



# 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

<b>Leadership</b>	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.)
<b>Define Chapter's Geography</b>	<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"><li>• <b>Statewide Chapter:</b> represents all members within state borders.</li><li>• <b>City/Metro Area:</b> represents members within one specific metropolitan area. Provide a list of counties for defined geography.</li><li>• <b>Multi-State:</b> represents members within more than one state. It does not necessarily need to represent entire states. Provide a list of counties for defined geography.</li></ul>
<b>Meetings</b>	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.
<b>Demonstrated Interest</b>	New chapter applicants must have a petition signed by a minimum of 10 hospitalists from at least two institutions. See <a href="#">Appendix IV</a> 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](http://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](http://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:

	<b>One Hour</b> Networking hour with exhibitors
	<b>Half Hour</b> Welcome, introduction of founding leaders, discussion about chapter goals and plans for the chapter's first year
	<b>One Hour</b> 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
<b>Blue</b>	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.
<b>Green</b>	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.
<b>Yellow</b>	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.
<b>Orange/ Provisional</b> (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.
<b>Red</b> (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.
<b>Purple/ Provisional</b> (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.
<b>Blue</b>	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.
<b>Green</b>	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.
<b>Yellow</b>	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.
<b>Orange/ Provisional</b> (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.
<b>Red</b> (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.
<b>Purple/ Provisional</b> (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.

<b>Health</b>	<b>Engagement with Nationally Provided Programs</b> 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	<b>Engagement Initiatives for SHM Constituents</b> 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.	<b>Membership Recruitment and Retention</b> 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.
<b>Blue</b>	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.
<b>Green</b>	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.
<b>Yellow</b>	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.
<b>Orange/ Provisional</b> (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.
<b>Red</b> (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.
<b>Purple/ Provisional</b> (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.