There should be diversity in the selection of organizations exhibiting at each meeting (if applicable). Nationally contracted exhibitors will receive priority over exhibit space at all chapter meetings.</p>
<p>Exhibitor Booths</p>	<p>Exhibitors are permitted 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 exhibitors to remove all promotional items prior to the start of the educational discussion.</p>
<p>Management of Funds</p>	<p>SHM National manages all exhibit funds for chapters.</p>

Exhibitor Management

For each chapter meeting, one Chapter Leader must assume responsibility for coordinating with exhibitors. 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 with the contact information for the local representative of those interested in displaying at the chapter meeting. **SHM will contact the local representative about their participation at the chapter meeting. Chapters may not negotiate or contract directly with exhibitors. SHM will handle all contracting and payment formalities.**

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 SHM National for future exhibitor solicitation for future meetings.

SHM has pre-negotiated exhibitor contracts to assist chapters with securing funding for meetings. Nationally contracted exhibitors receive priority in receiving notice and space at chapter meetings. Through these contracts, SHM is able to identify local representatives across the country that Chapter Leaders may or not be in contact with.

Exhibitor Rates

SHM sets standard exhibit rates based on the following factors: size of chapter, location of chapter, expected number of attendees at meetings, number of institutions generally represented at meetings, and market value for the display.

To minimize disparity among exhibitors, all exhibitors must be charged the same rate. Any deviation of these rates may be adjusted at the discretion of SHM.

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

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

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 representatives that exhibit at their chapter meetings to ensure the exhibitors have a positive experience and will want to 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.**

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 the 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?

Reach out to SHM staff to confirm payment has been received from an exhibitor.

Marketing and Communications

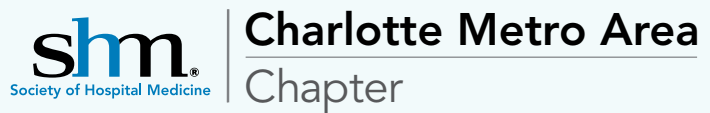
Regular communication keeps SHM at the forefront of members' minds and helps to reinforce they are a part of a vital, dynamic organization and SHM National will provide assistance with these efforts. To ensure consistency with the SHM brand and voice, Chapter Leaders must follow the guidelines and procedures outlined below with respect to:

- Logo and brand use
- Chapter web presence
- Email opportunities
- Chapter marketing efforts
- 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 prior approval from SHM. Chapters must utilize SHM for all flyers, brochures, and other marketing materials.

Logo Examples



Chapter Web Presence

Each chapter's landing page is created in the Hospital Medicine Exchange (HMX) and follows a unified template. SHM staff will assist Chapter Leaders with maintaining relevant content on each chapter page. Chapters are **prohibited from creating individual websites.**

Chapter Web Updates Performed by SHM

- **Updated Chapter Leader Information:** SHM staff will add and remove chapter leadership listings.
- **Governance Documents:** SHM staff will post any updated Governance Documents in the HMX Chapter Community.
- **Chapter Events:** A link to the [Meeting Notification Form](#) is located on the Chapter Leader's Dashboard in the Hospital Medicine Exchange (HMX). Once completed, SHM will create the chapter event in the chapter's own HMX community. Events will also be visible on the Master Calendar within 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 will design chapter newsletters upon request available to Green Health Status Chapters only. The newsletter will be added to the downloadable files in the chapter's HMX community and emailed out to chapter members.

Updates That Chapter Leaders Can Make Independently

- **Chapter Meeting Notifications:** Accessible from the Chapter Leader's Dashboard in HMX.
- **Chapter Meeting Updates for Webpage:** Chapter 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.
- **Send 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.

View best practices for utilization of HMX [here](#).



Email Opportunities

Meeting Invitations

Prior to each chapter meeting, SHM will deploy a series of email invitations within the chapter’s designated geography. Invitations will deploy on Saturday mornings at 10:00 a.m. in the recipient’s time zone.

E-Newsletters

Green Health Status Chapters may email the content you would like included in the newsletter in a Word document as well as photos (ideally high-resolution) to SHM staff. Upon receipt, SHM will create the e-newsletter and follow up with any questions. Chapter e-newsletters are a member-only benefit and will be distributed via email to chapter members only. The newsletter will also be accessible in the chapter’s community in the [Hospital Medicine Exchange \(HMX\)](#).

Social Media

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 ensure that all social media channels associated with SHM share the same goals, Chapter Leaders must adhere to the guidelines below.

- Chapters may not create chapter-specific social media profiles or accounts.
- Chapter Leaders and constituents may tag @SocietyHospMed on X (formerly Twitter) and Instagram and/or Society of Hospital Medicine on Facebook or LinkedIn. The decision to share or retweet to SHM’s followers is at the discretion of SHM.

Each SHM chapter has its own unique chapter hashtag to utilize in sharing photos and/or news from chapter events. Please find your chapter’s hashtag [here](#).

Chapter Leaders may also use SHM-branded social media event flyers to promote upcoming events on their personal social accounts. Access these flyers within the [Meeting Notification Form](#).



Marketing Options for Chapters

Promotional Items for Purchase

Full Status Chapters (Green and Yellow) may use funds to order marketing and promotional items following SHM approval. Contact SHM staff to discuss placing an order for promotional items.

SHM Member Benefit PowerPoint

PowerPoint slides with SHM branding and information about member benefits can be accessed within the Chapter Leader portal and utilized at chapter meetings.

Chapter Event Flyers

On the [Meeting Notification Form](#), Chapter Leaders may choose to have an event flyer created. Chapter Leaders will receive a digital copy of the finished event flyer to print and distribute.



SHM San Diego Chapter Meeting flyer. It features the SHM logo and 'San Diego Chapter' text. The main title is 'SHM SAN DIEGO CHAPTER MEETING'. Below the title is a 'REGISTER' button. A circular image shows a man speaking at a podium. The date and time are 'May 20, 2023 6:00 - 9:00 P.M. EST'. Below this is a placeholder for a featured speaker: 'FIRST LAST, MD, SFHM, ETC' and 'FEATURED SPEAKER' with a list of titles and affiliations. At the bottom, it lists 'Exhibitor Displays and Networking 6:00 - 7:00 P.M. EST' and 'Dinner and Guest Presentation 7:00 - 9:00 P.M. EST'. A QR code is in the top right corner.



SHM San Diego Chapter Meeting Meeting Agenda flyer. It features the SHM logo and 'San Diego Chapter' text. The main title is 'SHM SAN DIEGO CHAPTER MEETING'. Below the title is a 'REGISTER' button. The date and time are 'May 20, 2023 6:00 - 9:00 P.M. EST'. The agenda items are: 'Exhibitor Displays and Networking 6:00 - 7:00 P.M. EST' and 'Dinner and Guest Presentation 7:00 - 9:00 P.M. EST'. Below the agenda are three circular images of speakers, each with a placeholder: 'SPEAKER NAME, MD, SFHM, ETC' and 'Cardiologist, Secondary Title Name, Employer or Hospital Name'. A QR code is in the top right corner.



SHM San Diego Scientific Abstract Competition flyer. It features the SHM logo and 'San Diego Chapter' text. The main title is 'SHM SAN DIEGO SCIENTIFIC ABSTRACT COMPETITION'. Below the title is the date and time 'May 20, 2023 6:00 - 9:00 P.M. EST' and the location 'Virtual or Location 123 Anywhere St., Any City'. The flyer includes sections for 'Call for Abstracts', 'Submission Categories' (with three category names), 'Submission Deadline: Friday, June 12, 2023 at 11:59 p.m. EST', 'Abstract Submission Instructions', and 'Notification of Acceptance: Monday, June 15, 2023'. A 'REGISTER' button is at the bottom. A QR code is in the top right corner.



Advocacy

SHM chapters may not independently organize legislative meetings or advocacy initiatives. If chapters are interested in advocating for hospital medicine, they can work with SHM 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. Chapters may request SHM Government Relations staff 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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