

# *Chapter Leader Onboarding*

July 12, 2023

# Chapter Engagement Team

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<https://clra.himsschapter.org/>

# *Vision*

To realize the full health potential of every human, everywhere.

# *Mission*

Reform the global health ecosystem through the power of information and technology.

# Membership Types

- **Individual (all include chapter)**
  - HIMSS
  - Chapter only\*
  - Student\*
  - Life/retired\*
- **Organizational (all include chapter)**
  - Organizational Affiliate (unlimited membership for employees)
  - Corporate Member (# of memberships based on level)
  - Non-Profit Partner (1 comp membership, additional may be purchased at discounted rate)
- **Digital (does not include chapter)\***
  - Access to news and resources (free for 1-year)



*\*Unable to serve in chapter leadership position*

<http://clra.himsschapter.org/membership-1>

# The Value of HIMSS Chapter Membership

[www.himss.org/chapters](http://www.himss.org/chapters)



## Connect

Engage with local HIMSS members about issues that impact your community.



## Learn

Access targeted education programs and initiatives. Earn CEUs for CPHIMS, CAHIMS and more.



## Lead

Bring your passion and experience to a volunteer leadership role in your chapter.



# North America Chapter Engagement

BETWEEN JUNE 2021 AND JULY 2022

55

HIMSS NORTH AMERICAN CHAPTERS



Networking Hours  
350+



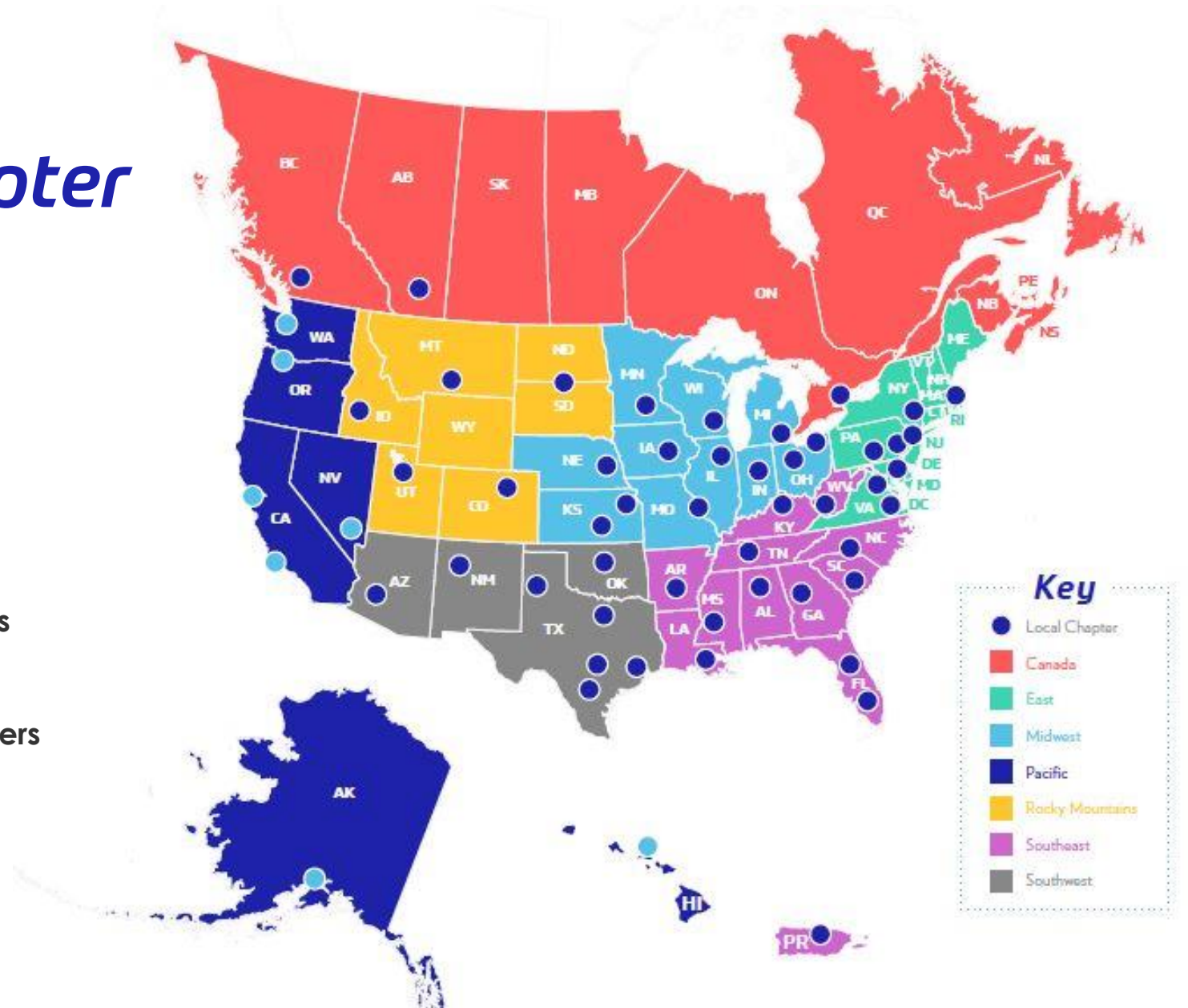
Education Hours  
750+



Volunteer Leaders  
775+

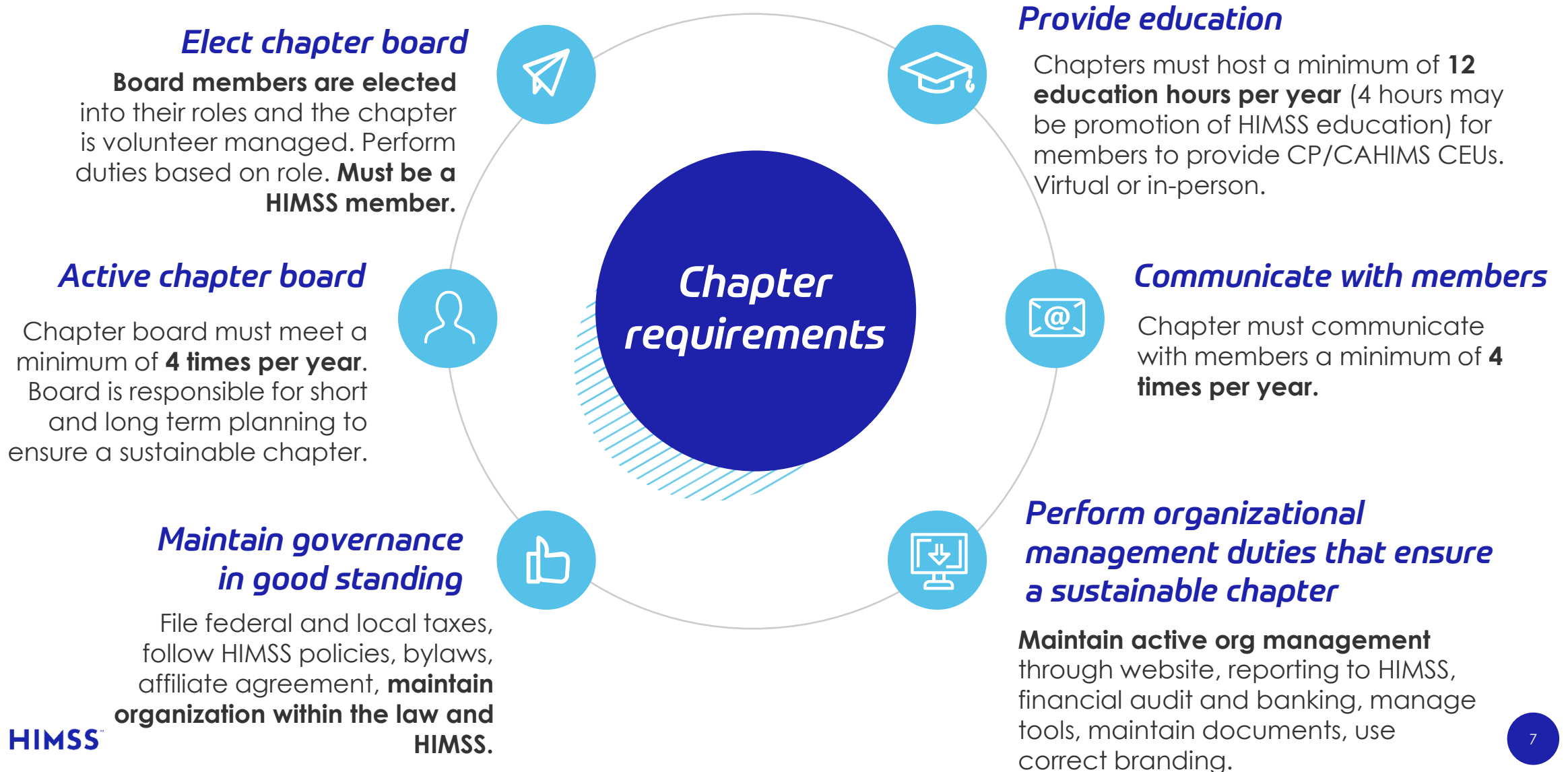


Chapter Members  
70,000

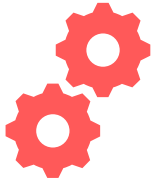


**Key**

- Local Chapter
- Canada
- East
- Midwest
- Pacific
- Rocky Mountains
- Southeast
- Southwest



# *Onboarding Resources*



**Onboarding manual**



**Short brand guidelines**



**Chapter vs staff  
responsibilities breakdown**

<https://clra.himsschapter.org/chapter-leader-development>  
<https://clra.himsschapter.org/marketing-materials-0>



# Transition Next Steps

## Q1 Actions



### Submit

- Accountability Reporting: Board List (July 1)
- Accountability Reporting: Admin Report (August 1)



### Update

- Chapter email forwarding and board group recipients
- Chapter banking information and at least two signatories



### Review

- Governance materials and accessible on document repository
- Chapter development resources and training sessions



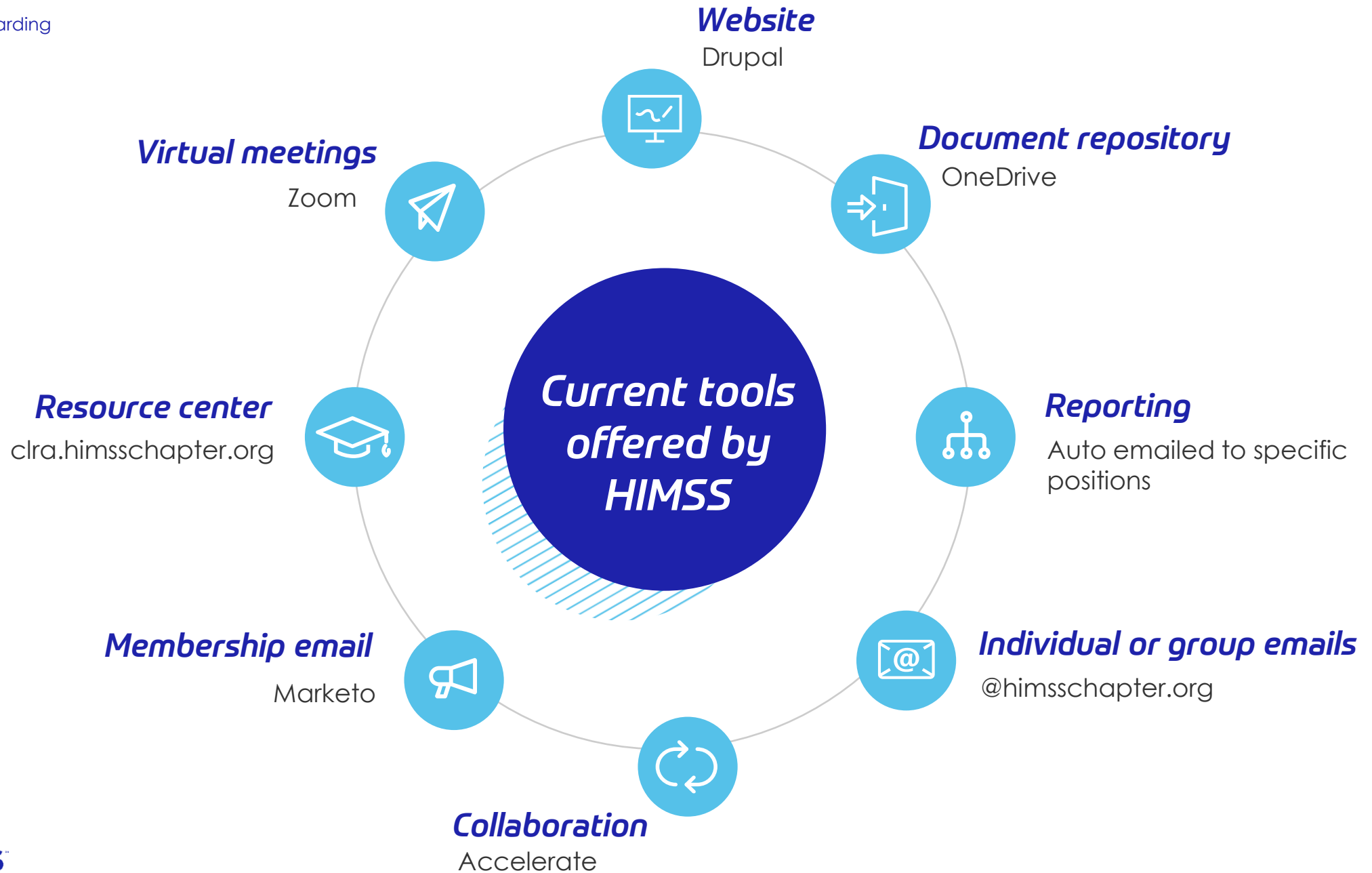
### Notify

- Membership communication with new leadership
- Social media and web announcements

# *Chapter Leader Development*

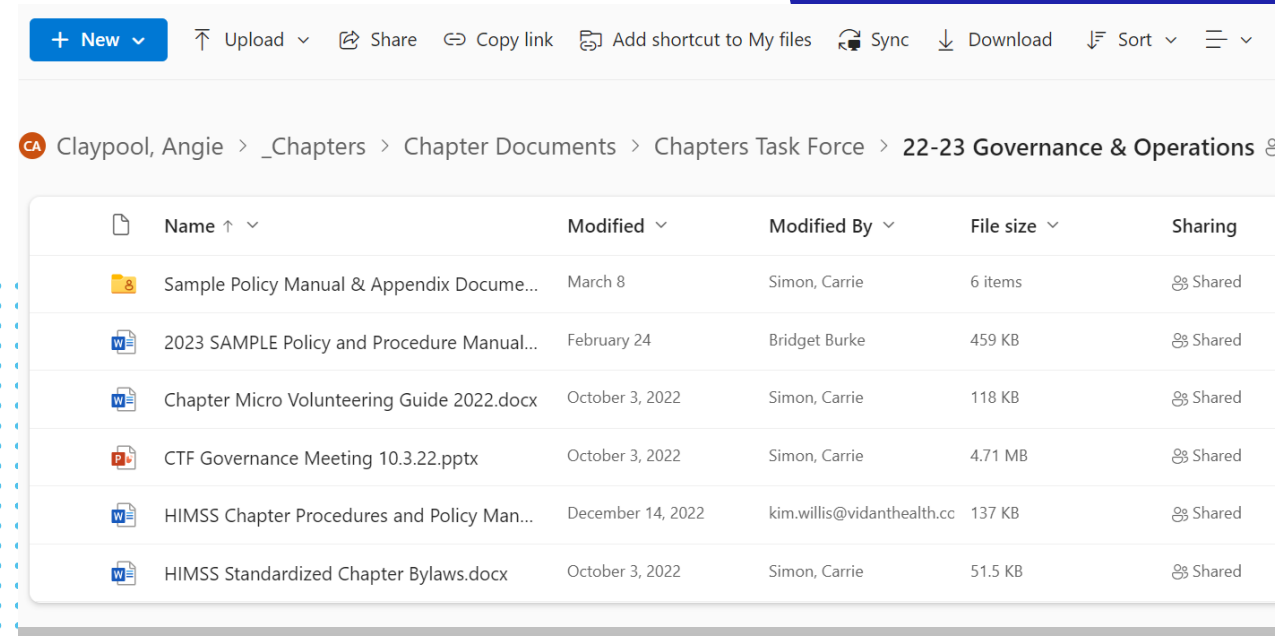
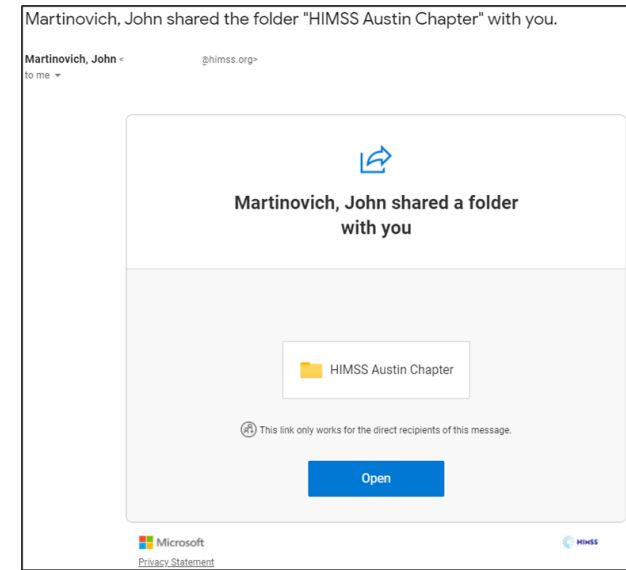
- **Resource portal for chapter leaders**
  - Position handbooks
  - Webinar recordings
- **Chapter Leadership Academy**
- **Chapters Task Force**
- **In-person training**
  - Global Conference (\$100 off)
- **Newsletter \ “must know” emails**





# Document Repository - OneDrive

- Access is granted based on the submitted board list
- Additional members can be added throughout the year, email [chapters@himss.org](mailto:chapters@himss.org)
- Follow the email and security prompts to gain access
- Bookmark OneDrive for easier access
- Utilize OneDrive as a collaboration tool and document repository for the board and committees



# *Automated Chapter Reports*

***Sent out based on position as identified in the board roster***

- **Membership list – sent out on the 1<sup>st</sup> Friday of each month**
  - President, president-elect, membership chair, and communications chair
- **Rebate report – sent out on the 10<sup>th</sup> of each month**
  - President and treasurer
- **OA report – as needed**
  - Email your chapter manager
- **Google Analytics Report – sent out on the 1<sup>st</sup> of each month**
  - Chapter's president email address ([president.chapter@himsschapter.org](mailto:president.chapter@himsschapter.org))



# Membership Report

- **Details tab is all current chapter members. Key areas to sort by:**
  - **Type:** OA, Individual, CM, etc.
  - **Membership join date:** welcome new members
  - **Membership renewal date:** remind members to renew
  - **Chapter and membership join date:** determine membership length for board eligibility
- **Demographic summary tab shows membership % by worksite, role, and membership type**
- **Membership types tab is a cheat sheet for what the membership types mean**

Worksite	Percentage	Professional Role	Percentage	Membership Type
Academic Education Institution	4.08%	Business Development	.27%	Affiliate Corporate Membership
Academic Medical Center	11.74%	CEO, Chairman, Pres., Exec Dir, Admin, Group Practice Mgr	1.30%	Annual Chapter Membership
Ancillary Clinical Service Provider	.43%	CFO, VP/Finance, Finance Director, Controller	.43%	Diamond Corporate Membership
Banks / Financial Services	.22%	Chief/ Executive Director/ VP/ Pharma/ BioTech	.05%	Emerald Corporate Membership
Community Health Center Clinic	.38%	Chief/ Executive/ VP/ Digital Health/ Innovation	.11%	Gold Corporate Membership
Critical Access Hospital	.43%	Chief of other Clinical Dept/Lab Srv/Pharmacy	.65%	Individual Market Supplier Membership
Entrepreneur, Startup, Disruptor	1.14%	Chief Public Health Officer	.05%	Individual Organizational Affiliate
Financial, Legal, Investment Firm	.33%	CIO, VP of IT/IS	3.10%	Life Membership
Government	1.03%	Clinical Informaticist	1.14%	Platinum Corporate Membership
Government Health Provider	.11%	CMIO, CNIO, CCIO	1.52%	Regular Member
Healthcare Consulting Firm	5.76%	CMO, Medical Director, Chief of Staff	.60%	Regular Member - Complimentary
HIE Organization	.33%	CNO, VP of Nursing	.05%	Retired Membership
Home Healthcare Org	.49%	Compliance Officer/Compliance VP/Director/Manager	.05%	Staff Member
Hospital, Multi-Hospital System, Integrated Delivery	54.57%			Student Individual Organizational Affiliate

# Finance Report

- **Chapter Dues Revenue**
  - \$23/year for individual, corporate, and chapter-only members.
  - Up to 4% of annual contract payment for Organizational Affiliate members (may be shared among multiple chapters)
- **Summary tab gives overview of dues by membership type**
- **Detail tab gives details of all dues**

	CHPTR	CORP	OA	REG	Total
ABC		\$23.00			
123	\$23.00			\$253.00	
XYZ		\$23.00			
8675409		\$23.00			
312		\$92.00			
Purple			\$524.58		
<b>Total</b>	<b>\$23.00</b>	<b>\$161.00</b>	<b>\$524.58</b>	<b>\$253.00</b>	<b>\$961.58</b>

# Website Transition



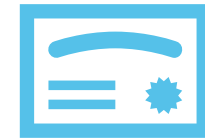
## Timeline

Release schedule broken out into 3 phases, view on CLRA



## How to prepare

- Remove outdated content and contact information
- Share current board list and upcoming events with HIMSS



## Training Guides

Access, navigation, basic pages, events, modules, sponsor recognition, Board of Directors overview, homepage slider, version control



# Communication

## Chapter Leader eNews

- Sent to all chapter leaders the 2<sup>nd</sup> Tuesday of each month
- Confirm your subscription preferences in the [himss.org](https://himss.org) member center
- Add [himss@emailhimss.org](mailto:himss@emailhimss.org) to safe senders list

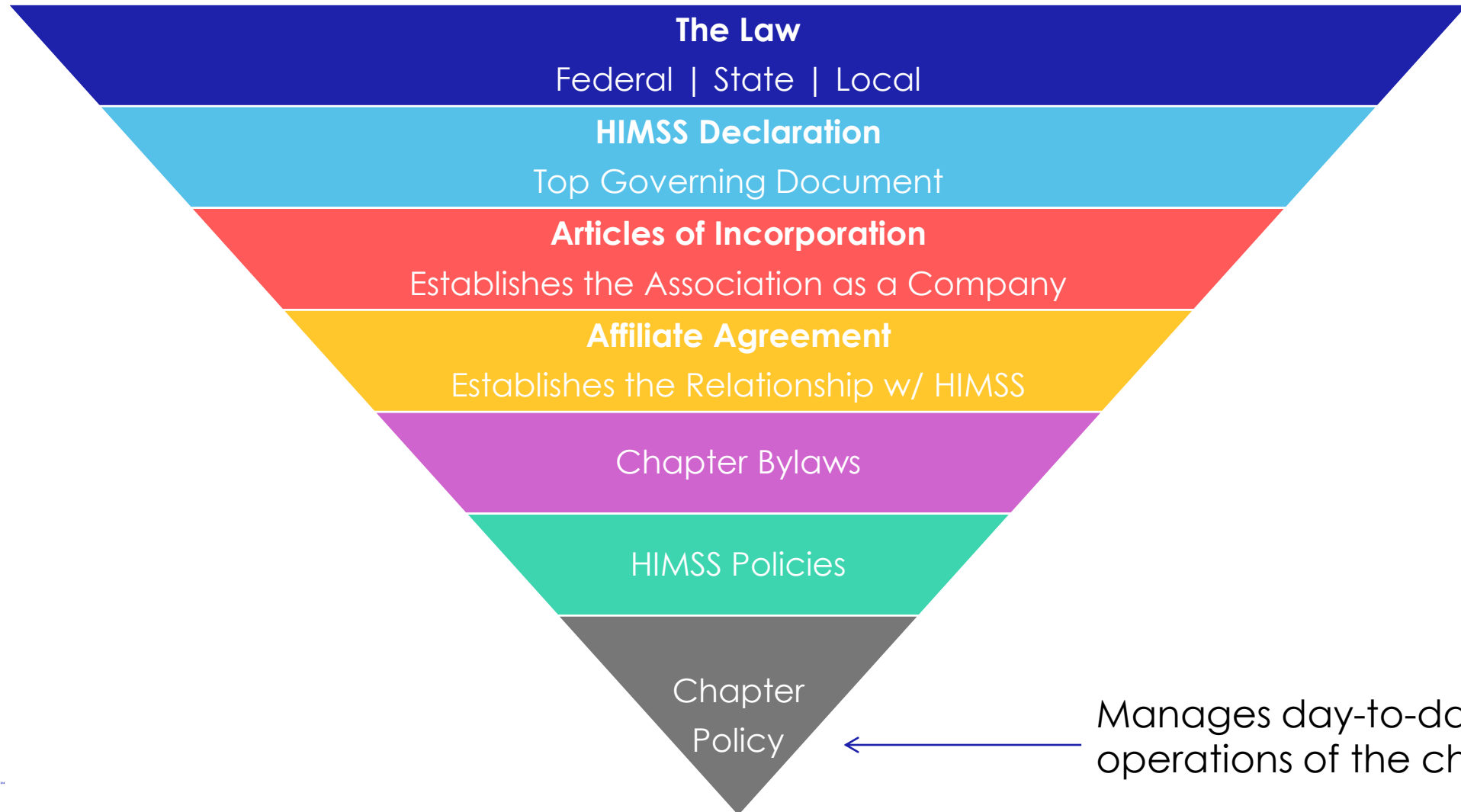
## Email updates

- Sent from [chapters@himss.org](mailto:chapters@himss.org)
- General questions can be sent to [chapters@himss.org](mailto:chapters@himss.org)
- Remind board members to update email on member profile

## Group emails

- One group list can be created per chapter to simplify board communications
  - [Location.board@himsschapter.org](mailto:Location.board@himsschapter.org)
- Added based on submitted board list to encourage collaboration and best practice sharing
  - [chapter.presidents@himsschapter.org](mailto:chapter.presidents@himsschapter.org) – all Presidents and President-Elects
  - [Location.RegionPresidents@himsschapter.org](mailto:Location.RegionPresidents@himsschapter.org) – all Presidents within a specific region

# Hierarchy of Governance



# Chapter Governance



## Incorporation

- US chapters incorporated in IL as 501 (c)6 (membership org, not charitable org)



## Affiliate Agreement

- Defines relationship between HIMSS and the chapter



## Bylaws

- Guide to the structure of the chapter, including governance, purpose, duties of members, and key high-level operational policies



## Policies and procedures

- HIMSS governed and enforced manual

# *Affiliate Agreement Responsibilities*

- **Chapter**
  - Operations
  - Receive approval from HIMSS to modify the Standardized Bylaws
  - Remain in good standing for all state and local laws; maintain tax-exempt status
  - Submit annual reporting, copies of meeting minutes, and other legal documentation as requested
- **HIMSS**
  - Governance
  - Amendments to chapter territory
  - Membership processing, dues collection, leadership development
  - Provide Directors' and Officers' insurance and maintain a registered agent in IL

# *Standardized Chapter Bylaws*

## Action Steps for Changes



**Chapter board discuss proposed changes within flexible options of standardized bylaws**



**Return redlined version to HIMSS Chapter Manager for review/approval**



**Send out to full chapter membership for a vote**



**HIMSS will officially approve, and new bylaws will be active**

# Standardized Chapter Bylaws

## Flexible Portions

### Composition (Board of Directors)

- # of Members-at-Large and which Committee Chairs
- *Recommendation: at least 2 Members-at-Large and 2 Chairs*

### Term (Board of Directors and Officers)

- Term length and # of consecutive terms
- *Recommendation: 1-year terms, serving no more than 4 consecutive terms*

### Elections (Board of Directors)

- The voting members shall elect the Officers (select option)
  1. and Directors.
  2. and the Board of Directors shall elect the At-Large and Committee Chairs directors.

# *HIMSS Chapter Governance and Policy Manual*

Policies and procedures provide a strong foundation for your chapter to follow as a part of the HIMSS organization and are imperative to ensuring the success of your chapter.

- **Within Manual**

- Governance
- Financial
- Programming
- Marketing
- Membership
- Formation

- **Standalone**

- Collaborations
- Conflict of Interest
- Records Retention
- Business Conduct

# *Individual Chapter Policy Best Practices*



**REVIEW ANNUALLY**



**WRITE ALL POLICIES, PROCEDURES, AND  
BEST PRACTICES IN OFFICIAL  
DOCUMENTATION THAT IS STORED IN A  
SHARED LOCATION**

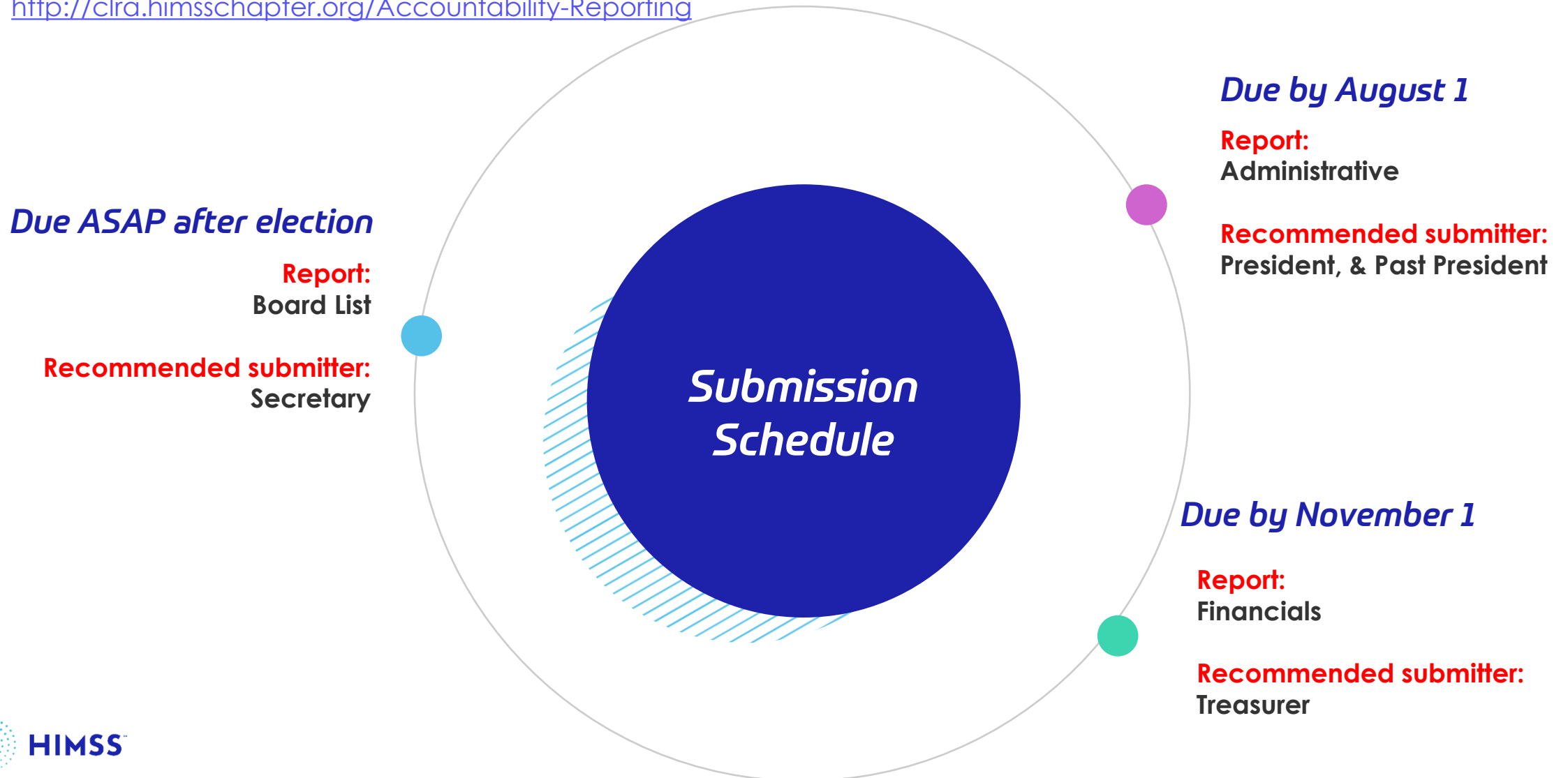


**BOARD OF DIRECTORS VOTE TO MAKE  
CHANGES**



# Accountability Reporting Timeline

<http://clra.himsschapter.org/Accountability-Reporting>



# *Event Support & Collaboration Requests*

## **Three reasons, one easy form**

Link to form:

<https://clra.himsschapter.org/policies-and-procedures>



### ***Collaboration***

Collaborate with like-minded organizations to broaden your reach. HIMSS NPP are automatically approved.



### ***Speaker***

We can help support your events through SME speakers in the industry and HIMSS staff.



### ***Financial***

Chapters in good standing may apply for funds to support great events and speakers. Limited funds are available.

# Logos and templates

- **Logo suite**
  - Blue and white options
  - Do not create your own logos
- **Templates**
  - PPT, Word
  - Flyer, Event, Certificate
  - Email signature badge
- **Need something else?**
  - Your chapter manager can help!



## *Logo usage*

**Do not use any material with this logo →**

*Please recycle all material that includes this logo.*

**This logo is approved with your chapter name included →**

*Do not use the HIMSS logo without the chapter name included.*

**The symbol is only approved for chapter use on HIMSS created content. Chapters should not embed the symbol within their own designs.**



**HIMSS**



# Certification

Chapters are pre-approved continuing education providers

- **CPHIMS™**
  - For professionals with proven industry expertise
- **CPHIMS-CA™**
  - For professionals with proven experience
  - Candidates take both the CPHIMS exam and the Canadian Supplemental Exam
- **CAHIMS™**
  - For professionals with less than 5 years of experience

CPHIMS

CPHIMS-CA

CAHIMS

# Chapter Advocacy

- The [Chapter Advocacy Task Force](#) (CATF) informs, empowers, and mobilizes chapter leaders to advocate for public policy and educate policymakers at the state, provincial, and local levels. HIMSS welcomes all chapter leaders, regardless of role, to participate.
- HIMSS's key public policy priorities: Interoperability, Connected Health, Cybersecurity & Privacy, Value-Based Care

## How can chapters advocate and work with government? To name a few...

- Hold an Advocacy Day and allow your members to meet with their legislators
- Invite government officials, staff, and partners to chapter events
- Educate membership on advocacy priorities
- Recognize a government official for their contributions

Contact [policy@himss.org](mailto:policy@himss.org) with any questions.

# Best Practices To Engage Chapter Members

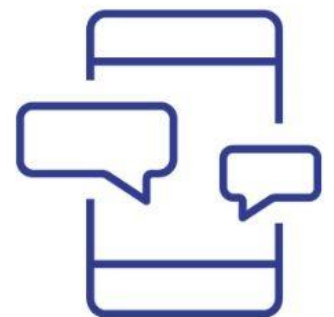
OFFER OUTSTANDING VALUE TO MEMBERS THROUGH EVENTS, EDUCATION, INNOVATIVE INITIATIVES, AND COLLABORATION WITH HIMSS CHAPTERS AND LIKE-MINDED ORGANIZATIONS.

1



2

UTILIZE GLOBAL HEALTHY EQUITY WEEK AND GLOBAL HEALTH CONFERENCE MARKETING TOOLKIT TO PROMOTE ENGAGEMENT OF GLOBAL HIMSS INITIATIVES.



3

REGULARLY ENGAGE WITH MEMBERS THROUGH EMAIL AND SOCIAL MEDIA CHANNELS.



4

REGULARLY ENGAGE IN MEMBER RECRUITMENT AND RETENTION EFFORTS.

OUTREACH TO STUDENTS THROUGH MENTORSHIP, SCHOLARSHIP, OR OTHER ENGAGEMENT OPPORTUNITIES.

5



>20% OF VOLUNTEERS SHOULD BE NEW  
>5% OF MEMBERSHIP IS VOLUNTEERING IN SOME CAPACITY  
>15% OF MEMBERSHIP ATTENDS EVENTS  
BOARD IS INCLUSIVE AND REPRESENTS OVERALL MEMBERSHIP

# Q & A



***Thank you!***  
***We appreciate you.***

# *Save the Date*

- **July 20, 2023 | Create an Aligned and Engaged Board | Virtual Webinar**
- **October 23-27, 2023 | Global Health Equity Week | Virtual Event**
- **March 11-15, 2024 | HIMSS24 | Orlando, FL**

# CHAPTER REQUIREMENTS

## REPORTING COMPONENTS BY EACH DEADLINE

- BOARD LIST - JULY 1
- ADMINISTRATIVE REPORT - AUGUST 1
- FINANCIAL REPORT - NOVEMBER 1



OFFER TWELVE EDUCATION HOURS



DISTRIBUTE FOUR COMMUNICATIONS



HOLD FOUR BOARD MEETINGS



ATTEND EDUCATION/NETWORKING OFFERINGS



MEET ALL EXPECTATIONS ESTABLISHED THROUGH THE HIMSS BYLAWS, AFFILIATE AGREEMENT, AND POLICY MANUAL

FOLLOW LOCAL AND FEDERAL REQUIREMENTS TO REMAIN IN GOOD STANDING AND MAINTAIN THE ORGANIZATION FOR A SUSTAINABLE FUTURE



# *Open Discussion & Sharing*

- Before sharing, please state your name, role, and chapter
- Suggested conversation starters:
  - What does your chapter do well?
  - Where are areas you know your chapter can improve?
  - What are your challenges?
  - Share an example of when.... (Something worked well; something did not work)
  - What policies do you have in place?
  - What plans does your chapter have for this year? Next year?
  - What feedback have you received from members?
  - Have you tried... [insert HIMSS best practice]?
  - Share innovative or new ideas

