



# ASHE Chapter Handbook

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## **American Society for Healthcare Engineering**

ASHE: Dedicated to optimizing the healthcare physical environment.

For more than 50 years, the American Society for Healthcare Engineering (ASHE), a personal membership group of the American Hospital Association (AHA), has been the advocate and resource for continuous improvement in health care engineering and facility management. ASHE represents a diverse network of dedicated health care professionals who are committed to optimizing the health care physical environment.

### **ASHE's Strategic Initiatives at a Glance**

ASHE's initiatives focus on creating and optimizing safe and effective patient care environments, preserving financial resources through optimal maintenance practices, complying with codes and standards, regulation without compliance, and efficient use of energy.

### **About ASHE**

ASHE delivers the latest [information](#) on a wide range of issues related to the facility management profession including but not limited to the planning, design, construction, and operation of the health care built environment. ASHE offers effective and innovative health care engineering strategies and professional leadership through education, advocacy, publications, networking, and interactions with leading health care organizations, government agencies, and accreditation bodies.

### **The ASHE Network**

Over the past several years ASHE has realized significant growth. With more than 12,000 members, ASHE is a community composed of experienced professionals from a wide variety of fields and interests that shape and influence the health care physical environment and affect patient care. The fields ASHE represents include the following:

- Facility management
- Engineering
- Clinical engineering
- Medical equipment management
- Health care design and construction
- Safety and security management

### **ASHE Offers**

ASHE continuously provides its members with the most current health care news and trends in the health care built environment. ASHE hosts two conferences annually and 20 to 30 seminars each year to bring members the most current thinking and best practices in areas including architectural design, construction practices, environmental infection control, environment of care management, and advanced leadership skills.

ASHE is committed to helping members enhance their professional portfolios, expand their expertise, and reach their full potential through a variety of educational, career development, and [professional credentialing](#) opportunities.

ASHE produces management monographs, books, and interactive tools to support professional growth and provides substantial online technical resources, networking opportunities with peers and leaders in the health care field, and invaluable information through its publications, education, and advocacy programs.

With more than 12,000 members, ASHE is the largest association devoted to optimizing the planning, design, construction, and operations of a health care organization's physical facilities. As a trusted industry resource, ASHE is committed to advancing the knowledge and leadership of our members as they build and maintain health care facilities, support project teams and facility management staff, and serve patients. ASHE develops valuable resources and education programs that respond to member needs, provides a unified voice for the industry through intensive advocacy efforts, provides expert consultation and advice, and [certifies](#) health care facility managers and constructors.

### **ASHE [Mission](#)**

Dedicated to optimizing the health care physical environment.

### **ASHE [Vision](#)**

To engage stakeholders in the creation of health care environments that are optimal for healing.

### **ASHE Purpose**

To advance our members' ability to design, build, operate, and maintain a physical environment that supports excellent care, quality service, safe and effective work, and financial success.

### **ASHE Core Values**

ASHE is committed to demonstrating these core values as we strive to achieve the goals set forth in our strategic plan:

- **Integrity**—demonstrated by uncompromised dedication to being a trusted, unbiased, and honest source of fact-based information and expertise.
- **Innovation**—demonstrated by continuing commitment to achieving the best of what is possible and serving as a lighthouse for evolving knowledge and practices.
- **Fellowship**—demonstrated by professional and personal pride in being part of a community of excellence with a common passion for good thinking, shared experience, and collective action.
- **Stewardship**—demonstrated by our profession's acceptance of responsibility for success of the built environment and our leadership's accountability for effective use of our members' involvement in ASHE.

## ASHE Strategic Goals

Guided by our mission and vision statements, ASHE leaders developed three [strategic goals](#) for the organization. These goals are keenly focused on the regulatory environment, the reputation of our members, and the capacity in which ASHE serves those members:

- **Regulation**—our members will work in a regulatory environment characterized by good science, defensible economics, informed policy-making, and clear decision authority.
- **Reputation**—Our members will have a reputation as highly valued professionals with a specialized body of knowledge, experience, and competency that contributes strategic, operational, and business value to the entire enterprise.
- **Capacity**—Our members will be supported by a nimble association with the resources, relationships, decision systems, and work processes necessary to achieve their envisioned future for the field.

## ASHE Strategic Imperatives

While strategic goals provide long-term targets for ASHE, [strategic imperatives](#) are short-term initiatives to help realize ASHE strategic goals.

- **Succession Planning**—there is a growing succession planning for health care facility management and for planning, design, and construction teams. Now more than ever, there is an immediate need for dedicated professionals to build and optimize health care facilities for the future.
- **Unified Code**—while regulations are a critical part of keeping patients, staff, and visitors safe, current codes and standards leave much room for improvement. ASHE is working to improve outdated codes, conflicting codes, codes not based on science, and inappropriate code interpretations.
- **Commissioning**—commissioning provides an opportunity for health care organizations to achieve a significant return on investment in facilities and equipment. ASHE's process to health facility commissioning will help optimize the physical health care environment.

ASHE is composed of 10 Regions. Each Region elects a Regional Director for a two-year term. The Regional Directors make up the [ASHE Board of Directors](#), which also includes a President, President-Elect, and Immediate Past President. The Executive Director acts as Secretary and Ex-Officio member of the Board. The [ASHE Bylaws](#) further delineate how the organization is structured.

## Chapter 2

### **THE ASHE/CHAPTER RELATIONSHIP**

*This chapter addresses the following topics:*

- ASHE Chapter Affiliation
- What ASHE Can Expect from Affiliated Chapters
- What Affiliated Chapters Can Expect from ASHE



## **ASHE CHAPTER AFFILIATION**

As with any partnership, the terms of the relationship between ASHE and its [chapters](#) should be clear. [Affiliation](#) is a means by which to work toward a common mission. ASHE has established guidelines and expectations to ensure that affiliated chapters:

- Provide valuable links between health care professionals in close geographic proximity or with similar interests.
- Serve as a conduit by enhancing grass-roots communication and providing members with an opportunity to develop professionally and expand their industry experience and expertise.
- Provide a unified voice on issues that affect the profession relating to codes, standards, regulations, and other advocacy issues.

### **Affiliation Vision Statement**

Partnerships must benefit each organization involved. Affiliated chapters should:

- Provide an organized structure at the local and/or state level for members of the society and others in the field of health care facility management/engineering.
- Enable members to work together on problems of common interest, such as advocacy issues.
- Help facility managers/engineers meet current and future health care challenges.
- Enhance the channels of communication between ASHE and its members.
- Expand the body of knowledge in areas related to the environment of care in health care facilities, including, but not limited to, facility management; engineering; clinical and biomedical engineering; technology management; planning, design, and construction; and safety and security management.
- Promote the purposes of and membership in ASHE.

### **Requirements for Affiliation**

To become an [affiliated chapter](#), the formal group must submit the following forms and documentation to ASHE:

1. Letter of application
2. A completed Affiliation Agreement
3. An approved set of bylaws for the chapter
4. List of chapter officers
5. Petition of interested professionals/members committed to participate/join the chapter

In addition, your chapter must meet the criteria listed in Article XI, Sections 3 and 4 of the ASHE Bylaws, and this must be stated and affirmed in the application letter. This article reads as follows:

### **Article XI—Affiliated Chapters**

#### *Section 3. Requirement for Affiliation*

*At the time of affiliation, the affiliating group is strongly encouraged to have at least 25% of its members in common with the Society. The affiliating chapter should have a program in place promoting increased membership in the Society so that the members in common continue to be a majority. (See [Chapter Agreement](#), Exhibit B, Criteria for Chapter Status.*

*After being granted affiliation, the affiliated group shall continue to demonstrate that their interests are in the fields of healthcare facility management and engineering, that they continue to operate under applicable bylaws, and that their governing Board of Directors actively supports the Society's goals. Further, it is strongly advised that the affiliated chapter President, President-Elect, and Vice President be members of the Society.*

#### *Section 4. Affiliated Chapter as a Distinct Legal Entity*

*Any state or local chapter affiliated with the Society under this article is not an extension or part of the Society or the Association but rather a distinct legal entity; any such affiliated chapter is, therefore, responsible for maintaining its own financial records, filing appropriate notices and forms with state and federal income tax authorities, maintaining necessary insurance coverage, and so forth.*

### **Notice of Affiliation**

When affiliation has been approved, the chapter president will be notified. An announcement of affiliation will also be printed in the official member publication, *InsideASHE*, and the chapter will be listed on the ASHE website.

### **Termination of Affiliation**

The process of affiliation does not end with the signing of an affiliation agreement. Problems and/or issues may arise that do not have a mutually satisfactory solution. In such cases, affiliation may be terminated. ASHE may revoke an affiliation for the following reasons: (See [Chapter Agreement](#), Paragraph 8, *Termination of Chapter Status*.)

1. Failure to satisfy obligations outlined in the Affiliation Agreement
2. Failure to observe the limitations on chapters set forth in ASHE's bylaws or the chapter's bylaws
3. Changes in chapter bylaws that bring the chapter into conflict with the national association
4. Fiscal impropriety
5. Loss of a critical mass of ASHE members

Revocation is always for cause and may be in the best interest of the association. Provisions for revocation tend to be broadly stated, allowing discretion to the national association. In practice, revocation of a Chapter Affiliation Agreement is serious business, and should rarely occur.

The members of a chapter may themselves request termination of the affiliation. The chapter is expected to give ninety (90) days' notice signed by the chapter officers. (See [Chapter Agreement](#), Paragraph 8, *Termination of Chapter Status*.)

The ASHE Board of Directors will hear revocation appeals, and their decision will be final.

## **WHAT ASHE CAN EXPECT FROM AFFILIATED CHAPTERS**

### **Coordinating with ASHE**

To meet your obligations to ASHE and benefit from your chapter's affiliation, awareness of important deadlines.

## Communicating with ASHE

So that ASHE can provide the highest level of service to its members and to the health care profession, maintain regular contact with your Regional Director:

- **Chapter officer listing**--ASHE maintains your officer and chapter contact information as a resource for inquires and referrals. If your chapter officers or chapter address change, contact ASHE Headquarters or complete a *Chapter Officer Update Form*.
- **Chapter annual report**--To help keep ASHE records up to date, each chapter should prepare and send a *Chapter Annual Report Form*, along with a current list of chapter members, in an electronic format.
- **Meeting announcements**--To promote awareness of upcoming local programs and meetings, please send your schedule of meetings to ASHE Headquarters.
- **Advocacy issues**--Periodically, ASHE asks chapters to provide important input on national [advocacy issues](#). Your assistance in communicating these issues to your chapter, and directing feedback, examples, experiences, etc., to ASHE as necessary, is greatly appreciated.

## Recruiting ASHE Members

Word of Mouth is often the most effective recruitment tool available to ASHE, and chapters play a big role in this strategy. Here are some options to help you recruit:

- **Annual Complimentary Mailing List**--ASHE will provide to your chapter upon request one complimentary list of ASHE members residing or employed in your regional/chapter/state area. To request your list, send written notification to ASHE Headquarters. Please allow 5 to 7 days for processing
- **Link your website to [www.ashe.org](http://www.ashe.org)**--This simple, no-cost effort can add value to your chapter's website and shows your affiliation with ASHE.
- **Promote ASHE in communications to members**--Does your chapter send a newsletter to members by mail or e-mail? ASHE can assist you with articles and information on ASHE for your newsletter.
- **ASHE materials at chapter meetings**--ASHE Headquarters can provide ASHE promotional materials for distribution at your chapter meeting. Simply fax or e-mail your [request](#) at least thirty (30) days before your meeting, and be sure to include contact information, quantity needed, and shipping instructions.
- **Ask your members if they belong to ASHE**--Several chapters track ASHE membership in their member database. Ask for this information on your membership application, and you'll discover some good prospects for ASHE membership.

## Chapter Leadership Forum

Each year ASHE hosts a Leadership Forum in conjunction with the ASHE Annual Conference, usually held in July or August. While chapter officers are not required to attend this program, it is an excellent opportunity for you to network and share ideas with other chapter officers in an effort to revitalize your chapter. To meet the criteria for the ASHE Chapter Levels of Affiliation awards program, chapters that use a Complimentary Annual Conference Waiver are required to attend the Chapter Leadership Forum.

## Certified Healthcare Facility Manager (CHFM) and Certified Healthcare Constructor (CHC) Programs

For chapter members who are interested in earning the CHFM and CHC certifications from the American Hospital Association (AHA) Certification Center, a [Candidate Handbook and Application](#) may be obtained at the ASHE website. Tests are offered at more than 100 assessment centers across the country. A complete list is available at [Applied Measurement Professionals, \(AMP\)](#).

You can help chapter members prepare for the exam by:

- Regularly distributing CHFMs Candidate Handbooks at chapter meetings
- Forming a support group
- Conducting refresher courses for your members
- Building a library of study materials for member use
- Reviewing the Content Outline listed in the CHFMs Candidate Handbook

If you need have specific questions concerning the CHFMs certification, testing, renewal, or eligibility requirements, contact Kimberly Wright at 312-422-3711 or [kwright@aha.org](mailto:kwright@aha.org).

## **WHAT AFFILIATED CHAPTERS CAN EXPECT FROM ASHE**

Just as ASHE has expectations of its chapters, ASHE chapters have certain expectations of the relationship, including the following advantages of affiliation:

- Use of information and models provided by ASHE to organize effectively on a local, state, or a regional basis
- Collaboration to resolve issues of common interest, such as clarifications on codes and standards
- Enhanced body of knowledge in areas related to the environment of health care facilities, including, but not limited to, facility management, engineering, clinical and biomedical engineering, technology management, and safety and security management.
- Access to ASHE resources to develop leadership skills in the fields related to the environment of care
- Serving as a resource, through ASHE, to related health care organizations
- Enhancing channels of communication between ASHE and state and local groups.

### **Working with ASHE Regional Directors**

Your ASHE Regional Director is a key liaison between your chapter and ASHE. Keep in regular contact with them and put them on your mailing list. In addition, invite your ASHE Regional Director to chapter and board meetings. They may not be able to attend every meeting, but they should be invited nonetheless. [ASHE Regional Directors](#) are required to visit each chapter in their Region at least once every two years.

### **Membership Lists**

If your chapter is trying to build membership, ASHE can help by providing, upon request, a list of ASHE members in your state or area of operation. ASHE membership lists may not be used, however, for electioneering purposes, and must be used only for the benefit of the chapter. Each chapter is allowed one complimentary list annually.

### **Chapter Connections E-Newsletter**

This [newsletter](#) is sent quarterly to chapter officers (and other key contacts) who have provided their e-mail address to ASHE. It includes important dates/deadlines that affect you as a chapter officer, chapter opportunities to be involved in advocacy issues, suggestions and information you may want to communicate to chapter members, and useful information that can be used to grow your chapter. This is a newsletter for chapter officers, so you should take the time to read the information and distribute it to other key officers in your chapter so that it is communicated to your membership. The newsletter is also designed to help you grow as a chapter officer, so ASHE welcomes your input, comments, and suggestions on how to expand the usefulness of this communication tool as a resource and guide to helping you achieve your goals and objectives.

## Meeting Promotion

Several mechanisms exist for promoting chapter meetings to ASHE members. These include:

- **Regional newsletter**--ASHE Regional Directors send out a quarterly newsletter to all ASHE members in their region. If you provide the information in advance, your meeting can be promoted in this newsletter.
- **Member communications**--If you would like to promote your chapter meeting in ASHE member publications (*Inside ASHE* or [ASHE e-News](#)), send your meeting dates to [ashe@aha.org](mailto:ashe@aha.org). Contact ASHE Headquarters for submission deadlines.
- **Chapter calendar**--If you would like to have your meeting listed in this comprehensive [calendar](#) of all upcoming chapter meetings, send meeting dates and details to [ashe@aha.org](mailto:ashe@aha.org).

## Emerging Advocacy Issues

Many national issues actually start at the local or state level. Periodically, ASHE asks chapters to provide input on national [advocacy issues](#). Your assistance in communicating these issues to your chapter and directing feedback to ASHE as necessary is greatly appreciated. To talk with someone at ASHE about an issue in your area, call 312-422-3800 or send your e-mail to [ashe@aha.org](mailto:ashe@aha.org).

## Keeping up with Chapter Needs

To help ASHE keep in touch with the issues, needs, and concerns of both member and chapters, you can contact your [Regional Director](#). You can also contact ASHE Headquarters to reach a team of professionals who can help you resolve your issues, needs, and concerns and a staff person who acts as a liaison between ASHE and the affiliate chapters and is responsible for chapter administration and operations. If you need assistance on a chapter issue contact:

Avis Gordon  
Senior Specialist, Chapter Relations  
312-422-3806  
[agordon@aha.org](mailto:agordon@aha.org)

## Chapter 3

### CHAPTER MANAGEMENT

*This chapter addresses the following topics:*

- Overview
- Managing Chapter Logistics
- Bylaws
- Budget Basics for Chapters
- Membership Applications
- Running Business Meetings
- Planning for Success
- Defining Leadership Roles
- The Vital Role of Committees
- Parliamentary Procedure

## **OVERVIEW**

Like most good things in life, an effective chapter isn't an accident. It takes hard work, careful planning, and a group of leaders committed to success. That said, there are ways to make the process a little easier and the outcome a bit more predictable.

The local nature of your organization positions your chapter to be most effective in the delivery of education—education that focuses on local problems and local solutions, presented by local speakers who are top in the field.

The chapter is also in a strong position to understand the needs and wants of members. After all, many of the codes and regulations that shape the way ASHE members operate are created at the city, county, and state level. Who better than the chapter to understand the implications of such codes for members?

Research indicates that one of the biggest reasons members join a chapter is the value of the network—the formal and informal exchange of ideas and information that are key to the ASHE experience. Chapters that effectively encourage such a network—through educational programming, publications, and social interaction—will be far stronger than chapters that view such activities as non-productive.

## **MANAGING CHAPTER LOGISTICS**

### **What's the Right Size?**

The size of your organization is best driven by two key factors:

1. How far away members can live and work and still actively participate in chapter activities
2. The point at which the number of members makes it impossible to maintain a certain intimacy among the group.

Recognize that there are no right or wrong answers to these issues, but keep them in mind as you work to manage and strengthen the chapter. If you've got 150 on your mailing list, but only 25 are ever active, all the work falls on far too few volunteers.

### **When Should You Meet?**

This is another question that only you can answer. You will find the right answer with your members. In some groups, a breakfast meeting works best, while others prefer lunch or dinner sessions. Some have speakers, others only provide networking time. There are probably as many variations of what works as there are ASHE chapters. Poll your current members about their preferences.

When deciding when to hold your chapter meeting, be consistent. It's best to schedule the meeting at the same day and time every month (e.g., noon the first Wednesday, 7:00 p.m. the last Thursday, 10:00 a.m. the second Tuesday). Once you have a set day and time, stick with it. The regularity makes remembering and scheduling the meeting easier for your members, which means they are more likely to attend.

Another idea to consider is rotating the schedule to accommodate members with different time availabilities. If you always hold luncheons, try a dinner once or twice a year. Given the complicated nature of your members' jobs it's increasingly difficult for many people to get away from work, so scheduling a few evening events may help keep members involved.

It may take some time to determine what works best for your chapter. Every chapter is different. The decision to meet monthly or bi-monthly is evenly split among ASHE chapters. Whatever works best for your members is the model you should adopt.

## BYLAWS

ASHE and AHA require affiliated chapters to create and follow bylaws. More important, bylaws are the glue that holds your chapter's structure together. Bylaws are legal documents that summarize the chapter's decisions before problems arise and explain how the chapter intends to deal with them. They document objectives, structures, and programs. However, the language of your bylaws should be your own.

The format for preparing bylaws is fairly simple. Like a report outline, bylaws should be separated into articles (which address a broad area, such as the board of directors) and sections (which detail specifics about how the articles will be administered).

Here's an example of how bylaws can be organized:

Article I, Section 1:  
Chapter Name

Article I, Section 2:  
Mission, purpose, and objectives

Article II  
Membership including in subsequent sections criteria and eligibility

You also need to include articles and sections that cover the following:

- Dues
- Meetings (annual, special meetings, notice of meetings, order of meetings, voting, quorum)
- Board of directors (including eligibility, composition, election and terms of office, forfeiture of and removal from office, powers, vacancies, and meetings)
- Officers (eligibility, offices, election and term, forfeiture of and removal from office, duties, reports, and vacancies)
- Conflict of interest of directors and officers
- Committees
- Amendments

Bylaws shouldn't become doctrine, but they should be referred to whenever and wherever questions of proper operations and process arise. As noted, they are designed to address potential problems before they arise, so that decisions can be made dispassionately.

Bylaws should be reviewed every two years so to ensure that they reflect changes that may affect the way your chapter operates as well as industry changes that may affect the makeup and potential growth of your chapter.

## BUDGET BASICS FOR CHAPTERS

If your chapter holds meetings, collects dues, and conduces educational programs, your chapter should have some sort of guideline for operating the chapter and managing funds. Your chapter shall establish a bank account and have all of your officers, especially anyone with the authority to sign checks, bonded and indemnified. That means if the financial officer splits for Bermuda with the bucks, the chapter won't end up out of business.

Whether you choose a cash or accrual system of accounting, certain rules of thumb apply to not-for-profit associations. The chapter is required to be a 501(c)3 or apply for a 501(c)6 tax-exempt status. (*See [chapter toolkit](#).*) That means certain parts of your chapter's income—dues, educational revenue, and income directly related to your purpose—are likely to be tax-exempt. But other income you produce—termed unrelated business



income—is subject to taxation. ASHE can help you clarify specific questions, but generally revenue from such programs as advertising sales, insurance programs, (See [chapter toolkit](#).) and booth rentals from trade shows is categorized as unrelated business income and, as such, is subject to taxation.

Chapters can maintain more money in their accounts—either in cash or investments—than it costs them to operate each year, but regulations limit how much surplus is acceptable. The Internal Revenue Service tends to view more than 6 to 12 months of operating expenses as excessive, and they view anything excessive as fair game.

If you don't have people in your chapter who are comfortable handling money, balancing books, or dispersing funds, consider hiring a small certified public accountant (CPA) firm or local bookkeeper to maintain the books for you. That doesn't relieve the chapter officers of their fiduciary responsibility to ensure sound fiscal practices, but it does ensure your checks won't bounce.

## **Annual Budgeting**

A typical chapter budget statement might cover the following areas:

### **Revenues**

- Dues
- Meeting registrations
- Create a spreadsheet
- Exhibit booth sales
- Publication sales
- Advertising revenues
  - Total revenues

### **Month**

### **Year to Date**

### **Expenses**

- Administrative (accountants, lawyers)
- Postage
- Newsletter printing
- Telephone
- Supplies
- Liability insurance
- Meeting room rental
- Meal costs
  - Total expenses
- Excess of revenues over expenses

Financial statements, including a treasurer's report and balance sheet, should be prepared and reviewed at each board meeting and at the general membership meeting. The association president should review these reports in detail with the association treasurer. Reports should provide a monthly or quarterly accounting of the association's revenues and expenses.

The association should have an independent CPA complete an annual audit of the association's finances. Financial statements and association books should be made available to the CPA for this audit.

## **D&O Insurance**

Directors and Officers ([D&O Insurance](#)) extends protection against legal claims for wrongful acts to the directors and officers of an organization in the course of performing their duties.

Wrongful acts include omissions, errors, neglect, and breach of duty, among other things. Policy beneficiaries are directors, officers, or the entity itself. Parties who might sue include employees, suppliers, competitors, or creditors; directors and officers can be personally liable for damages. Three levels of coverage are available:

- **A-side coverage:** directly covers directors and officers
- **B-side coverage:** indirectly covers directors and officers by covering claims paid by the entity on their behalf
- **C-side coverage:** covers entity for claims arising from claims not covered by general liability policies

D&O policies cover claims made during the policy period. It doesn't matter when the wrongful acts occurred. A claim filed in the current year will be covered by the current policy, even if the wrongful act happened in the past.

Some organizations augment D&O policies with employment practices liability (EPL) coverage, which safeguards against claims for wrongful dismissal, sexual harassment, and other violations of employment or anti-discrimination laws. EPL coverage can be purchased as part of a D&O or general liability policy or as a stand-alone policy.

ASHE and AHA requires all chapters to have D&O insurance. Chapters may find that some volunteers are reluctant to serve as directors or officers without protection from lawsuits. Chapters may secure D&O insurance by contacting a local broker for information on rates and specific coverage options.

## **MEMBERSHIP APPLICATIONS**

Every chapter needs its own version of a membership application, and the more information the form includes, the better. Obtaining a sound demographic profile of your members as they join and updating it regularly will give you a better idea of the types of products and services that will have the greatest appeal.

If you ask age, gender, or race questions, they **MUST** be noted as optional on the application, and you should indicate that you are requesting the information to maintain a demographic profile of members. Due to identity theft issues, it's not a good idea to request a person's date of birth, social security number, or driver's license number.

The application form becomes a permanent record of information about your membership base and helps determine which category of membership a prospective member best fits—or whether they qualify to be a member. If you have different categories of membership, make sure you spell them out on the application form along with the specific requirements for each category and the benefits and services associated with each.

## **RUNNING BUSINESS MEETINGS**

Every chapter has business information it needs to communicate to members. The report should focus on major actions. The members of your chapter may not be interested in every nuance of every decision the board has made. After all, that's why they elected you. But they are interested in the important issues affecting the industry and the chapter, actions taken by the committee or the board, and the financial health of the organization.

## PLANNING FOR SUCCESS

As noted in the introduction, successful chapters require planning—both on the business side and the operating side. What exactly does that mean?

A business plan designs the financial outlook for the organization—where the money will come from, now and in the future. It considers new markets, new opportunities, where potential members may be found, where other sources of revenue might be identified, and how those sources will be tapped. It is not the same thing as a marketing plan, although a marketing plan may be a component. The business plan examines in what directions the chapter can grow and how to support that growth. This is the closest thing to a strategic plan most chapters will have.

You may choose to begin the planning process by looking at ASHE's [strategic plan](#) and determine what aspects are particularly relevant to your chapter. This will allow you to align your direction with that of the national organization and strengthen both groups simultaneously. Other chapters may be willing to share their plans with you as well.

The operating plan, on the other hand, looks at how the chapter will function over the coming year. If you do nothing else, use the budget as a kind of operating plan, identifying the major areas of work to be undertaken in the coming year, how much you will spend to accomplish them, and how much revenue you expect to have left at the end of the year. Developing such plans creates clear expectations for the program of work ahead and eliminates any surprises for members or board members in terms of expected expenses and revenues.

## DEFINING LEADERSHIP ROLES

An organization's effectiveness is determined in large part by the quality of its leadership. While this handbook contains a section on leadership, its focus is on leadership skills rather than the structure of chapter leadership. A chapter should have a progression of chairs or positions through which leaders proceed as they move up within the organization. This series of steps, which can be informal rather than formalized in your bylaws, serves as a training ground for future commitment. In this way, a new chapter president, having served as treasurer and program chair and president-elect, knows how important each position is and what responsibilities need to be undertaken.

A typical set of officers for an ASHE chapter might include:

- President
- President-Elect
- Vice President
- Immediate Past President
- Secretary
- Secretary/Treasurer
- Education/Conference Chair
- PR/Marketing Chair
- Membership Chair
- Awards/Recognition Chair
- District President
- State/District Representative
- Paid Staff/Chapter Administrator
- ASHE Chapter Liaison
- Advocacy Liaison
- Sustainability Liaison

The term of a leadership position within an ASHE chapter will vary from group to group, but a minimum of two to four years is realistic.

### Typical Responsibilities

The advantage of writing job descriptions for each voluntary leader is great. It clearly defines who is responsible for what and eliminates duplication of effort—something that is simply unacceptable in today's environment where leadership time is limited. While job descriptions will vary widely from chapter to chapter, following are some of the responsibilities to consider including for key leaders' roles:

### **Chapter President**

The chapter president is charged with the general management of the chapter. They are responsible for seeing that all orders and resolutions from the chapter Board of Directors are put into effect.

Duties typically include (but are not limited to):

1. Presiding over all meetings of the general membership and Board of Directors
2. Appointing all committee chairs
3. Acting as liaison to the regional and national organizations
4. Ensuring that the chapter abides by its bylaws in all operations
5. Working in partnership with the Board, scheduling regular chapter meetings and Board meetings
6. Making sure that the application for the ASHE Levels of Affiliation [Chapter Awards](#) Program is prepared and submitted each year along with other required submissions

### **Chapter Secretary**

The Secretary is charged with keeping all records of the chapter (other than financial) as well as mailing lists. Specific duties typically include:

1. Keeping accurate minutes of all chapter meetings, including those of the Board and major committees
2. Keeping up-to-date membership lists and distributing advance meeting notices
3. Keeping mailing list of potential members in concert with the membership vice president
4. Producing chapter letterhead and roster of officers and committee chairs
5. Preparing and submitting the Chapter Annual Report to ASHE by January 1 of each year, along with a copy of the chapter's membership list

### **Chapter Treasurer**

The Treasurer is responsible for keeping chapter funds and records of all financial transactions.

Typical other duties include:

1. Collecting all chapter dues as well as any other additional funds raised by the chapter
2. Establishing bank accounts and obtaining signature cards for officers with signing authority
3. Keeping an accurate and timely record of deposits and disbursements
4. Reporting financial status of the chapter to the local board
5. Securing federal and local tax ID numbers and filing tax returns when necessary
6. Preparing a balanced budget for the board to approve and follow
7. Advising the secretary of any delinquent dues payments and dropped members
8. Disbursing accounts payable in a timely manner and invoicing and collecting accounts receivable

### **Membership Chair**

This person is charged with recruiting and retaining members for the chapter. Typically they work with a membership development committee. More information on recruiting and retaining members appears in the chapter on revenue. Membership chair responsibilities typically include the following:

1. Generating revenue
2. Coordinating recruitment/retention activities
3. Annual dues renewal

### **Education/Conference Chair**

This individual is responsible for identifying topics and scheduling programs for the chapter's monthly meetings and/or the annual conference. This position is best handled in conjunction with a committee. Typical responsibilities include the following:

1. Scheduling education programs
2. Coordinating registration/logistics
3. Securing and working with speakers

### **ASHE Liaison**

Each chapter is highly encouraged to appoint an ASHE Liaison. Ideally, this individual will be a member of ASHE in your chapter who is not your Regional Board Member or another member of the Board. If they have been active in ASHE as a leader, even better. This individual will be an ongoing contact within the chapter for ASHE and will receive copies of all communications ASHE sends to the chapter. Chapter officers change frequently, while the intent is for the ASHE liaison to stay the same for a significant period of time. This provides a more consistent link between ASHE and the chapter. You may want to consider appointing someone from your chapter administrative staff and/or a committed volunteer (maybe a retired member or a chapter past president) who has joint membership in the chapter and ASHE national to serve in this role.

### **Advocacy Liaison**

This individual will be responsible for communicating and advocating on issues specific to the state or local level as well as providing feedback to ASHE on various national codes and standards issues affecting the profession.

### **Sustainability Liaison**

1. The Sustainability Liaison serves and acts as Chapter Champion to raise awareness of chapter members on the value of sustainability
2. The Sustainability Liaison will guide or connect chapter members to resources available from ASHE
3. The Sustainability Liaison will assist and encourage chapter members to maintain engineering criteria to help reduce operational costs and thereby increase the value and profile of their healthcare facilities to stakeholders and to the C-suite
4. The Sustainability Liaison will act as a change agent and data gathering person within the chapter to encourage participation in ASHE's Energy to Care program. He or she will monitor and report chapter participation
5. The Sustainability Liaison encourages the use of the resources of the Sustainability Roadmap to achieve cost savings

### **Sustainability Liaison Job Function:**

1. Serve as a conduit to direct chapter members to ASHE sustainability resources and programs
2. Encourage the chapter education committee to provide opportunities for sustainability speakers to present to chapter
3. Develop, drive, and promote an ASHE Chapter Challenge to encourage savings and present awards for savings achieved
4. Provide updates and communicate success stories, best practices, and case studies from chapter members to ASHE
5. Attend quarterly webinars hosted by the Sustainability Task Force
6. Provide sustainability updates for the chapter newsletter and to ASHE Regional Directors
7. Gather statistics for Energy to Care chapter participation and report them to the Sustainability Task Force quarterly
8. Encourage chapter members to become ASHE members

## **THE VITAL ROLE OF COMMITTEES**

Elected leaders can't do it all, so a healthy organization engages a number of volunteers in active roles. The most common way to do this is through a system of committees. Chapters that fail to establish a strong committee network miss the opportunity to identify prospective leaders, strengthen the network through activity, and tap the skills and talents of a broad cross section of members. Research indicates that the best way to ensure a new member stays a member is to get them involved in the chapter immediately, and committees are the best way to involve large numbers of people in the organizational life of the chapter.

## PARLIAMENTARY PROCEDURE

Parliamentary procedure is a set of rules governing the way meetings are conducted. If everyone agrees to the ground rules before beginning, a non-personal operational process exists for addressing disagreements, digressions, or problems.

ASHE recommends that chapters be familiar with [\*Robert's Rules of Order, Revised\*](#) or other parliamentary handbooks and assign an individual the role of parliamentarian—the arbitrator of the process. Parliamentary process has an enormous potential for championing the rights of the least individuals and can help ensure a smoothly run meeting.

Every meeting should have an order of business or an agenda. That agenda usually includes:

1. Call to order
2. Reading of the minutes
3. Treasurer's report
4. Presentation of reports
5. Unfinished business
6. New business

A quorum or minimum number of voting members must be present to conduct business legally. This prevents a handful of people from deciding for everyone. NOTE: Your bylaws should state what constitutes a quorum for your chapter.

## **Chapter 4**

### **GENERATING REVENUE**

***This chapter addresses the following topics:***

- Membership Recruitment/Retention
- Keeping Dues Manageable Through Non-Dues Revenue
- Additional Sources of Non-dues Revenues

## Overview

Chapters are always looking for ways to increase their revenue stream. The important thing to remember is that it is rare to find one grand-slam home run source of revenue. And you don't want to become too reliant on one source of revenue; if you have just one bad year, it could take a long time to recover. Most importantly, you need to make sure returns on investment have been examined. If you have to invest \$60,000 (plus your time) into holding a program that makes \$60,000, what's the point?

According to the American Society of Association Executives, associations receive an average of 42% of their total income from dues (regular, associate, and other categories). The most popular sources of non-dues income include convention registration fees, educational programs, exhibit fees, periodical revenue, and investments.

With membership being an important source of revenue and volunteer support, it's critically important to make sure your chapter is effectively managing membership recruitment and retention operations. To keep dues manageable, most chapters undertake non-dues revenue activities. This chapter will provide you with some basics needed in these important areas of chapter operations.

## MEMBERSHIP RECRUITMENT/RETENTION

No longer can we view the members of our chapters as a "captive audience," committed to joining purely for the sake of joining. They don't belong because they "should." They belong because you've earned their trust and support and then reinforced the value of membership through words and actions throughout the year. This chapter addresses the two critical aspects of membership: 1) keeping the members you have and 2) finding new ones.

In today's economy, it is estimated that it costs 10 times more to attract a new member than to keep one. With that in mind, we'll focus first on one of the most overlooked aspect of membership--keeping current members satisfied.

### Keeping Members

#### Make a Commitment to Retention

Member retention starts the moment an individual joins your organization. Too often, membership retention in organizations is an afterthought, with little attention paid during the year to reinforcing the value of membership whenever and wherever opportunities arise. Instead, a push is made just before the new invoices go out. However, chapters with successful member retention approaches may take a different tack. At every meeting, they talk about the value of belonging. They share examples of how chapter membership has paid off for someone they know. These groups publicly thank members for their involvement and reinforce how much stronger the chapter is because they belong. Above all, chapters successful at member retention find a way to keep members by educating them to the value of membership, engaged in activities through recognition and involved in programs through volunteerism.

#### Paying Attention to Member Needs

Research tells us that members of most organizations want programs that:

- Save them time and/or work
- Reduce expenses
- Help them make decisions
- Improve their relationships at work
- Help them do their jobs better
- Help them avoid costly errors or reduce risks
- Advance their opportunities for professional success
- Provide an established network.



While this list is not comprehensive, it has at its core the questions members ask most frequently in these days of limited time and dollars to devote to an organization, “*What’s in it for me?*” Therefore, when developing programs, be sure the program meet at least three of the above-mentioned criteria.

The most effective way to determine exactly what members want is by continually assessing member needs. Use surveys, focus groups and one-on-one discussions to discover what they expect from membership in both your chapter and ASHE. Then make an effort to deliver what they want. Reinforce that message in your newsletter by talking about the services you offer. Remind members about services at chapter meetings. Send them a list of services along with their invoice at renewal time. Above all, create a leadership mindset that doesn't presume that just because someone joined once, they will renew. Each existing chapter member needs to be "sold" on the value of belonging as much as a prospective member does.

## **The Critical First Year**

If a member renews after the first year, there’s a good chance they will continue to maintain their membership for many years to come. *So how do you ensure that first year members will renew the following year?* First, consider developing a mentoring program for new members. This type of program will allow them to receive “one-on-one” assistance, connect with other industry professionals and engage their participation in chapter activities. Second, conduct new member orientations as a way to educate new members about the value of the membership and allow them to meet chapter leaders, officers and administrative staff. Finally, establish a new member welcoming committee, encourage board/committee members to call new members and welcome them within their first 45 days. By developing a strong member outreach – you will strengthen your membership.

## **Nurture Your Unemployed Members**

There may be times that you find your membership suffering as a result of the economy. It would benefit your chapter to offer a membership waiver for those members who are out of work. It may also be a good idea to establish a small networking support group to aid in their [career search](#). When unemployed, a member can feel disenfranchised and cut off from support systems. By being there in a non-judgmental way, your chapter creates a bond. Insert link to Career Development button.

## **Pay Attention to Your Systems**

Don't assume membership is down because of economic factors or changes in the industry. In many cases, membership is down because of your internal processing system. People may not be receiving their invoices at the right address. They may have been dropped from a listing. Periodically review the way in which you record membership information, as well as the way in which invoices are processed, to ensure there isn't a problem.

## **Recruiting New Members**

### **Where to Find New Members**

The sources of potential [members](#) are limited only by your imagination. Try to think “out of the box” about how you are currently recruiting members as well as less obvious sources you may not have explored. Consider forming a recruitment task force to brainstorm both possible sources and the names of potential members. Consider some of the following:

- Ask your existing members for the names of people they know who should belong. Ask your members to get involved in recruiting these folks. Offer incentives for members to bring a guest to an upcoming event, establish a member referral program, hold an annual recruitment event invite only non-members and your chapter leadership/board.
- Look in the yellow pages for hospitals and health care and long-term care facilities that might have employees who aren't involved and should be.

- Get involved with your local Chamber of Commerce. This is a great way for you to talk about the chapter with the people you meet. They may be able to offer ideas and leads. Check your Yellow Pages for the U.S. Chamber of Commerce in your area. Embed a link to show readers how to access local or state FEMA for hospital contact information.
- Use other organizations' directories of people who work in related fields.
- Read health care industry literature for references to individuals in your area.
- Ask members to post on their bulletin boards about the chapter and its services.
- Alert the local media through press releases of your meetings. Regularly published announcements about meeting topics and speakers will attract prospective members.
- Attend some local colleges to encourage students leaning toward health care careers to get involved with your chapter so they can learn more about the field and meet other experienced professionals in the field.
- Look to related health care associations as a possible source of new members. Attend their meetings and discretely talk about the value of your chapter.
- Stay in touch with your Regional Director. They have frequent contact with potential chapter members, and by keeping an open line of communication, your chapter will be in a good position to recruit these individuals as soon as they are identified. In addition, [Regional Directors](#) send welcome letters to all new ASHE members that also promote your chapter.
- Don't overlook your own employees. They also need to be educated and mentored. Show readers how to access local or state FEMA for hospital contact information.

## Getting Potential Members Interested

Simply identifying a prospective member isn't enough. You need to pique their interest in the organization and create an understanding of the value of affiliation. You can do that in several ways:

- **Telephone recruitment campaign.** Set aside half a day, once a quarter, and enlist the aid of a few members to call prospective members and talk about the value of belonging. A personal touch is a critical element of this approach. You can also call members who have not renewed their membership. You'll find many times that the individual simply forgot to renew, moved, or in many instances, changed responsibilities and is no longer interested in membership. If that's the case, don't forget to ask for the name of the person who replaced that individual, and then actively recruit the new person for membership.
- **Direct mail solicitations.** Well-written direct mail efforts can be very effective but more costly by the time you create the cover letter and brochure, order labels, coordinate the effort, track responses and do a follow-up. In this approach you send the meeting invitation to the Directors of Engineering or Clinical Engineers (depending on your target market) and their staff, and request that they post it on the employee bulletin boards. If you choose to go the traditional direct mail route, remember that the value of the mailing is directly proportional to the quality of the mailing list you use. An outdated list with obsolete addresses and inaccurate names wastes your money and weakens your credibility. So if you choose to go with this approach, check the lists carefully for currency and accuracy. The best direct mail response falls in the 2-3% range. Just as important to the list is the offer made. Offers can include, for example, a free report, complimentary first meeting or a discount on products/services, etc.
- **Send personal letters from members to people they know suggesting they join.** This is a more effective approach for many chapters, both because it spreads the cost and relies upon the credibility of the member

sending the letter. The downside is ensuring that the letters get out, because this approach is outside the control of chapter leaders or staff.

- **Invite a prospective member to your meeting.** If you can afford it, the chapter should pick up the cost of lunch the first time a prospect attends. When you think about it, it is a pretty cheap way of recruiting. Identify prospective members with a special badge and ask existing members to introduce themselves to these individuals. You don't want a hard sell, but your current members are your best sales force when it comes to believability.
- **Offer Conference/Membership package.** Some chapters, as well as ASHE, have had a lot of success in both recruitment and retention by packaging a membership with a meeting registration. Keep in mind, though, that you may experience a lot of "churn" with these types of memberships if people aren't able to attend the [conference](#) each year.

### **Develop and Maintain Your Prospect List**

- Record important information about potential members, including demographics on each person, their institutional information, how their name surfaced as a prospect, if they have attended any meetings, etc.
- Break information into market segments to help you better target your mailing efforts. For instance, you should be able to differentiate between plant engineers, planners, construction managers, facilities management people, buildings and grounds, safety, etc.
- Keep your list up-to-date through periodic clean-ups to save time and money on mailings.

### **Track Recruitment Messages and Approaches**

- Use the system to track responses to recruitment efforts and conversion rates on non-members into members.
- Code the different reply devices or applications you use to determine the success of each different kind of mailing so you can tell which worked best.

### **Personalize the Approach for More Appeal**

- Make it friendly by devising a way to use your system to personalize letters.
- Develop different paragraphs within the body of the letter to reflect the different needs of different prospective members. For instance, the needs of facilities managers could be discussed somewhat differently than the needs of clinical engineers or security officers.

### **Provide Peer-To-Peer Recruitment Assistance**

- Give the names of non-members and potential leads in their areas to your membership committee recruiters.
- Implement a quick response system to provide names to members interested in recruiting their colleagues.
- Consider offering rewards to top recruiters. Some people respond well to a little motivation like free registrations or other items you might be able to obtain through vendor members.

### **Obtain Status Reports**

A solid system can give you reports on the effectiveness of your overall recruitment effort and an analysis of the success of each recruiter for the chapter. When you identify someone who has been particularly successful, don't hesitate to find out what else he or she is doing that works so well.

## **Avoid Possible Limits on Membership**

You may, unknowingly, be working against your best recruiting efforts if your chapter bylaws restrict potential members. Do you limit membership to those working only in hospitals, or do you welcome anyone working in the broader health care industry? Do you restrict the type of membership someone working in the trades can hold? Or can they belong at all? Periodically review any limitations that appear in your bylaws and consider modifying them if they are too restrictive. These limitations may have been appropriate 20 years ago, but as the health care arena changes, your chapter also needs to change.

## **KEEPING DUES MANAGEABLE THROUGH NON-DUES REVENUE**

Keeping membership dues reasonable is the secret of success for many chapters. The more realistic and affordable the dues, the more members you will have. But in order to keep dues in this range, chapters need to find alternative sources of non-dues revenues to supplement their revenue stream in a way that allows them to operate effectively.

## **ADDITIONAL SOURCES OF NON-DUES REVENUE**

### **Fundraising Efforts**

Fund raising--asking for financial or in-kind support--is one way to generate revenue. It is particularly effective when linked to a specific outcome. For instance, you can conduct a campaign to raise money for college scholarships offered by the chapter, carry out a research project with broad appeal, or institute a new educational series. Asking for money without connecting to how it will be spent is an extremely difficult approach to take, and is not likely to yield strong results.

The exception to this rule is asking your vendors for financial support for programs in return for some added exposure for the vendor. This is not traditional advertising, but it works essentially the same way. A vendor agrees to host a dinner, meeting or cocktail reception at a conference in return for printing their company name on the registration brochure or signage, and mentioning their name in a brief speech during dinner. Make no mistake, you are selling a commodity when you take this approach and it is critical that your chapter delivers on what was promised.

If you do identify a worthy cause for soliciting funds across a wide spectrum of individuals and organizations, you will need the commitment of a dedicated group of volunteers and strong leadership to guide the program. Without commitment and personal involvement, traditional fund raising efforts are exceptionally difficult.

### **Creating Trade Shows for Information and Income**

A trade show is an opportunity for members and non-members to view the products and services of a group of vendors to our industry who pay a fee for the exposure to attendees at the show. The trade show can be simple tabletop displays, or they can be very elaborate. They can include educational sessions on the show floor or be restricted to one-on-one discussions between vendors and potential customers. It is up to you to set the parameters of the trade show.

Careful planning is essential to running a successful trade show. As with other planning efforts, the first step is the formulation of objectives and policies. From this base, the details of the trade show emerge. Basic policies, established well in advance, allow for proper direction and control of the show. They provide the foundation upon which all else is constructed.

If the trade show is held jointly with a convention or annual meeting, the exhibit schedule should avoid conflict with any other scheduled events. This will ensure maximum attendance, and the price you charge for vendor booth space is driven largely by attendance.

## **Advertising**

If you produce a regular chapter newsletter, consider selling advertising space or running a listing of "business cards" ads of vendors to the field. Your vendor community wants to reach your members and will pay for the privilege. If you publish a directory of members, include a listing of vendors, and charge for inclusion, in addition to any ad space the suppliers may buy.

## **Logo or emblematic items**

This is another good source of revenue--things like coffee cups, tee shirts or paperweights with your Society's logo imprinted on them. [Emblematic items](#) are best if produced in conjunction with an event--like an annual conference--where they can be sold quickly and face-to-face. Be careful, however, warehousing and maintaining an inventory of these items can be expensive enough to diminish the profitability of the project and make it cost prohibitive.

## **Social Events**

Include a variety of social/networking events into your program in order to bring members together and produce some additional income for the chapter.

## **Types of Events to consider**

- Silent Auction
- Golf Outing
- Boat Cruise
- Receptions at Historic/Popular Attractions
- Walk-a-Thons
- Dine-Around

## Chapter 5

### DEVELOPING LEADERSHIP

*This chapter addresses the following topics:*

- Characteristics of Excellence
- Motivating Volunteers
- Recognizing Why People Volunteer
- Essential Leadership Skills
- Why Volunteers Are Essential for Chapter Survival
- Creating a Chain in Elected Leadership

## Overview

Associations are made up of members—groups of people who voluntarily come together to solve common problems, meet common needs, and accomplish common goals. Only by working together under innovative, effective leadership can these members solve problems, meet their needs, and achieve their goals.

The hallmark of a successful chapter is continual renewal through ongoing leadership development. And while we all know that natural talent contributes to leadership skills, leadership does not come naturally. Leadership combines skills and attributes that can be learned and improved upon. Studies indicate that about 2 percent of the members of any group have the capacity to be leaders. Leaders emerge in two ways—either by coming forward themselves (that is, volunteering) or through a carefully planned process of seeking them out.

To ensure an ongoing leadership base, the chapter must identify the people with the greatest potential (who may or may not [volunteer](#) their time) and guide their development. Leadership development begins with understanding what makes a good leader, and then learning to recognize those traits. Next, identify and involve potential leaders in the chapter; then reward them and give them opportunities to enhance [their potential](#).

## CHARACTERISTICS OF EXCELLENCE

According to a recent study, three critical elements are needed for excellence in nonprofit organizations: a sense of mission, the presence of a strong leader, and an involved and committed leadership.

### Mission

A clear sense of mission serves as the focal point of [commitment](#) for members and leaders. It is also the guidepost by which your chapter's success can be evaluated. In essence, it defines how your members' world will change as a result of the chapter's efforts. The mission of a chapter should be aligned with ASHE's mission, which can be found at the beginning of this handbook.

### Presence of a Leader

Successful organizations need an individual who truly leads and who creates a culture that enables and motivates others to work together to fulfill the group's mission. The best leaders have clear goals, a vision that looks beyond today's crisis, the ability to develop strategies to achieve this vision, and the capacity to involve others in the process. They must also have the courage to make extremely difficult decisions and a willingness to take risks and challenge the status quo despite what others may think.

### Involved and Committed Leadership

While most chapters are headed by a president—a single individual who is the official group leader—chapter leadership should be a shared experience. With an involved and committed group of volunteer leaders, your chapter is more able to relate effectively to your members and to ASHE. Your leadership group also provides a bridge to the larger health care community.

As a volunteer leader, you can successfully involve the members of your chapter through the following activities:

- Regularly gather information from members about what they need, want, experience, and expect from your chapter.
- Provide members with a continuous stream of information about what you are thinking and the rationale behind it.
- Provide quality programs and services that serve their common interests.
- Motivate voluntary participation by offering opportunities for members to achieve whatever benefits they consider important.

## **MOTIVATING VOLUNTEERS**

### **Essential Elements**

Nine elements contribute to the creation of an environment where members are motivated to participate. The conditions for motivating volunteers exist when people have the opportunity to do the following:

- Use their special knowledge and skills
- Give their life purpose and significance
- Help others
- Be recognized and acquire status
- Feel useful and needed
- Develop new skills
- Participate in enjoyable activities
- Gain competencies and visibility that advances them in work or social arenas
- Use leisure time and reduce loneliness and boredom

## **RECOGNIZING WHY PEOPLE VOLUNTEER**

People will join your chapter when it meets their needs and interests. They get involved in the work of the chapter for somewhat different reasons. Many want to achieve specific goals. Others are motivated by power, and they want prestige and authority and to influence others. Still others are motivated by the need to interact with other members. By understanding what motivates people to become involved, you can successfully place them in the appropriate volunteer position.

### **How to Reward and Praise**

The kinds of satisfaction people gain from being involved in a chapter are as diverse as the people who volunteer. Self-satisfaction for a job well done is important. But acknowledgment and praise from friends and colleagues stimulates the desire to continue working hard. Among the ways to reward hard work are awards, certificates, pins and plaques, and public recognition and thanks. You know best the culture of your chapter and can predict which of these will work.

### **The Difference Between Leading and Managing**

“Managing” and “directing” are often used interchangeably. When we think about a manager, we think about someone who presides over the process by which an organization or a group functions, who allocates resources wisely and makes the best possible use of people. Leading conveys a more visionary and less technical concept. Those who lead must be able to focus on vision and values. Leading requires long-term thinking, the ability to understand and motivate people, and intuitive political skills.

Being a leader and being a manager are not mutually exclusive. Although some leaders cannot manage and some managers cannot lead, true leaders have the ability to lead and manage. Chapters need leader/managers who are able to blend the positive qualities of each aspect.

### **Control vs. Motivation/Inspiration**

The leader/manager focuses less on controlling what people do and more on getting things done through other people. That involves identifying their strengths and creating an environment where they will be motivated to work toward achieving individual and group goals. Leader/managers begin with a vision of where they want to go and then communicate the benefits of working together to those they want to influence.

Those who are successful are able to inspire others by painting pictures that capture the imagination. They have the ability to create, through their behavior and their words, an environment in which others want to follow them.



## ESSENTIAL LEADERSHIP SKILLS

The skills described in this section are those typically depicted as management skills. The added dimension leaders bring to these management skills is their ability to involve others in the process of getting work done. Leader/managers help people turn their potential into performance.

Leadership/management skills include:

- **Planning and organizing**—establishing goals, developing a specific plan, soliciting input and support from members for realistic time frames for achievement, identifying who does what.
- **Listening**—keeping in touch with members' needs and expectations.
- **Selling**—selling ideas to others and involving them in implementation.
- **Delegation**—giving members more responsibility, encouraging them and rewarding creativity.
- **Communication**—communicating effectively both orally and in writing, being able to speak in public and to write in a clear, brief, and benefit-oriented style.
- **Problem solving**—helping people learn how to help themselves rather than solving their problems for them.

Furthermore, potential leaders should be open to criticism, sensitive to people, and willing to change. As a leader, your ability to be flexible and adapt to a variety of situations will be augmented if you are aware of and comfortable with your own limitations. A good leader doesn't need to be able to do everything by themselves or to be all things to all people. They learn how to delegate, realizing that the end goal can be reached via a variety of roads and understanding that being right is often less important than being involved.

## WHY VOLUNTEERS ARE ESSENTIAL FOR CHAPTER SURVIVAL

About 20 percent of the people in any given group are actively involved while the other 80 percent wait for things to happen. You need to focus your attention on the 20 percent, most of whom will be your potential leaders and volunteers. Leaders cannot do all the work that is required to move the chapter forward. Actively seek out those who have demonstrated a ready willingness to work, and quickly involve them. A good way to identify potential leaders and volunteers is to ask them to create a Volunteer Resume. This will allow you to equally assess each person's individual skills, experience, and leadership ability. Then, identify specific opportunities for each individual so they feel more attached to the chapter. This will be a great challenge and will call upon all your leadership skills.

### Take the Time That's Offered

Leaders who give freely of their own time frequently find it hard to remember that not everyone may have the same flexibility. Job, family and career demands, as well as differing lifestyles, all limit the discretionary time members have to give.

As a leader, you must be creative about breaking volunteer tasks down to accommodate the differing schedules of your members. The rewards for making this extra effort are great, for the end result will be the involvement of more volunteers and an increased infusion of new energy.

### Create a Positive Volunteer Experience

One of the most important tasks of established leadership is to provide a thorough orientation to new leaders. By acquainting them with the history of the chapter, issues of concern, and ground rules for behavior, you will help

them succeed. They need a clear understanding of expectations to perform well. When expectations and benefits are described early on, people will meet them.

In those few situations where expectations are not met even after extensive coaching, you need to shoulder the burden of leadership, thank the volunteer for serving, and suggest that they may want to volunteer at another time when they will be able to meet the demands of the situation. Even this dismissal of a volunteer should be carried out in such a way that it is a positive experience for the [volunteer](#).

### **Creating a Chain in Elected Leadership**

The greatest reward of leadership comes from being a mentor and encouraging protégés to move into leadership positions of their own. In most chapters this happens by working through the chairs.

### **The Value of Working Through the Chairs**

Once you have identified potential leaders, give them opportunities for involvement. One of the best ways to start is to have someone serve as a committee member under the guidance of an experienced leader. Throughout the term of the committee, those individuals who have shown promise can then move on to chair the committee and then continue to move up the chapter leadership ladder.

Chapters frequently place a high value on leaders gaining experience before rising to the presidency. People who have had progressively increasing responsibilities and are experienced in key areas of chapter decision-making usually have sharpened their skills and bring more to the process. However, it is important to maintain a balance between developing sufficient experience and knowledge about the issues and spending such a lengthy apprenticeship that they lose interest.

In addition, while experience and knowledge of the history of the chapter are important, fresh ideas and innovative thinking can revitalize an organization. Therefore, chapters should encourage those with fewer years of experience in the organization to become involved in leadership, and then provide opportunities for them to move up the leadership ladder. This is the most effective way to identify potential leaders and maintain a quality pool of experienced volunteers.

## Chapter 6

### **THE IMPORTANCE OF EFFECTIVE COMMITTEES**

***This chapter addresses the following topics:***

- Overview: Why Committees Are Essential
- Constructing Effective Committees
- Importance of Strong Leadership
- Running an Effective Committee Meeting

## **OVERVIEW: WHY COMMITTEES ARE ESSENTIAL**

Committees are the operating system of an association. Committees involve members in the development and delivery of [services](#), represent member opinion in decision-making, and help serve member needs through interaction. They also offer the opportunity for group problem-solving and can be a forum for presenting multiple points of view. Committees are also the training ground for future leadership and an arena where emerging leaders can test and refine their skills and abilities. For these reasons, committee effectiveness is critical to chapter operations.

## **CONSTRUCTING EFFECTIVE COMMITTEES**

Effective [committees](#) don't just happen. They are carefully planned and constructed to have a balanced representation of members, a clearly defined mission or objective and work plan, a dedicated chair, and competent staffing. Paid staffing is a real asset if you can afford it, but if you can't, make sure the people assigned to committees are conscientious and will complete what they've committed to accomplishing. Following are some of the key elements of making those things happen. Add a link to the ASHE committee list.

### **Types of Committees**

There are two basic types of committees—standing committees and special committees. Standing committees serve an ongoing, continuous function and operate indefinitely. Their function usually deals with organizational and operational procedures, or with specific permanent features of chapter programs. A special committee, often referred to as an ad hoc committee or task force, is assembled with a specific purpose in mind and a specific time frame.

Committees can also be classified by purpose or function into one of four categories:

- Administrative
- Project
- Study or problem-solving
- Liaison

### **Selecting the Right Size for a Committee**

The purpose and the nature of its work determine a committee's size. Here are some things to consider when determining the most appropriate size for your committees:

- If you need a prompt outcome, keep the size of the committee small. Smaller committees take less time to organize, can communicate more effectively, and can act more quickly.
- Create a larger committee if participation of a wide variety of members would be beneficial. Larger committees usually enable the chapter to hear more viewpoints and opinions, and to get more thoughtful recommendations. Because of their size, larger committees have more members to promote the value of a program or activity. In addition, the larger the group, the less likely all the work will fall to one or two people.
- Base the number of members on a committee on the segments of your membership that need to be represented.
- Use a small committee when seeking administrative direction.

For example, think in terms of large groups for a conference committee, and a smaller group for nominating work. There is no magic number for the size of a committee. However, a committee of 10 to 15 members will be able to split into smaller groups (if necessary) to accomplish the objectives of the committee. This size will also allow the committee to meet, make recommendations, and reach decisions as a quorum.

## What Committees Do You Need?

The mission of every chapter is different. The following are committees a typical ASHE chapter may want to implement. Those that are critical for effective operations are noted as \* and those recommended by ASHE are indicated with ++.

**Education Committee\***—This committee is responsible for developing, promoting, conducting, and monitoring the educational/training efforts of the chapter.

**Finance Committee\***—This committee monitors the investment of association funds, reviews and negotiates contracts and recommends their acceptance to the board, approves fees to be charged for services, establishes an accounting system, and oversees the annual financial audit. The role of this committee will vary greatly depending on whether paid staff exists.

**Membership Committee\***—This committee is charged with the development of new members for the chapter, promoting retention among existing members, and identifying new member services and programs to enhance the value of membership. For some chapters, this group may also be responsible for the development and distribution of the member newsletter and/or directory. (Where that is not the arrangement, this would be handled by the Publications Committee.)

**Awards and Recognition Committee++**—This committee oversees whatever award programs are in place, continually reviews the awards programs for currency, and suggests new ways to increase member recognition.

**Bylaws Committee++**—This committee is responsible for reviewing the association's bylaws for compliance with the national organization. If bylaws changes are required, the bylaws committee formulates them and submits them to the chapter's board for approval prior to submission to the membership. In addition, this committee may be responsible for, maintaining the records of the association, including pictures, legal records, and information pertaining to leaders' positions and volunteer involvement.

**Codes and Standards Committee++**—This committee is charged with an ongoing review of all codes and standards relating to health care to keep members of the chapter apprised of pending code changes. This group can also be actively involved in efforts to modify codes and standards, as appropriate, and may assist ASHE in reviewing codes and standards changes.

**Conference Committee++**—This committee is responsible for conducting the annual trade show and major educational activities of the chapter (separate from the ongoing continuing education requirements of the group). Because of the significant financial impact of this activity on most chapters, this committee has a critical stake in the group's financial health.

**Nominating Committee**—This committee is charged with developing the slate of officers for the coming year and may also be involved in recommending committee appointments. Typically, this committee consists of the past president, current president, president-elect, and one ex-officio.

**Publications Committee or Public Relations Committee**—This committee seeks to create attention for and awareness of the chapter, its members, and the profession they represent. In addition, this committee would be responsible for the development of the chapter member

directory, newsletters, press releases, and other publications. Other areas of responsibility might include sponsorships, advertising, and promotion.

### **Defining Responsibilities**

The areas of accountability for each standing committee within the chapter should be defined. The very process of clarifying each group's role establishes what results the organization expects from the committees' efforts and eliminates the possibility of having several groups claim the same territory as their own (i.e., you don't want the education committee undertaking the work of the membership committee).

## **IMPORTANCE OF STRONG LEADERSHIP**

### **Defining the Role of Committee Chair**

The overall success of a committee can often be directly linked to the effectiveness of the committee chair. Since this individual is ultimately responsible for planning the work of the group, conducting meetings, maintaining records and appropriate information about their decisions, ensuring actions are taken, and evaluating results, it's no wonder so much depends on their effectiveness. The following checklist will help you determine whether a potential candidate would be a good committee chair.

**Does your candidate...**

YES NO

		Communicate effectively? This important ability allows a committee chair to work with their group, the governing body, and related groups.
		Have a record of active participation and interest in the association's objectives? Have they served on the committee before and do they understand its charter?
		Have a willingness to listen? A good committee chair must be open-minded and encourage free expression of ideas among committee members.
		Have the ability to inspire and the presence to command respect?
		Have the ability to control a group without dominating it with their own personal agenda?
		Have at least a basic knowledge of parliamentary procedure? See <a href="#">Robert's Rules</a> .
		Operate as a self-starter, without having to be pushed, prodded, or reminded of commitments?
		Command respect within the industry?
		Have an understanding of the dynamics of group process and how a committee functions best?
		Have knowledge of the subject area that is the committee's purview?
		Have the ability to think and act in terms of the association's overall goals and objectives?
		Have the skill to create the right atmosphere for productive committee work?
		Have the time and resources to carry out the assignment? Good intentions are not enough.
		Have a clear understanding of the position and the role of association management and the need to work closely with the organization's governing body?

For the committee to be effective, the new chair needs a thorough orientation to their new role. That includes determining the committee's work agenda, clarifying governance roles—who does what, why, and how; what sort of checks and balances exist; the responsibilities and expectations of the chair (including outlining their duties); and complete background information. Background information should include the committee roster for the current and previous year, minutes from past committee meetings, background on the committee's accomplishments and activities, a list of members of the chapter's governing body (as well as ASHE's governing body), and key contacts. It may also be a good idea to conduct an annual committee orientation planning meeting for all incoming committee members.

### **Making Committees Effective**

Once you've selected the committee's leader, make sure they communicate the obligations of committee participation to potential committee members. Committee members need to clearly understand exactly what a position on the committee entails, including the time commitment, job duties, meeting times, and so on. Without understanding this up front, people who are willing to serve may not be positioned to serve well.

If your chapter has paid staff working on a committee, they should play an active role, not simply act as recording secretary. However, too much staff involvement may reduce the value of the committee and de-motivate volunteer members. If there is too little staff involvement, committees may drift aimlessly and be less effective. An appropriate staff role is to answer questions, offer suggestions, and raise questions, as needed. They provide assistance in completing work without taking on the role of an active committee member, so that committee members can focus on the bigger picture.

## **RUNNING AN EFFECTIVE COMMITTEE MEETING**

### **Meeting Preparation**

Advance work is the key to successful meetings. Solid coordination between staff and committee chairs is essential to making the necessary arrangements that will lead to success.

### **Suggestions for running a successful meeting:**

#### **The Agenda**

This is an often overlooked and undervalued element in designing a successful meeting. The agenda sets forth the work of the meeting and must be managed carefully to ensure that the number of items to be addressed doesn't exceed the time available for discussion. If a topic is important enough to add to the agenda, it is important enough to allocate sufficient time. In addition to the topics to be covered, the agenda should include the date, room, site, starting time, scheduled coffee and lunch breaks, and adjournment. It should also note who is responsible for leading the discussions on each topic presented.

#### **Selecting the Right Location**

There is no prescribed set of rules for selecting a location. The degree of urgency, availability and location of members, social facilities, and other scheduled meetings play a role, as do such elements as traditional meeting sites, costs involved, and ease of access. A location away from members' offices tends to focus participants' attention on the committee work at hand rather than offering business-related distractions. Don't hold a brief meeting at a distant location where travel time takes more effort than the meeting. Some chapters have chosen to use periodic telephone conferencing in place of face-to-face committee meetings. Carefully select agenda items for conference calls since some subjects, such as planning or brainstorming, don't lend themselves to conference calls. Also make sure you check out the costs involved in advance—these types of calls may be more expensive than you think.



## **Schedule Meetings**

You want to do this as far in advance as possible so participants can keep their personal schedules clear. Determining availability in advance is a desirable courtesy, but it can get complicated when more people are involved. Ideally the chair should select a date at the previous meeting. Once a date has been established, notify committee members of the decision. If committee members are expected to lead discussions or make presentations, they need that information as far in advance as possible. A good committee chair doesn't surprise anyone with last minute requests.

## **Physical Arrangements**

Although they may seem very simple, physical arrangements need to be spelled out in great detail. Leave nothing to be assumed. In working with a hotel, the committee chairs need to make sure the catering manager knows the room setup, breaks, food needs, audiovisual needs, and other equipment requirements. Put the details in writing and arrive early enough to reset the room or change the food order if the hotel got it wrong. There is nothing more disruptive to an effective meeting than having the hotel reset a room or deliver coffee service after the meeting has started.

## **Checklist for Committee Meeting Management**

A new committee chair will find the following checklist invaluable as they set out in their new role.

- Start on time.
- Make sure everyone is introduced by name and role.
- List the objectives of the meeting.
- Review the background material.
- Encourage participation by all, which includes talking judiciously and succinctly and listening carefully.
- Assign tasks prior to the start of the meeting, such as note takers and timekeepers.
- Remember that members of a committee are well informed in some areas and not in others.
- Keep the meeting moving and on task.
- Summarize major points during the session.
- Pay attention to interpersonal dynamics that may affect the meeting outcome.
- Talk to the group as a whole. Avoid speaking only to one person for any length of time.
- If energy flags or interest wanes, take a break.
- Solicit opinions and experiences, especially in areas of disagreement.
- If you are losing the group's attention, ask a question or shift the meeting pace.
- Try to draw out silent members. Direct questions to them or solicit their opinions.
- If someone dominates a meeting, direct thought-provoking questions to them, ask for their cooperation, or give them a special assignment.
- Adjourn on time. If you must run over, ask the group's permission to do so or solicit their input in how to change the agenda to end on time.

## **What Goes in the Minutes?**

While minutes from committee meetings are not legally required, doing so is helpful to members who are unable to attend and provides clarity on decisions taken and direction set. The approval of committee meeting minutes can be done by mail or at the start of the next committee meeting.

Committee minutes shouldn't be lengthy and cumbersome, but they should record significant discussion and decisions that were reached. Include the date, time, and place the meeting occurred, as well as the presiding officer's name. List those present, those absent, and others in attendance. Report the decisions reached and whatever follow-up actions and deadlines were agreed upon. Formal motions and their passage or defeat should also be recorded, along with a brief summary of the discussions that lead to the decisions. Don't spend a lot of

time attributing comments to individuals; rather, provide a high-level overview of the direction. If a next meeting is set, make note of it.

## Chapter 7

# HOW TO PLAN AND DELIVER EFFECTIVE EDUCATIONAL PROGRAMS

*This chapter addresses the following topics:*

- Overview
- Creating Content Value
- Types of Programs and Their Relative Advantages
- How to Develop Educational Programs
- The Importance of Program Affordability
- Marketing for Greater Participation
- Offering Continuing Education Units

## OVERVIEW

One of ASHE's major goals is to provide its members with opportunities for professional growth. A chapter continuing education program provides a vehicle for members to gain the knowledge, understanding, and skills they need. At the same time, the program encourages members to participate in the chapter's activities, and enhances ASHE's image as the organization of choice for individuals working in all aspects of health care engineering.

An effective and coherent chapter educational program is based on an understanding of how adults learn, which is significantly different than the approaches used when we were all in school as children. Adults tend to be pragmatically oriented, wanting nuts and bolts information and materials that apply directly to them and their work setting. In addition, they like to be actively engaged in the learning process and often prefer to learn by doing rather than simply by observing or listening.

To measure the success of your educational program, keep three different aspects of the experience in mind throughout the planning process.

- **Program Objectives**—What do you hope to accomplish? How many members do you want to reach? How extensive an educational program can you implement?
- **Financial Objectives**—How much money can the chapter spend on educational programming? Do you expect to make money on the programs?
- **Qualitative Objectives**—How well will you be able to meet your members' needs and interests?

## CREATING CONTENT VALUE

The first and most important element in an educational program is the needs of your members. You need to determine the subject matter—the specific information and skills your members want to acquire—before you can select the appropriate program format or speakers.

### Why content is critical

There is a direct correlation between attendance at an educational program and the relevance of the subject matter. By focusing your programs on current and future problems or issues facing health care engineering and facility management, you can have a direct impact on how your members face these issues. It is critical, therefore, that you systematically assess your members' needs and interests.

Sometimes, however, members are not aware of particular issues that will affect their lives—new technology or techniques that would help them perform their jobs; impending regulations; social, economic, or political developments; or general industry issues. As a chapter and professional leader, you may see a particular issue as having an impact when many of your members may not. Under those circumstances, educational programming can create awareness about those particular issues that do not surface in a member needs assessment.

### How to Determine Members' Needs and Wants

An educational programming committee is vital to ensuring broad member involvement in chapter activities. But this relatively small group may not be totally representative of the membership and may not have sufficient information to plan the types of programs that will appeal to a broad cross-section of your members. A systematic process for extracting member input to identify educational needs and desires will enable the committee to plan based on concrete information.

To be sure you have accurate data, use at least two methods to collect data on members' needs and desires. While you probably have heard a great deal about techniques such as focus groups, these require more time and expertise than chapter leaders generally have. The following methods are among those most useful and easiest to implement:

- Discussions with key individuals, leaders, and experts in the field can provide information about and insight into problems or issues they face or anticipate facing.
- Questionnaires and surveys are useful ways to elicit information or confirm problems and issues that have already been identified.
- Written evaluations of previous programs, particularly when a place for comments and suggestions is included, provide valuable insight into members' reactions to both content and format.
- Articles that appear in ASHE publications or in professional journals also are excellent sources of problems or trends that face the industry.

In the process of collecting this data, it is important to differentiate between groups of your members. Professional position, degree of experience, and academic background are all factors that affect the type of educational offering they will want.

## **TYPES OF PROGRAMS AND THEIR RELATIVE ADVANTAGES**

The subject matter of a program will provide you with a framework for deciding the program format. You will also want to consider the difficulty of the subject matter and the appropriate size of the audience.

### **One-Day Seminars and Workshops**

The seminar or workshop is an ideal way to teach new skills or engage members in an in-depth learning experience. Because of their intense nature, these programs are most effective with small groups ranging in size from 10 to 50, depending on the subject matter or format. Their small size enables all the attendees to actively participate in the discussion process.

Seminars are specialized study sessions led by an authority on the subject who can assist and guide the learners and who provides them with detailed materials and texts. They tend to be more academic in nature, often focusing on theory. The format usually consists of a short lecture or presentation followed by discussion in small groups that then report their results back to the larger group. Workshops are generally a more hands-on learning experience and are especially useful when the desired outcome is enhancement of a skill. Both create an atmosphere of great involvement and team spirit.

### **Monthly Meetings**

A less intense but equally effective approach to education can occur at monthly chapter meetings. Because these programs are generally fairly short, this format does not lend itself to an in-depth approach to a topic. However, regular educational programs for chapter members can be scheduled into these meetings to convey general information about a specific topic, or when the desired outcome is to change attitudes about a particular issue.

The frequency of monthly educational programs enables you to vary the topic, thereby appealing to a wider audience. The formats can range from lecture presentations to panel discussions. Finally, in these settings audience participation can be actively encouraged. The added advantage of a monthly meeting is regularity of contact—a predetermined time when members can gather for networking and discussion. The networking that occurs is often as valuable as the formal educational offering.

### **Are Business Meetings Necessary?**

Business meetings that are purposeful and well run and accomplish the necessary business in a reasonable time are an important component of the smooth operation of a chapter. All too often, however, the only people who attend such meetings are the chapter officers. One way to increase attendance is to schedule an educational program in conjunction with the chapter business meeting and invite the membership. In addition to benefiting

from the program, members will have greater exposure to the issues the chapter faces, and, of course, their participation in chapter activities may increase.

Many organizations find that combining business with meeting member needs to be so effective that they routinely schedule programs along with chapter business meetings. The caveat is that the business meeting needs to be efficient and effective or people will attend only the program, or not at all.

## **Conferences**

The term “conference” often signifies a large meeting of several days’ duration. In fact, conferences can range in size from 25 to more than 2,000 attendees, and can be as brief as a half day, or as long as 3 to 4 days. The term conference is usually reserved for an [educational program](#) that includes multiple elements, from technical papers and presentations to lectures and speeches, many of which occur simultaneously. A conference can accommodate larger audiences, and both the program content and format of presentations can be varied, thereby appealing to the widest possible audience. Insert ASHE website link showing ASHE Education programs.

## **Do Vendors and Education Mix?**

One particularly effective teaching technique for adults is to create an experience where they are physically engaged in the learning process. Involving vendors in an educational program presents an excellent opportunity for such direct learning. In such settings participants can experience first-hand demonstrations of particular equipment or a new product or have an opportunity to actually use a skill.

## **HOW TO DEVELOP EDUCATIONAL PROGRAMS**

Once you have determined the content and format of the educational experience, it is time to begin planning the program.

### **Sources for Program Ideas**

The educational program committee has the task of developing specific programs that will address member needs and attract an audience. A creative brainstorming session is an excellent way to begin. ASHE is a good source of program ideas, as are other chapters that have carried out successful programs. Programs that worked before can be recycled, particularly if there is continued interest in the content.

### **Creating a Balance Between Social and Educational Programs**

In addition to professional development and keeping up with trends and information in health care engineering and facility management, ASHE members, like members of most associations, want to interact with people who have similar interests and concerns. Networking with other professionals is an educational experience in itself, where people share problems they face and solutions they have found. Therefore, it is critical to include opportunities for socializing in every educational experience. For many people, this is the primary reason they attend.

### **Where to Find Good Speakers**

Finding a good speaker is often a challenge, but it doesn’t need to be, especially if it becomes a part of your ongoing chapter planning efforts. When you attend ASHE conferences and meetings, ask yourself whether your members would like to hear the speaker you just heard, or to learn more about that particular topic. ASHE maintains a faculty database that can be shared with chapters. Keep a running list of potential speakers and regularly ask colleagues for suggestions. And don’t forget about local professionals. Your own membership may have a great deal of expertise that can be tapped.

If a chapter member receives an award or other recognition for innovative ideas, ask them to share that at a meeting.

While the content and socializing are important to an educational program, the speaker determines the quality of the experience. Among the criteria used in selecting speakers are their mastery of the subject, how effective they are in engaging their audience, the quality of their materials, and how well they present their ideas. Try to select speakers you or others have heard so that you can be sure their presentation style is appropriate for your members.

## **THE IMPORTANCE OF PROGRAM AFFORDABILITY**

Know your potential audience for a particular program and assess the whether a particular fee is fair and tolerable. Affordability is often an important consideration in the decision to attend a particular program, and you can often determine this as part of the needs assessment process. If you are positioning the offering for senior executives, a higher cost may be warranted than if it is geared toward general staff. You will probably want to charge a lower fee if participants will be paying for the program themselves.

### **Don't View Education as the Major Revenue Source**

Most chapters do not consider their educational program as a major revenue source. Local educational programs are often considered a benefit of membership that is included in chapter dues, and charging more than a nominal fee may have a negative effect on the chapter's ability to engage member interest. Of course, you must balance this with the funds available in the treasury.

### **Ways to Supplement with Other Revenue**

There are a number of ways to supplement the costs of a particular program to keep the fee low. If you include a meal function, you can often charge enough to cover basic program costs. An excellent way to attract potential members, as well as add to the balance sheet, is to invite non-members and charge them a higher fee. Finally, you can seek underwriters who may have a particular interest in the content of the program.

## **MARKETING FOR GREATER PARTICIPATION**

Marketing programs is not a complex process. Thinking about marketing at the beginning of the planning stage will help you position your programs for success. You already began the process when you assessed your members' needs, a market analysis technique that gives you information about the educational offerings different segments of your membership want and how much they will pay for a program.

Develop a systematic plan for marketing the programs by determining the target audiences, the type of materials each audience will receive, and the timing of these efforts. Present your educational program as a coherent series of offerings that members will want to attend either individually or as a whole.

### **Who Should Know?**

If you limit your public relations efforts about chapter educational programming to chapter members, you will miss the opportunity to promote ASHE in the larger hospital engineering, facility management, and health care communities, as well as the general community. Publicity about ASHE programs also increases the visibility of ASHE and enhances the value of membership in the organization. So ask yourself whom you want to influence and target your promotions accordingly.

### **Who Should Be Invited?**

Be realistic about the potential audience of a particular program. However, don't narrow your mailing too much or you will limit the scope of potential attendees.

## **When Should They Know?**

The best conceived, designed, and executed program can fail dismally if you don't allow sufficient lead time in the promotion stage. It doesn't help to learn today that the perfect program to meet your most pressing need was offered yesterday. For attendance programs that require committing more than lunch or breakfast time, allow at least twice the lead time as you would for a regular chapter meeting. Four to six weeks minimum between receipt of the announcement and the event is not unrealistic. "Receipt" here is the operative word, however, because you cannot rely on the post office to deliver bulk mail in a timely and expedient fashion (allow at least 14 business days for delivery). Don't undermine your efforts by failing to allow enough time for the promotion to reach the potential audience.

## **How to Attract Interest**

The likelihood of generating interest in educational programs is significantly increased if your materials demonstrate how participants will benefit from attending the program. Promotional materials should be attractive, with a catchy program title and a description that clearly explains what will be covered. In addition to publicizing programs in the chapter newsletter, send out invitations and press releases. Take out an ad if you have funds and it is an important program. Find a co-sponsor who will also publicize the program. Taken together, all of these efforts will pay off with increased attendance.

## **Importance of Selling Administrators on Value**

It is especially important to target administrators as a special audience to receive promotional material about your programs. Even if they are unlikely to attend themselves, they have the authority to approve professional development opportunities for their staff, and they need to be convinced that the program will ultimately benefit the hospital or health care facility. Therefore, it is critical to include information explaining "What's in it for them?" in your marketing materials.

## **OFFERING CONTINUING EDUCATION UNITS**

Continuing education units (CEUs) help your members document their professional development and lifelong learning activities. As defined by the International Association for Continuing Education and Training (IACET), one CEU is equal to 10 contact hours of instruction in a continuing education activity. Any activity shorter than one hour in duration is not eligible for CEUs.

CEUs are based on 60-minute hours. For example, .10 CEU is granted for every 60 minutes of instruction, not including breaks, registration times, introductory periods, and evaluation times.

### **Events Eligible for CEUs**

Events that are eligible for CEUs include workshops, seminars, conferences, and audio programs one or more hours in duration.

### **How to Apply for CEUs**

ASHE is an official provider of CEUs. If you wish to have your chapter program [approved for CEU credit](#), the following information must be provided:

- Faculty biographies that indicate that the instructor is qualified to present the material and meet the learning objectives.
- Learning objectives for each session for which you are requesting CEU approval.
- A timed agenda for the program.



Your request should then be sent via mail, fax or e-mail to:

Avis Gordon  
Senior Specialist, Chapter Relations  
ASHE  
155 N. Wacker Dr, Ste 400  
Chicago, IL 60606  
Fax: (312) 278-0485  
E-mail: agordon@aha.org

Please allow five business days for approval of your request. Your chapter is responsible for keeping records of attendees and the number of CEUs provided for each program.

### **Promoting CEUs**

Offering CEUs encourages people to attend your programs to maintain a certification, such as the Certified Healthcare Facility Manager (CHFM) and Certified Healthcare Constructor (CHC) designations offered by the American Hospital Association (AHA) Certification Center, as well as the Senior ASHE (SASHE) and the Fellow ASHE (FASHE) designations. CEU approval also adds credibility to your program and helps advance the fields of health care engineering and facility management.

Once ASHE has given your program CEU approval, you should state on your marketing brochure that:  
“Attendees will earn Continuing Education Units (CEUs) approved by the American Society for Healthcare Engineering of the American Hospital Association (AHA) and the AHA Certification Center. A maximum of (# of CEUs) CEUs can be earned by attending (chapter program’s name).”

If you have any additional questions, contact ASHE at (312) 422-3800 or via e-mail at ashe@aha.org.

## Chapter 8

### **PUBLIC OUTREACH**

***This chapter addresses the following topics:***

- Overview
- Public Outreach
- How to Get Your Message Across
- How to Issue a Press Release
- Being Interviewed
- Ideas for Generating News—Creating Opportunities

## OVERVIEW

The broader the scope of your chapter's influence, the more effective it will be. Influence comes through understanding. You strengthen your chapter and enhance the value of membership by:

- Creating awareness of the issues of concern to your members
- Taking a stand on legislation or regulations that will affect your members and their employers
- Ensuring that the public in your community understands that effective health care engineering and facility management is related to reducing rising medical costs and improving the quality of patient care.

For these reasons, public relations—outreach to identify non-legislative audiences of importance to your organization—and government relations/advocacy—outreach to public policy audiences—should be viewed in concert. They are two sides of the same coin and work best when they are done together.

## PUBLIC OUTREACH

For most people, the link between advocacy and public relations isn't as clear as it should be. Part of the problem lies in the way people traditionally view public relations—slick, somewhat superficial, and designed to put the best spin on a problem—and the way they view public affairs—often as manipulative and only focused on self-interest. After all, why else would they call PR guys “spin doctors,” and why would the term “lobbyist” have gained such a negative connotation? Those negative labels still apply in many organizations, but more enlightened groups look at public relations and advocacy as ways to tell their story and influence opinion in an ongoing, open, and strategic way. That means being honest, talking about what works and what doesn't, not saying “no comment,” and positioning messages to specific, highly targeted audiences instead of trying to influence the entire universe as we know it.

Advocacy is usually geared not to the general public or the general media, but to lawmakers and regulators, and it is usually focused on a specific set of issues. Advocacy is calling on your local or state legislator to voice your support of or opposition to an issue. The two disciplines overlap in that the effective use of public relations can raise awareness of your issues to the point that public opinion helps you win your advocacy efforts.

### **Defining Your Audience**

Whether it's public relations or advocacy, the first and most important step is to identify the audience you want to reach. After all, since the real purpose of communications is to maintain or change the behavior of an individual or a group, you first have to figure out whose behavior needs to be modified. An audience is as an individual or group whose opinions have a significant impact on your organization and whom you want to influence in some way.

Typical audiences for your chapter might include:

- Current members
- Suppliers/vendors
- Potential members
- Hospital administrators and CEOs
- Legislators (local, state, national)
- Regulators (local, state, national)
- Other professional organizations
- General public
- Opinion leaders (members of hospital boards, governing councils, public health agencies, etc.)
- Local media

Once you've defined the audience, you need to establish priorities. You are unlikely to have sufficient resources to reach all audiences with the same amount of energy, so pick your key targets carefully. Once you've done that, examine where they stand on the issue in question and how you'd like them to think about it. The following chart might be a useful guide for determining this information.

<b>Audience</b>	<b>Current Thinking/ Understanding of the Issue</b>	<b>What We'd Like Them to Think</b>
Hospital administrators	Don't really appreciate the growing complexity of the role of facility management	Better understand the contribution we make to keeping down costs and why investment in basics will pay off in the long run
Health care media	Focused on health care reform but little coverage of the role of facility management in controlling costs	Include our perspective in articles to balance out negative coverage of high cost of physical plants and over-building nationally

This grid format can be adapted as needed, but the idea is to identify the audiences, then contrast the current and desired perspectives. By doing this, you've begun the important next step—crafting messages that address these concerns.

### **What Do We Want Them to Know?**

Your message may be as simple as reminding members of an upcoming chapter meeting or as complex as creating understanding by the C-level of facility management's contribution to health care delivery. Whichever the case, specificity is the key. Make sure you consider what your audience needs to know to make a decision, take action,

or make a commitment. Remember that your overall objective is to create a positive response to your chapter, and to have the audience value what you have to say.

Once you've decided on your message, don't be tempted to fall into traditional traps. Don't tell anyone—whether press or government official—something off the record. If you don't want your comments to come back to haunt you, presume everything you say could be on the front page of the local paper tomorrow. When in doubt, err on the side of discretion. You also need to be consistent in what you say, giving the same message each time, even if the words or the twist is different. For instance, don't tell the press you aren't interested in a piece of legislation and then lobby for its passage. Don't tell members something different than you tell the media. That doesn't mean you have to use the same words—you just have to send the same message.

### **How Much Can I Spend?**

While public relations and advocacy efforts aren't paid advertising, they aren't free either. There are direct costs—for example, photos, printing, mailing, creative support if you are using graphics, and travel expenses. There are also indirect costs, for example, your volunteer time and the goodwill value of what you are undertaking. Your chapter will need to establish a budget for how much it makes sense to spend.

## **HOW TO GET YOUR MESSAGE ACROSS**

You can choose from numerous approaches. When you are thinking about media, be creative. Media means more than newspapers, magazines, and newsletters. It also includes radio and television. And don't forget local cable channels, many of which are hungry for information. There are also community groups, membership organizations, speaking and teaching opportunities, and much more. Remember, you are seeking exposure for your idea or position, so the more opportunities you have to present your thoughts, the better .

Following are some techniques to consider.

### **The Press Release**

The basic staple of public relations, press releases are brief statements designed to position your chapter on an issue. Press releases are sent to a predetermined media list (not everyone on your list will get the same information every time—be aware of the value of segmenting how you distribute information). Make sure a copy of your release is also sent to the state senator or representative you want to influence (if appropriate). Your local press club will have a distribution rack for this kind of information, as will the state capital media office. Add both to your distribution list to maximize the distribution and exposure of your press release.

Press releases need to be simple, clear, and to the point. Avoid the use of jargon, don't presume an extensive understanding of the technicalities of your field, and don't assume that just because you sent it, it will get printed. You'll increase the likelihood of press coverage if the message is tailored to the style of the publication you sent it to. For instance, if the local paper doesn't carry meeting announcements, don't send an announcement of your meeting. You may, however, want to talk with the reporter who covers your area and invite him to attend the next session to hear a particularly dynamic speaker.

### **Letters to the Editor**

Pay close attention to editorials that run on issues of interest to your chapter, and don't hesitate to draft a response—either in support of an editorial or pointing out why you disagree. In rebuttals, taking care to be objective, non-threatening, and rational will increase the likelihood it will be printed.

### **Newsletter Distribution**

If your chapter produces a newsletter that covers more than simply what is going on with chapter members, consider adding reporters, regulators, and legislators to the mailing list. But only do this if you are sure the content will be viewed as meaningful.

### **Personal Contact and Visits**

A visit is a great way to tell your story, whether to the regulator who is devising new codes and standards or to the reporter who covers health care. However, never show up unannounced. While getting an appointment may be tough, it is easier than restoring your credibility if you come unannounced and uninvited.

Get to know the people whose actions affect your industry. If Senator Smith knows who you are, you are more likely to secure an appointment and he is more likely to listen carefully to what you have to say when you get there. You can establish rapport through correspondence and phone calls and by developing a reputation as a source of valuable, unbiased information.

### **Testimony**

The next best way to tell your story is through formal testimony that gets read into the official state record. These invitations are often hard to come by, but many bodies that develop codes and regulations announce hearings and invite people to present differing opinions for consideration. You'll increase your chances of being asked back if you are objective and articulate in your response. Take advantage of this to issue a release on your position, along with a copy of your official statement. Let your members and other key audiences know you've contributed to the process.

### **Coalitions**

You can double or triple your impact by teaming up with other organizations that share your views on an issue. Coalitions are a great opportunity to strengthen your position and represent an even larger constituency. Don't hesitate to tell the media you are part of a coalition, and use the synergy of the group to strengthen the position of all participants.

## **HOW TO ISSUE A PRESS RELEASE**

Remember, a press release can have multiple destinations, so make it as complete as possible while keeping it concise. Here are some hints.

### **Format**

Type the release on your chapter letterhead. Always double space and print on one side only. Include the date of the release and your name and phone number as a reference for those who want more information.

### **Content**

Always include the who, what, why, when, how, and how much in your release. If appropriate, include a brief quote from someone named in the release, such as the chapter chairman, the conference keynote speaker, or a committee member. And make sure you develop a boilerplate description of your chapter's mission and purpose. This boilerplate runs at the end of every release. If the release is more than one page, number each page, place the word "MORE" at the bottom of each page, and indicate the end of the release by typing "-##-" centered under the last sentence of information.

### **Photos**

If you send pictures with your release, make sure they were taken by a professional photographer. Don't send instant pictures, don't send color snapshots, and don't write on the photo. Do send a glossy black and white photo, in focus, of a small group (no more than four people) and attach a caption that you've typed out separately and taped to the back of the photo.

### **Timing**

Learn the deadlines of the publications and stations to which you are sending information. When a reporter receives good material on deadline, the material is less likely to be used. And if you call a reporter on deadline, don't be surprised if they won't talk with you. This is a stress-filled time, and the reporter has other things to worry about.

### **Logistics**

Keep a file of all the releases you issue, and post them to your website. Don't forget to let ASHE know when you make a particularly strong contact or placement. Don't call reporters to ask if they got your release. You may want to follow up with a phone call, fax, or e-mail message a week or so after sending it with a related item, but if the reporter got your release and is interested, they will call you.

Send your releases by first-class mail. E-mail and fax are also acceptable. This is especially important for releases announcing something about to happen. Allow sufficient time between when you send it and the date of the event so that the reporter can plan to attend, announce the event, or both, if appropriate.

## **BEING INTERVIEWED**

While the results are somewhat different, the approach to a media interview is very similar to a face-to-face meeting with a legislator you want to hear your viewpoint. The following rules apply in both situations:

### **Talk from the viewpoint of the public, not the organization.**

You are looking for the public value in your position, not just the personal benefit to your members, so make sure you encompass a wide group in your worldview.

### **If you don't want to be quoted, don't say it.**

Remember that there is really no such thing as off the record.

### **Get your most important points in first.**

You may not have a lot of time, so know in advance the most critical things to emphasize. Ask yourself, "If I could only make one point, what would it be? If I could only make two points, which are most important?" Work through that process to maximize the value of the time. In most cases, you only want to get two to three points across in any one session.

### **Don't lose your composure or get into an argument.**

If the reporter or the legislator doesn't agree with you, you can have a discussion, but you won't win a debate. Be careful about being baited to make a more interesting story.

### **Don't be afraid to say "I don't know, but I'll find out."**

This is the right answer. Under no circumstances should you try to fake information. It is a sure way to lose both credibility and respect.

### **Tell the truth always.**

Never exaggerate, never embellish, and never misrepresent. Sooner or later, someone will find out. Be brutally honest.

### **Watch out for traps.**

Reporters often use questions that have no right answers, questions that put words in your mouth and produce negative answers, no matter what you say. —The press calls this technique "when did you stop beating your dog." Watch for these questions, and always, always, always think carefully before answering.

### **Don't presume you are buddies.**

Reporters and politicians get what they need by making people feel comfortable with them. Remember that this is an important exchange. Keep it on a professional level.

## **IDEAS FOR GENERATING NEWS—CREATING OPPORTUNITIES**

There are lots of ways to tell your story. Here are just a few to get you thinking:

1. Share your publications with the media and send clips from ASHE material to your local contacts along with your observations and thoughts.
2. Issue releases on newsworthy stories appearing in your publications.

3. Build programs around awards, appointments, and scholarships—both to strengthen the chapter and for the exposure it yields.
4. Create releases for members who attend educational or meeting activities.
5. Issue personalized releases for members who receive certification or other special professional recognition.
6. Use your annual meeting or trade show to generate publicity.
7. Use your ongoing educational program or seminars to generate local/regional coverage, depending on the topics.
8. Develop regional experts who can talk with the press as national stories develop—people who can provide a local angle and who are on call.
9. Get your media accustomed to relying on you for input.
10. Create special research activities to support your concerns.
11. Arrange local interviews for ASHE spokespersons who are speaking at a chapter meeting, or who are in town on other ASHE business.



## Ways Public Relations Contributes to the Bottom Line

STRATEGY	TACTICS	OUTCOMES
Awareness and Information	Publicity, promotion, audience targeting	Pave the way for sales, fundraising, stock offers, etc.
Organizational motivation	Internal relations and communication; OD interventions	Build morale, teamwork, productivity, corporate culture; work toward one clear voice outreach
Issue anticipation	Research; liaison with all publics	Early warning of issues, social-political change, constituency unrest
Opportunity identification	Interaction with internal and external audiences	Discover new markets, services, products, methods, allies, positive issues
Crisis management	Respond to OR blanket issues, disasters, attacks; build coalitions	Protect position, retain allies and constituents, keep normal operations going despite battles
Overcoming executive isolation	Counseling senior managers about what's really happening; research	Realistic, competitive enlightened decisions; knowledge of the human climate
Change agency	OD, QWL, corporate culture, similar techniques; research	Ease resistance to change, promote smooth transition, reassure affected constituencies
Social responsibility	Social accountancy, research, mount public interest projects and tie-ins, volunteerism, strategic philanthropy	Create reputation, enhance economic success through "double bottom line," earn trust, attract like-minded supporters and customers
Public policy activities	Constituency relations; coalition building, lobbying, grassroots campaigns	Public consent to activities, products, policies; removal of political barriers

## Chapter 9

### CHAPTER COMMUNICATIONS

**This chapter addresses the following topics:**

- ❑ Overview
- ❑ How to Improve Your Communications Management
- ❑ Involving Your Reader
- ❑ Executing Professionally
- ❑ How to Avoid Legal Pitfalls
- ❑ Budget Basics and Tips for Communications
- ❑ A Checklist for Newsletter Production and Planning
- ❑ Innovating and Adapting in a Fast-Changing World
- ❑ Developing a Chapter Website

## OVERVIEW

Suppose you were starting your chapter from scratch. Would you start by enrolling new members? Drafting bylaws? Holding an organizational meeting? Regardless of what you would do first, odds are that establishing regular channels of communication would be a high priority.

What would it be? What would it say? How frequently would it be sent? Would you seek advertising? How would you measure its effectiveness? These are just a few of the important questions to think about.

In reality, your chapter has probably been in business for some time. But the same questions provide a framework for reviewing the objectives, formats, and content of your chapter's communications.

The goal of this document is to provide you with practical checklists, quick tips, new ideas, and useful resources to help you refine and improve your print (primarily your newsletter) and electronic (primarily your website) communications. Five themes can provide a foundation for your planning.

1. **Integrate Your Newsletter** into Your Overall Communications—While the newsletter is typically a chapter's flagship publication, it is just one channel. Others include your website, electronic newsletter, group e-mails and/or faxes, special mailings, and more. The challenge is to integrate your messages and develop continuity in all communications.
2. **Involve Your Reader**—By definition, communication is a two-way street. Always seek feedback and interaction. Talk to, not at, your reader.
3. **Execute Professionally**—Know the fundamentals of good copywriting, editing, and graphic design. Stay on top of legal, administrative, and budget issues.
4. **Innovate and Adapt**—Keep up with the latest trends in communications and design and the use of new technology tools. Stay in touch with your readers so you know when it's time to refresh your publication or website.
5. **Develop a Chapter Website**—Consider marketing your chapter and serving your members using a website.

## HOW TO IMPROVE YOUR COMMUNICATIONS MANAGEMENT

### Integrate Your Newsletter into Overall Communications

One way to improve integration is to look for opportunities to cross-reference. For example, if an article in your newsletter relates to an upcoming meeting, you could refer to a special mailing that was sent to promote that program. Or, if you send a group e-mail to members, look for an opportunity to insert a link to your website.

Think of your communications not as stand-alone pieces, but parts of an ongoing conversation with your members. The purpose of the conversation is to share information and ideas and create a sense of community. Keep your message consistent and focused to create a seamless communications program.

A good first step is to set objectives for various communication channels. For instance, ask yourself what you are trying to accomplish with your newsletter. The following are some possible answers:

- Report on news about the profession.
- Report on ASHE news, chapter meetings, and events.
- Announce meetings and encourage attendance.
- Deliver a mail back/fax back registration form.
- Summarize events/meetings.
- Provide updates on local and state codes and standards.
- Call for action on a particular [issue or event](#).
- Provide a means for members to share opinions, test new ideas, and create community.
- Ask for member feedback on an issue.
- Provide information about members.

- Feature new members, those who have passed away (“in memoriam”), and those who have received special awards.
- Seek new members.
- Feature membership services/benefits.
- Provide leads and resources where readers can find more information.
- Generate non-dues revenue (in the form of advertising revenue).
- Provide an opportunity for suppliers to gain visibility.
- Create a buying community with product/service and classified ads.
- Reinforce the purpose and mission of the organization.

## **What You Should Know About Mission Statements**

A written [mission statement](#) for your communications vehicle can help reinforce your commitment to communication goals. Think of your mission statement as a welcoming message and an introduction to your publication. Keep it short and simple. Consider including it in every communication, on your website, in your annual directory, and with each issue of your newsletter.

## **INVOLVING YOUR READER**

Whether it’s an e-mail, an item for the website, or your newsletter, have the reader in mind when you start to write. Ask yourself:

- What does the reader want to know?
- What information can the organization provide that the reader cannot find elsewhere?
- What information does the organization need to share with members?
- How can this communication channel be best used to create a sense of community among the members?

To gain insights into what readers want to know and to involve them, ask for input, article suggestions, and submissions. Be sure to acknowledge any input you receive. Another idea is to randomly select a few members and call them for a brief interview about your newsletter or website.

Every organization should periodically take a readership survey. This can be included as an insert with a particular newsletter issue or sent as a separate mailer. (See the end of this chapter for sample questions.)

The following is a checklist of items to consider in managing the feedback process:

- Whenever possible, report back the results to survey participants.
- Look for feedback from meeting evaluations or from other surveys.
- Post questions on your website.
- For websites: make it easy for visitors to get in touch using “contact us” e-mails.

## **EXECUTING PROFESSIONALLY**

### **Writing—A Review of Fundamentals**

- Be sure your news stories cover the facts. Check for who, what, when, where, why, and how.
- Use short sentences—15 to 20 words is a good guideline.
- Use short paragraphs; this visually makes your newsletter more inviting to read.
- Use common language. Avoid unnecessary jargon, technical terms, and academic-sounding language. Spell out acronyms in the first reference.
- Use action verbs and the active voice.
- Assume readers may not read the entire article. Put the most important information at the beginning.

- Vary the length of the articles.
- Incorporate summary boxes in feature articles.
- Use checklists, bulleted lists, and call out quotation boxes to help break up long articles or pages with a lot of type.

### **How to overcome writer's block**

- Start with the headline. Don't try to make it perfect. A working headline will help you focus.
- Dive into your article and plan to go back to it later. As with the headline, don't fret too much about getting your opening sentence or paragraph exactly right in the first draft. No matter how long you spend creating it, odds are that you—or someone else—will edit it later.

### **Tips on grammar and usage**

- Use the grammar checker in your word processor. While neither comprehensive nor foolproof, it's potentially helpful.
- If you don't already have one, select and regularly use a grammar handbook.
- Use a style guide. One of the most popular is the *Associated Press Stylebook*.
- Select a standard dictionary as part of your style guide. One common choice is the *Webster's New World Dictionary*.
- Develop a style guide for your own organization. For example, do you prefer "Annual Meeting" or "Annual Convention"? Decide what words you will hyphenate, capitalize, and the like. Develop standard formats and spellings for jargon and technical terms.
- Avoid sexism in language.
- Consistently work at the finer points of style. For example, know how to properly display service marks and trademarks. Example: Realtor®

### **Tips on proofreading**

Ideally, have three outside proofreaders review your document for these different areas:

- Grammar and language.
- Content accuracy about the profession and your organization.
- Political sensitivity about issues in your profession and organization. This proofreader should have a feel for how an article will be perceived by rank-and-file members, leaders, and other segments of your readership. Look for someone who can spot who or what has been left out as readily as what was mistakenly left in.
- In addition, your review team should include someone with an eye for graphics, photo selection, layout, and overall appearance.

### **What You Should Know About Graphics**

The best rule of thumb is to keep your design simple and readable. Avoid clutter. Strive to have the design reflect who you are as well as to whom you are speaking. A consistent, familiar image is the foundation of a powerful identity.

### **Tips**

- If you don't have access to a desktop publishing system or someone who has experience in design and layout, consider using software templates.

- Learn about typefaces, fonts, and layout techniques.
- Identify common found elements and styles in professionally produced pieces that you can incorporate in your publication.

## Resources

If you don't have the resources you need to prepare a newsletter, you may want to consider contacting:

- Universities, community colleges (faculty and/or students)
- Graphic design firms
- Colleagues in ASHE

## HOW TO AVOID LEGAL PITFALLS

You should be aware of the following legal pitfalls that could potentially expose your chapter to liability:

- **Libel (injury to reputation):** Insist on accurate and fair reporting.
- **The right to privacy:** Always obtain signed releases before publishing photographs.
- Copyright (the right of authors to control the reproduction and use of their creative expression that have been fixed in tangible form): Secure permission before using materials or artwork from a published source.
- **Antitrust:** This complex body of law prohibits any concerted action that unreasonably restrains competition. Among actions clearly prohibited are: conduct involving horizontal agreements to establish prices and entering agreements to refuse to deal with third parties or to allocate markets or limit production.
- **Advertising:** Put in writing your policy about what you will and will not accept. Use signed contracts for ad space.
- Consider publishing a legal disclaimer in each issue or for your website content.

## BUDGET BASICS AND TIPS FOR COMMUNICATIONS

Establish a budget for expenses and revenue prior to publication. The way you produce your newsletter (i.e., two-color vs. one-color, number of pages, etc.) and even the way it's folded for mailing can have major cost implications. Following are some tips for managing expenses and revenue:

- Be innovative. Paper, printing, and technology are always changing. Keep in touch and ask questions of your outside vendors.
- If you need help with postal matters, such as how your newsletter should be folded to incur the least amount of postage, consult the United States Postal Service.
- To generate income, consider periodically running business card listings.
- Mail to advertising prospects several times a year. Announce your ad deadline schedule well in advance.
- If you sell advertising as a regular part of your publication's operation, determine your editorial-advertising ratio. Use the ratio as a guide, not a firm rule.

## **A CHECKLIST FOR NEWSLETTER PRODUCTION AND PLANNING**

The following checklist can help you manage the production and planning aspects of your newsletter:

- Do you have established deadlines and stick to them?
- Do you have a tentative editorial calendar for the year?
- Do you have writing guidelines for authors?
- If your publication has photos and graphics, do you ask authors to contribute?
- Do you put the author's contact information at the end of the article?
- Do you get credit when something in your publication is copied and shared? (Tip: put the page number, date of publication, and name of your publication on every page, so if the page is copied and shared, your organization will get the credit.)
- Do you have a table of contents to highlight what's inside each issue?
- Do you publish an annual index to articles?
- Do you insert a request for updated member contact information with a box including address, phone, and e-mail changes?
- Do you use recycled paper? Some of your members view this as very important. Some organizations use recycled paper but forget to let readers know.

## **INNOVATING AND ADAPTING IN A FAST-CHANGING WORLD**

Following are some suggestions for getting your communications vehicle off the ground and keeping reader interest:

- Develop a formal or informal advisory committee.
- Keep an ongoing idea file containing examples of other newsletters and article ideas.
- Read a variety of publications, including several outside your field. Examples: *Fast Company Magazine* and *Hospitals and Health Networks*.
- Feature a lively and regular president's column.
- Make up a quiz. Invite readers to send in their answers by a certain date. Everyone who gets a certain score can be entered in a drawing for a prize. Print the answers—and winners' names if you offer prizes—in a future issue. Or put them on your website to help build traffic.
- Look for ideas on content (plus layout and graphics) from a variety of resources.
- Focus on fitting and adapting ideas from others, not copying them.
- Consider creating a special issue that can be sent to non-member audiences, such as:
  - Non-members (including former members who have dropped)
  - Retired members
  - Local media

- Opinion leaders including local political leaders, libraries, and universities
- Administrators of health care facilities
- Look before you launch—experiment, test prototypes, and create pilot programs. Gather feedback. Then refine and improve.
- If you are making big changes in the format or frequency of the publication, let your key audiences know. This includes your leadership, readers, and advertisers. Tell them about the benefits of the changes you're making and ask for their feedback.
- Grocery checkout line magazines often live and die on the power of their front pages to jump off the rack and into the hands of buyers. Whatever style you select for your cover or front page, the goal is to be visually interesting and entice readers.
- Involve readers with quick surveys. Provide instructions and then report the results.

### **Do's and Don'ts for E-mail Newsletters**

As e-mail volume grows dramatically, electronic newsletters must do more to stand out. Regarding format, weigh the blandness—yet universal ease of use—of plain text against the risk that color, graphics, and design elements could come up as gibberish on systems that do not support HTML mail.

#### **Tips**

- When determining frequency, stay tuned to member feedback. For most people, daily is probably annoying unless you offer vital information.
- Avoid indents and long lines. This will cut down on awkward line breaks and will make the web page easier to read.

## **DEVELOPING A CHAPTER WEBSITE**

A complete manual could be written on chapter website development. For the purposes of this section, only the basics will be covered—items you need to consider as a volunteer committee or board.

There are many valid reasons to develop a website for your chapter. Some chapters use their sites solely to publish chapter communications and post upcoming meeting information. Other chapters have embraced their website as a full-fledged membership service. Monetary resources and, more important, resources for maintaining the content on the website, usually dictate the degree of complexity.

### **Put Your Best Face Forward**

Your website showcases your chapter. It may be the first place someone goes when they are seeking information on joining your organization. Make sure it's user-friendly to both members and non-members. Try to put yourself in the user's shoes and make it easy for someone to find the information they need.

### **Organize Your Site**

Try to apply the “keep it simple, stupid” or KISS principle. It's very easy to get carried away when determining what buttons to include on a home page. Everyone will have their own opinion and territorial issues about what should be on the home page and what should not.

Begin by looking at what other chapters and ASHE include on their home page. The Affiliated Chapters section of the ASHE website provides a link to chapter websites, if the chapter has provided a link.



Next, make your list of major buttons and home page contents. Try to narrow your buttons down to no more than seven or eight. Suggested buttons might include:

- About (Your Organization Name)
- Career Opportunities
- Chapter Meetings and Calendar
- Communications
- Membership Information
- Members Only
- Awards
- Links

In addition, you may want to consider including more minor buttons or information (usually located at the top or bottom of the page), such as:

- Search
- Site Map
- Who to Contact
- Date of Last Update
- ASHE Logo and link to the ASHE website with the words “An Affiliated Chapter of the American Society for Healthcare Engineering of the American Hospital Association.”

Following are additional suggestions on content to include on each of these pages.

### **Suggested “About (Your Organization Name)” Contents**

- Vision/Mission
- Subchapters, if any
- Board of Directors
- Committees
- Bylaws
- History
- Affiliation Status with ASHE (Gold, Silver, or Bronze Chapter of ASHE)

### **Suggested “Chapter Meetings and Calendar” Contents**

- Calendar of Meetings
- Meeting Notices
- Meeting Minutes
- PDF of brochure or content related to a major conference
- Provide a link to the educational programs calendar on the ASHE website

### **Suggested “Communications” Contents**

- Letter from the President
- Newsletters
- Alerts
- Announcements

### **Suggested “Membership Information” Contents**

- Who Should Join

- Membership Features and Benefits—features tell the reader what they receive; benefits indicate what your chapter does for them
- Membership Application
- Who to Contact for Membership Questions

### **Suggested “Members Only” Contents**

- Membership Directory
- Bulletin Board
- Job Opportunities in your local area or the latest issue of ASHE Career Flash

### **Suggested “Awards” Contents**

- Awards nomination information and forms
- Announcements regarding award winners, including chapter award winners and ASHE members in your chapter who need to be recognized
- Link to the Certified Healthcare Facility Manager website of the American Hospital Association Certification Center (a link to the Center can be found on [www.aha.org](http://www.aha.org))

### **Suggested Links to Other Organizations**

- ASHE website ([www.ashe.org](http://www.ashe.org))
- Local authorities having jurisdiction
- State/Local hospital association
- The Joint Commission
- American Society of Heating, Refrigerating & Air-Conditioning Engineers
- The National Fire Protection Association
- National Safety Council

### **Writing Tips for the Web**

- Do not assume that what works in print will work equally well on the Web. Posting a document on your website in a PDF format is acceptable. Do not, however, take documents such as brochures that were written and designed as print pieces and post them as is on your website.
- Web users expect brevity. This means Web articles have to be shorter than written copy. Avoid big words, long sentences, and fluff. A rule of thumb is to keep Web articles to half the length of printed pieces.
- Web users skim, click, and move on. To help them, use lots of subheads and bulleted lists.
- Whenever possible, provide hyperlinks.
- While the Web is different from print, copyright law is the same for both. For example, you cannot simply paste someone else’s text or graphics on your website without permission.
- Contact ASHE if you wish to post copyrighted ASHE material (non-marketing materials) on your website. In most cases there should be no objection, as long as ASHE is given full credit.

### **Determine Site Development/Administration Responsibilities**

Your first decision will be determining who will design and host your site.

- Does anyone in your chapter have an interest in website design?
- Is there a university or college nearby that teaches website design? Students may be looking for an opportunity to add to their design portfolio.

- Is there a local or nationally based web design (and sometimes hosting) service you might use?
- Find out how other chapters designed their site and where their site is hosted.

Make careful decisions in this area. If your website designer or expert leaves or moves, you may be in trouble. With a service provider, you may have more staying power.

Next, determine who will be responsible for updating your site. Can you update it yourself, or do you need to work with your web host or designer? It's highly recommended that your site be updated at least monthly.

## **Budgeting Basics and Tips for a Website**

### **Expenses**

The cost of developing and maintaining your website will vary greatly depending on factors including design complexity, kind of content (e.g., bulletin boards require more programming than text-only content), and the amount of content to be maintained. A page that offers the user interactivity demands a greater amount of programming and will be more expensive. Photos and graphics also add costs.

Items that may need to be budgeted include the following:

- Design
- Encryption (if you wish to conduct e-commerce using credit cards)
- Hosting
- Maintenance contract
- Special programming, if required
- Domain registration—Don't be overcharged. Many companies advertise low prices but then charge extra for critical add-ons. In many cases, these add-ons cost more than your initial name.

### **Income**

Don't forget about the opportunity to generate income, either by offering sponsorship or online advertising space or by selling listings in an online directory of buyers. Be prepared, however, to deliver traffic to your site. Online advertisers and sponsors will want information on site traffic to justify their expense.

The way website advertising generally operates is that the advertiser will place a small banner advertisement on your site and will pay you either by click-through, impression, sale, or some combination of the three. A click-through occurs when a visitor to your site clicks on the advertising banner and is taken to the advertiser's site.

### **Tips on Design and Graphics**

- Try to keep any images under 40 kb, or your members may not be able to quickly download your website.
- Be consistent in the use of fonts for headlines and text. Don't use too many different fonts.
- Don't make a single page too long. Users won't want to scroll down too far. Make liberal use of links and sub-pages.

### **Launching Your Site**

A soft launch of your website will allow you to test links and make sure all pages load correctly. At this point, the site will only be available for your eyes or the eyes of volunteers (i.e., board or committee) responsible for directing its development.

Once you are ready for the official launch, make sure your members anticipate it and promote traffic through e-mail messages with a link to the site. You will also want to include your URL on all your brochures, business cards, newsletters, and program announcements.

## **Gathering Feedback**

To keep your site from becoming stagnant and to increase traffic to your website, periodically gather feedback from your membership on its value, satisfaction, and reliability.

Membership feedback can be accomplished in several ways, including through membership surveys, online surveys, and a feedback button on the home page of your website.

It's also helpful to test drive the site with the following thoughts in mind:

- How easy is it to use, navigate, and search?
- How simple is it to contact your organization with questions?
- Do you post your e-mail address, phone, fax, and mailing address?
- Do you keep your website fresh and interesting?
- Does what's new on your site jump out to visitors?
- Is it interactive—in other words, do you ask for feedback, opinions, and sharing of ideas and information?
- Are pages easy to print?
- Do the hyperlinks work? They might have been fine the day you added them, but the Web is dynamic, and sites change and disappear every day.

## **Chapter 10**

### **EFFECTIVE ADVOCACY PROGRAMS**

#### **Grass Roots Advocacy and the Chapter Advocacy Liaison**

***This chapter addresses the following topics:***

- Overview
- ASHE National Advocacy Program
- Grass Roots Advocacy
- Chapter Advocacy Liaison

## OVERVIEW

“The code says I have to do what?” “Do you know how much that is going to cost?” “Who writes these things?” “Do they have any idea how things work in the ‘real world’?”

Do these scenarios sound familiar? You may have had these or similar thoughts when faced with complex code compliance and shrinking compliance budgets. Codes, standards, and guidelines provide a valued and needed service to ensure safe and effective design, construction, and practice. Unfortunately, some of these codes go too far in addressing a problem and become problems themselves, particularly if outside interests see an opportunity to influence and exploit a code for economic gain.

### Who Protects Your Interests?

Many ASHE members serve on national committees to provide expert opinions on proposed code revisions and proposed new codes that affect the daily functioning of health care facilities. This ongoing representation is critical to ensure that codes are based on scientific principles and empirical data, rather than on anecdotes and lobbying by special interest groups seeking competitive advantages that add little or no safety value.

Through the process of advocacy, ASHE members have caused obsolete standards to be repealed and performance-based standards (based on actual safety outcomes) to be adopted.

However, ASHE’s Advocacy Program is not about saving money at the cost of safety. It is about intelligent interpretation of existing codes to ensure the most cost-efficient means and methods to meet the letter and intent of the codes, allowing for cost-effective safety management. Advocacy also extends to analyzing and influencing code revisions and the adoption of new codes.

## ASHE NATIONAL ADVOCACY PROGRAM

**ASHE is an effective force for change** because it provides a unified voice for more than 12,000 members nationwide—a formidable force to be reckoned with. But accurately representing you, the person who must work with these codes on a daily basis, is the key to meaningful change. This change starts on the grass roots level. When you share your concerns about existing national codes, review proposed changes, and offer comments, ASHE can better keep you informed of changes and accurately reflect your views and opinions to enact meaningful regulatory relief and real change.

## GRASS ROOTS ADVOCACY

ASHE is establishing a **Grass Roots Advocacy Program** through its affiliated chapters to keep members current on proposed new regulations and codes revisions and solicit their valuable feedback on needed changes. When you stay up to date on codes that are of most interest to you, ASHE can voice your comments and proposed changes in a coordinated and effective effort.

The key to staying current on the issues is strong two-way communication between Grass Roots Advocates in the field and the ASHE Advocacy Committee. The key to effective communication is selecting an [Advocacy Liaison](#) for your chapter. The Chapter Liaison is the point person for identifying local issues and acting as a conduit for two-way communication with the Advocacy Committee. These liaisons bring organization to the seemingly chaotic process of code creation, revision, and enforcement.

## CHAPTER ADVOCACY LIAISON

A liaison, appointed or elected by the chapter, receives timely information from the ASHE Advocacy Committee on current issues and proposed code revisions. The Liaison is charged with disseminating this information to chapter members and then providing feedback to the Advocacy Committee to establish ASHE positions on issues and craft arguments that support these positions. This may happen through a straw poll of chapter members, formal commentary, and even a letter-writing campaign.

The Chapter Advocacy Liaison is the conduit between the Chapter and the ASHE Advocacy Committee. Specifically, the Liaison:

- **Disseminates standards revisions.** The Liaison receives information through Advocacy Alerts, ASHE News, issue briefs, position papers (pros and cons), and talking points from ASHE via e-mail, online at the ASHE website, or through quarterly correspondence, and disseminates this information to chapter members.
- **Conducts straw polls on issues.** The Liaison conducts straw polls among members to determine support for or objections to a proposed regulation. This reality check ensures that ASHE truly represents the opinions and views of frontline health care engineers and managers.
- **Organizes review and comments.** To proactively influence the issue, draft language must be reviewed and comments (in support or opposition) submitted. The Liaison works with chapter members to select areas of interest for their review and then solicits their feedback on national issues (exchange of knowledge).
- **Forwards issues to ASHE for analysis and action.** Often national issues begin as state or local issues. The Liaison is encouraged to organize and submit chapter advocacy issues to the ASHE Advocacy Committee for review, analysis, and potential action.
- **Writes letters.** On some national issues, the most effective comment and influence is through an organized letter-writing campaign. The Liaison will be asked to disseminate talking points and letter templates to chapter members, and will encourage timely submittal of comment letters to the appropriate agency.