



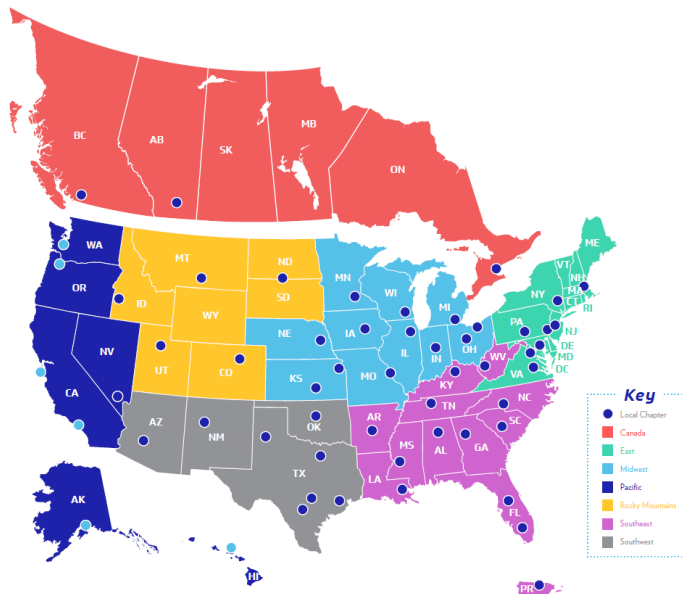
## Chapter Leader General Onboarding

Welcome! Thank you for your time, talent, and commitment to HIMSS and your chapter as a volunteer leader. We are pleased to have you onboard! HIMSS staff and the Chapters Task Force is here to support you on your journey as a chapter leader.

Questions? Contact your HIMSS chapter manager or [chapters@himss.org](mailto:chapters@himss.org).

[Angie Claypool](#) for: Canada, Pacific, Southeast, and Southwest Chapters

[Carrie Simon](#) for: East, Midwest, and Rocky Mountains Chapters



### Chapters Task Force

The Chapters Task Force is responsible for providing support and guidance to HIMSS chapters. The Task Force assists HIMSS in achieving specific Chapter-related goals. The Chapters Task Force positively represents HIMSS and its chapters. Learn more about the [Chapters Task Force](#) and its members.

### About HIMSS Chapters

Chapters are HIMSS members' local connection to HIMSS. Chapters are responsible for providing local engagement opportunities to members through education, networking, and more. All individual HIMSS members receive one Chapter of Choice, with the option to add additional chapters to their membership for \$39 per year.

### Chapter Engagement Stats

- [55 North American chapters](#)
  - Over 70,000-chapter members
  - Over 750 chapter leaders
- Annually, chapter events produce:
  - 900+ hours of education
  - 600+ hours of networking

### **Chapter Requirements**

- Chapters must follow local state (where doing business), Illinois (where US chapters are [registered](#)), and federal association laws.
  - U.S. Chapters are individually incorporated 501(c)6 and are registered in Illinois. The Illinois Secretary of State Annual Report is submitted by HIMSS staff to keep the chapter incorporated in good standing as a nonprofit.
- Submit all components of [Accountability Reporting](#) on time.
- Comply with all [governance](#) documents (bylaws, affiliate agreement, policies and procedures).
- File federal taxes and update responsible party (US chapters with the [IRS](#)).

### **Chapter Leader Resource Area**

This online resource was specially designed to offer Chapter Leaders best practices to manage their Chapters. There are many helpful tools for all leaders including training webinars, request forms, program & policy templates, leadership essentials and much more. Chapter leaders can access by going to: <http://clra.himsschapter.org/>

### **Chapter Leader eNewsletter**

- Sent to all chapter leaders the 2<sup>nd</sup> Tuesday of each month.
- Confirm your subscription preferences in the himss.org member portal.
- If you unsubscribe from all HIMSS emails, you will not receive the eNews.
- Add [himss@emailhimss.org](mailto:himss@emailhimss.org) to safe senders list

### **Chapter Leadership Academy**

The HIMSS Chapter Leadership Academy provides ongoing training for chapter leaders to learn about HIMSS, the chapter program, and developing effective leadership skills.

Each session is around 5 minutes to allow chapter leaders to learn at their own pace. Sessions are continuously added and updated on the [Chapter YouTube Playlist](#).

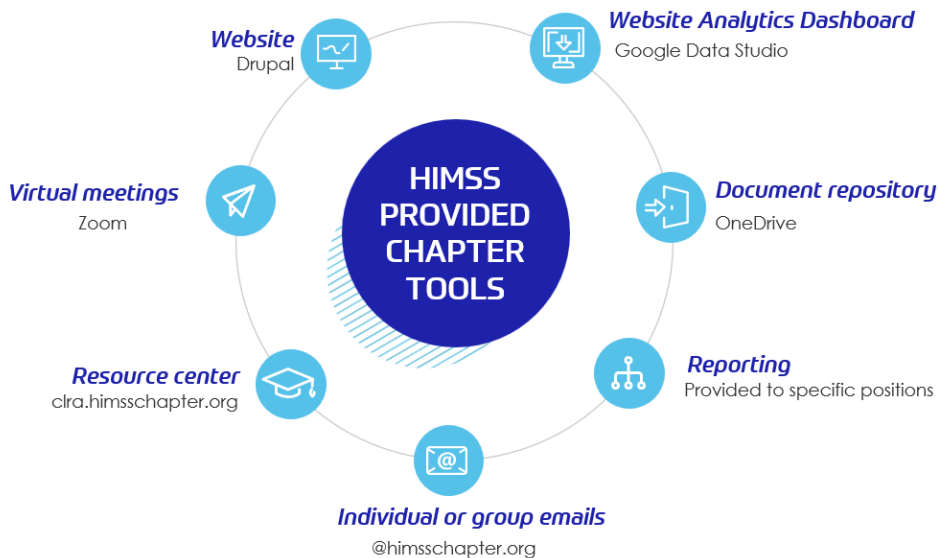
### **Frequent Action Items:**

- **Chapter events:**
  - Using a HIMSS site: Post the event and it will automatically sync to the HIMSS events calendar.
  - Using an external site: Email event details to [chapters@himss.org](mailto:chapters@himss.org) to post on the HIMSS events calendar.
- **Chapter requests:** Submit [chapter request form](#) for collaboration approval, speaker assistance, or financial support
- **CPHIMS and CAHIMS CEUs:** Chapters are [preapproved to offer CPHIMS and CAHIMS CEUs](#) for all chapter education sessions.
- **Update chapter bylaws:** Contact your chapter manager to assist with the process.
- **Board changes:** Submit chapter board changes throughout the year to HIMSS staff.
- **Individual email changes:**
  - Log into [himss.org](http://himss.org) to update your membership email (used for communication & access).
  - Update auto forwarding of chapter emails through the instructions below.
  - Email [chapters@himss.org](mailto:chapters@himss.org) to update your email on a board group email.
- **Chapter email password or auto forwarding updates:**
  - [mail.himsschapter.org](http://mail.himsschapter.org) > username is the email address > password is set by current owner. Top right horizontal bars > settings
    - left column > change password
    - left column > incoming mail > change forwarding email addresses.

### **Quick Links**

- [Chapter Leader Resource Area](#)
- [Accountability Reporting](#)
- [Chapter request form](#) (collaboration, speaker, financial support)
- [HIMSS Brand Center](#)
- [Email portal](#)
- OneDrive – email [chapters@himss.org](mailto:chapters@himss.org) for individual chapter's link if tool is utilized.

## HIMSS Provided Tools



## Chapter Annual Checklist

This checklist is only a sample and chapter leaders should add additional action items specific to the chapter.

### **Q1 (July – September)**

- Submit [Chapter Board List](#) for Accountability Reporting | **Due July 1**
- Update [chapter email address](#) forwarding and board group email.
- Update chapter banking information and ensure a minimum of two signatories.
- Add updated chapter documents to OneDrive (or other document repository).
- Update IRS Form 8822B within 60 days after the election.
- Update web and social presence.
- Chapter leaders review [governance material](#), bylaws, role descriptions, and specific chapter processes.
- New chapter leaders utilize [Chapter Leader Development](#) resources (review handbooks/onboarding document and view [Chapter Leader Academy](#)).
- Host board kick-off meeting and/or [leadership retreat](#)
- Notify membership and stakeholders of new chapter board.
- Submit [Administrative Report](#) for Accountability Reporting | **Due August 1**
- Select a representative to attend Chapter Leader Exchange.

### **Q2 (October – December)**

- Submit [Financial Report](#) for Accountability Reporting | **Due November 1**
- US chapters submit [form 990](#) to IRS | **Due November 15**

### **Q3 (January – March)**

- Board meets to discuss election planning and develop timeline.

### **Q4 (April – June)**

- Adhere to chapter's [election](#) timeline for open call for nominations, election processes, and announcement of winners/non-winners.
- Submit new FY board list to HIMSS staff immediately following election.
- Host officer transition meeting.

### **Accountability Reporting**

To provide a high level of service and support to chapters and chapter leaders, HIMSS requires timely information on chapter events, initiatives, and communications. This information will allow HIMSS to promote chapter events, assist with program needs (speakers, financial, thought leadership, etc.), and ensure successful event production.

Refer to the completion guide and templates on the [CLRA Accountability Reporting page](#) for detailed information.

Submission components:

- **Board List**
  - Due July 1 annually
  - Recommend submitter – Secretary
- **Administrative Report**
  - Due July 31, 2024 (typically August 1)
  - Recommend submitter – President & Past President
- **Finance Report**
  - Due November 1 annually
  - Recommend submitter: Treasurer

## Chapter Leader and Staff Responsibility Breakdown

The below breakdown represents a high-level view of what HIMSS staff are responsible for and what chapter leaders are responsible for, along with links to relevant resources.

### Advocacy Resources

- [Chapter Leader Resource Area - Advocacy page](#)
- [HIMSS Public Policy Principles](#)

	Chapter	HIMSS Staff
<b>Organize and execute Advocacy Day and other relevant initiatives</b>	X	
<b>State/local/provincial advocacy and education</b>	X	
<b>Convene government stakeholders</b>	X	
<b>Volunteer for Chapter Advocacy Task Force leadership roles to support staff (2 year term)</b>	X	
<b>Offer advocacy trainings</b>	X	X
Advise chapters on advocacy tactics and government affairs through toolkits, monthly meetings, etc		X
Identify public policy focus areas and principles		X
Identify policy positions*		X
Support of chapter through public policy/advocacy trainings, presentations, attending legislative meetings, as available/necessary		X
Lead Chapter Advocacy Task Force efforts		X

*\*Chapters may craft advocacy asks which reflect HIMSS public policy principles. Chapters are strongly encouraged to consult HIMSS staff on advocacy positions and asks. If the advocacy positions do not reflect HIMSS public policy positions, chapters are required to contact HIMSS staff for pre-approval.*

## Communications & Marketing Resources

- [Chapter Leader Resource Area - Marketing & Brand Materials page](#)

	Chapter	HIMSS Staff
<b>Create and manage social accounts</b>	X	
<b>Determine newsletter content and schedule</b>	X	
<b>Determine email copy and schedule</b>	X	
Provide templates (PPT, Word, Flyers, Banners)		X
Provide logos and images		X
Determine brand governance and guidance		X
Approve swag design (contact the Chapter Engagement team for approval of proofs )		X

## Events & Education Resources

- [Chapter Leader Resource Area - Certification & Workforce Development page](#)
- [Chapter Leader Resource Area - Event Planning page](#)
- [Chapter Request Form](#) - Collaboration, Speaker, Financial Assistance

	Chapter	HIMSS Staff
<b>Provide education with CE credits</b>	X	
<b>Determine event topics</b>	X	
<b>Determine event schedule</b>	X	
<b>Determine event speakers</b>	X	
Collaborator approval		X
Provide Subject Matter Experts upon request		X



## Finance & Governance Resources

- [Financial report and budget templates & financial review guidelines and checklist](#)
- [Tax information](#)
- [Budget and planning best practices](#)
- [Governance and annual registration](#)

	Chapter	HIMSS Staff
<b>File taxes with the IRS (990)</b>	X	
<b>File taxes with the state and local gov</b>	X	
<b>File state and gov corporate business requirements (foreign entity filing)</b>	X	
<b>Annual financial review/audit</b>	X	
<b>Create financial report and budget</b>	X	
<b>Maintain bank account</b>	X	
<b>Enter into contracts</b>	X	
<b>Adopts and implements governance documents</b>	X	
<b>File and maintain EIN and W9</b>	X	
<b>File group tax exemption</b>	X	X
Collect membership dues		X
Wire transfer membership dues sharing to chapter		X
File annual report with IL SOS		X
Provide registered agent in the state of IL		X
Provide D&O insurance		X
Determines and provides governance structure and documents		X

## Membership Resources

- [Chapter Leader Resource Area - Membership page](#)
- Email for [OA sales](#)
- Email for general [membership support](#)

	Chapter	HIMSS Staff
<b>Individual</b>		
<b>Help Members with questions about Chapter Membership</b>	X	X
<b>Help Members with questions about Chapter Events</b>	X	X
Work with Marketing on outreach on Benefits of HIMSS Membership		X
Help Members with general questions about HIMSS		X
Day-to-day membership relations and customer service		X
Overall management of HIMSS Individual Membership		X
Assist Members with Membership Renewal		X

	Chapter	HIMSS Staff
<b>Corporate (CM)</b>		
<b>Educational/promotional outreach to vendors on benefits of Corporate Membership (CM) - recruit to join</b>	X	X
<b>Assist healthcare marketplace vendors with determining their optimal CM level</b>	X	X
Process CM renewals and distribute membership dues invoices		X
Onboarding of new CMs, monthly orientation for Gold/Platinum tier Primary/Secondary contacts		X
Monthly engagement communication on how to maximize membership value by utilizing exclusive membership benefits/services		X
Day-to-day client relations and customer service		X
Management of the CR team and CM program, policies, processes, benefits/services		X
CM Management: monthly Corporate Connection e-News, monthly educational/informational member exclusive webinars, monthly member engagement email, Global Conference projects (Focus Groups, Appreciation Breakfast, Lounges, comp codes, etc.), Primary/Secondary Contact management, benefits administration, manage allotment of HIMSS memberships (based on CM membership tier), member data management		X
Chapter Leader Support: direct CM inquiries regarding Chapter events/sponsorships to appropriate Chapter Leaders, provide best practices for CM engagement, promote chapter participation to CMs		X

	Chapter	HIMSS Staff
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<b>Non-Profit Partner (NPP)</b>		
<b>Encourage chapter members at relevant organizations to join the NPP program</b>	X	
<b>Serve as a resource for questions about chapter events and collaboration opportunities between chapters and NPPs</b>	X	
<b>Outreach to publicize the NPP program and attract relevant organizations</b>	X	X
Overall management of the Non-Profit Partner membership program		X
New member process, renewals, benefits, and membership questions		X
Promote chapter participation as a benefit of the complimentary individual membership		X

	<b>Chapter</b>	<b>HIMSS Staff</b>
<b>Organizational Affiliate (OA)</b>		
<b>Offer overview of how new members can get engaged in local events and volunteer opportunities</b>	X	
<b>Renewal assistance upon request</b>	X	
<b>Perform outreach to organizations to educate them on benefits of OA/AOA program and encourage to join</b>	X	X
Help organizations determine their optimal OA level		X
Sign renewal agreements and process invoice		X
Onboarding of new members and review of benefits		X
Reach out to organization PC to secure renewal		X
Day-to-day client relations and customer service		X
Overall management of the OA program, policies, processes, and benefits		X
Processes and Client Management: new client onboarding, OA renewals, invoicing for new and renewing clients, Global Conference registration, Primary Contact management, benefits administration		X
Chapter Leader Support: provide list of OA primary clients in chapter territory as requested, share best practices for OA engagement, promote chapter participation to Oas		X

## Chapter Brand Guide

## Marketing

- Chapters must follow the [HIMSS brand guidelines](#) and only use the logo provided to the chapter by HIMSS
- View and download branded templates (PPT, Word, flyers) on the chapter OneDrive site in the Marketing folder.
- For more information and templates, visit the [CLRA Marketing](#) page.
- [Brand center](#): has the full brand and style guidelines.

## Brand Guidelines

- [Writing Guidelines](#): This is your resource to draft copy in a focused tone of voice, so our content has a consistent sound, style and message.
- [Visual Identify](#): Correct use of our visual identity across all media grows brand equity by strengthening the connection between our logo and our mission.
- [Color Profile](#): A color profile must be accompanied by and applied to its brand elements consistently to create brand recognition.
- [Imagery](#): Discover guidelines for photography, video and various illustrations and avoid brand misuse.
- [Brand Management](#): Our architecture unifies the brand strategically and visually while providing autonomy and ownership for sub-brands and products.
- [Brand Architecture](#)
- [Aligned Brands](#)
- [Email Templates](#)

## Chapters Logo Guidelines

The Chapters identity is presented in two different ways. The primary logo is the standalone chapter logo. An additional variation uses the HIMSS parent logo in conjunction with the chapter name. The parent HIMSS logo should never solely appear on chapter materials. **The chapter should never create resources using the HIMSS parent logo or circle emblem.** The former Chapter logos should be retired from all Chapter materials.

### *Primary Chapter Logo | Standalone*

The standalone logo is the Chapter's primary logo and is used on swag, chapter event materials, PPT template, when presenting the chapter as a sponsor, collaborator, and for other items created by the Chapter.

**HIMSS**  
GEORGIA  
CHAPTER

**HIMSS**  
GEORGIA CHAPTER

**HIMSS GEORGIA CHAPTER**

### *Secondary Chapter Logo | HIMSS Logo & Chapter Name*

**Materials presenting this option using the HIMSS parent logo and Chapter name will be solely created and distributed by HIMSS.** Examples include banner stand signage, PowerPoint template, email template, email signature badge, Word template, etc.



GEORGIA  
CHAPTER



### **Marketing Materials**

If your chapter is looking for a specific template and do not see if provided, please contact your chapter manager.

### **HIMSS Chapter Name**

The naming format for all chapters is HIMSS XXX Chapter. Due to the length of some chapter names, pre-approved nicknames may be used. Chapters may not use other names outside the pre-approved nickname. The first mention of the chapter's name in any document, email, flyer, etc. must be the full chapter name (format: HIMSS XXX Chapter).

Please email [chapters@himss.org](mailto:chapters@himss.org) with any questions or to request nickname approval.