

# *Chapter Leader Onboarding*

July 16, 2024

# Chapter Engagement Team



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**General:** [chapters@himss.org](mailto:chapters@himss.org)

# *Overview*

- **Our Purpose**
- **Governance**
- **Requirements, Expectations & Policies**
- **Support & Resources**
- **Board Transition Best Practices**

# *Our Purpose*

# *Vision*

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

# *Mission*

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

# Membership Types

## Individual

- [HIMSS Regular](#)
- Chapter only, Student, Life/retired (cannot serve in leadership role)

## Organizational

[Organizational Affiliate](#) (unlimited membership for employees)

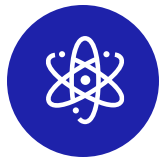
- *Utilize communication templates, facts sheets, and sign-up instructions from the CLRA for outreach*
- [Corporate Member](#) (# of memberships based on level)
- [Non-Profit Partner](#) (1 comp membership, additional may be purchased at discounted rate)

## Digital (does not include chapter)\*

- Access to news and resources (free for 1-year)

# The Value of HIMSS Chapter Membership

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



## Connect

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



## Learn

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



## Lead

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



# North America Chapter Engagement

BETWEEN JUNE 2022 AND JULY 2023

**55**  
HIMSS NORTH AMERICAN CHAPTERS



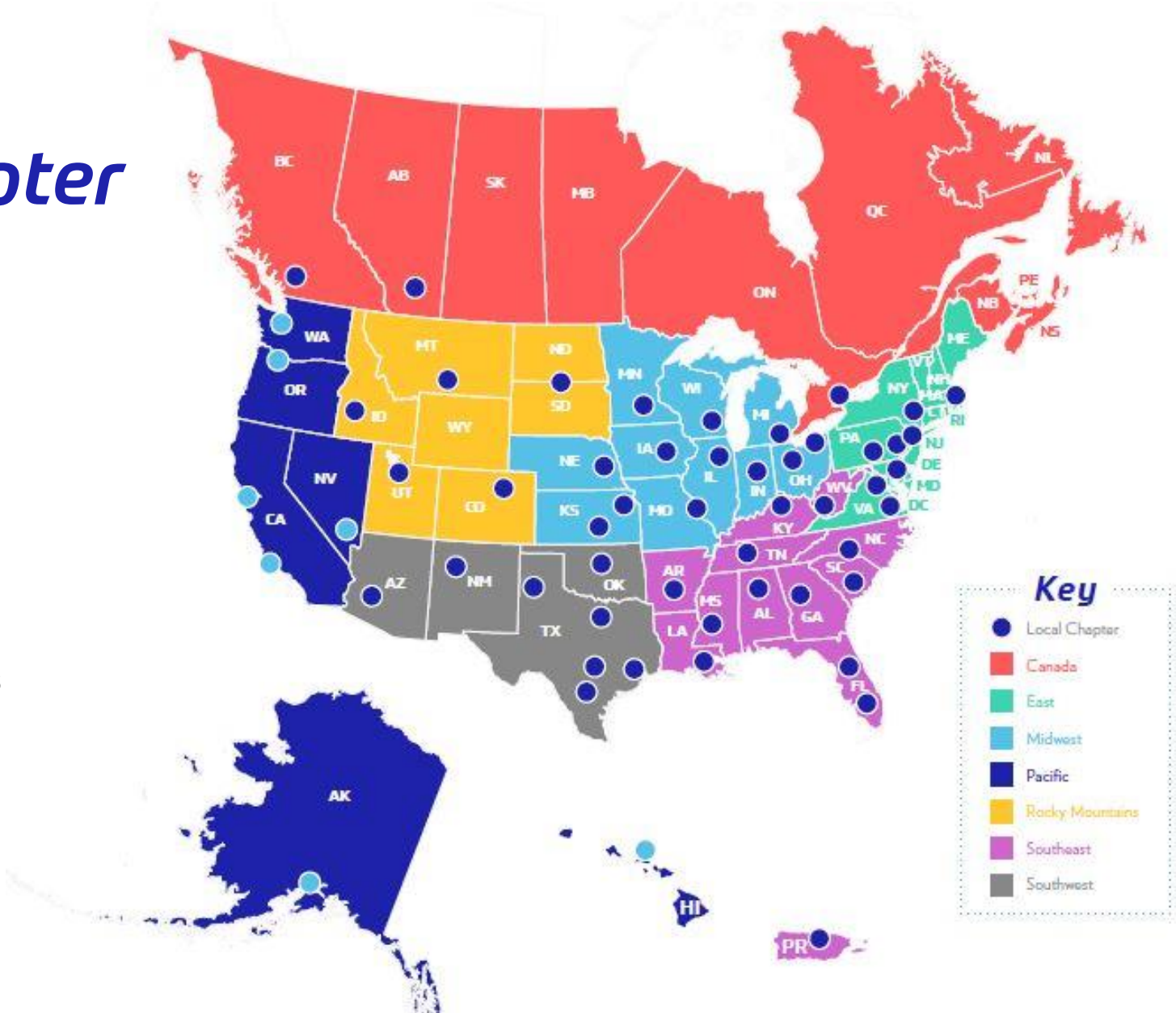
Networking Hours  
**600+**



Education Hours  
**900+**



Volunteer Leaders  
**700+**



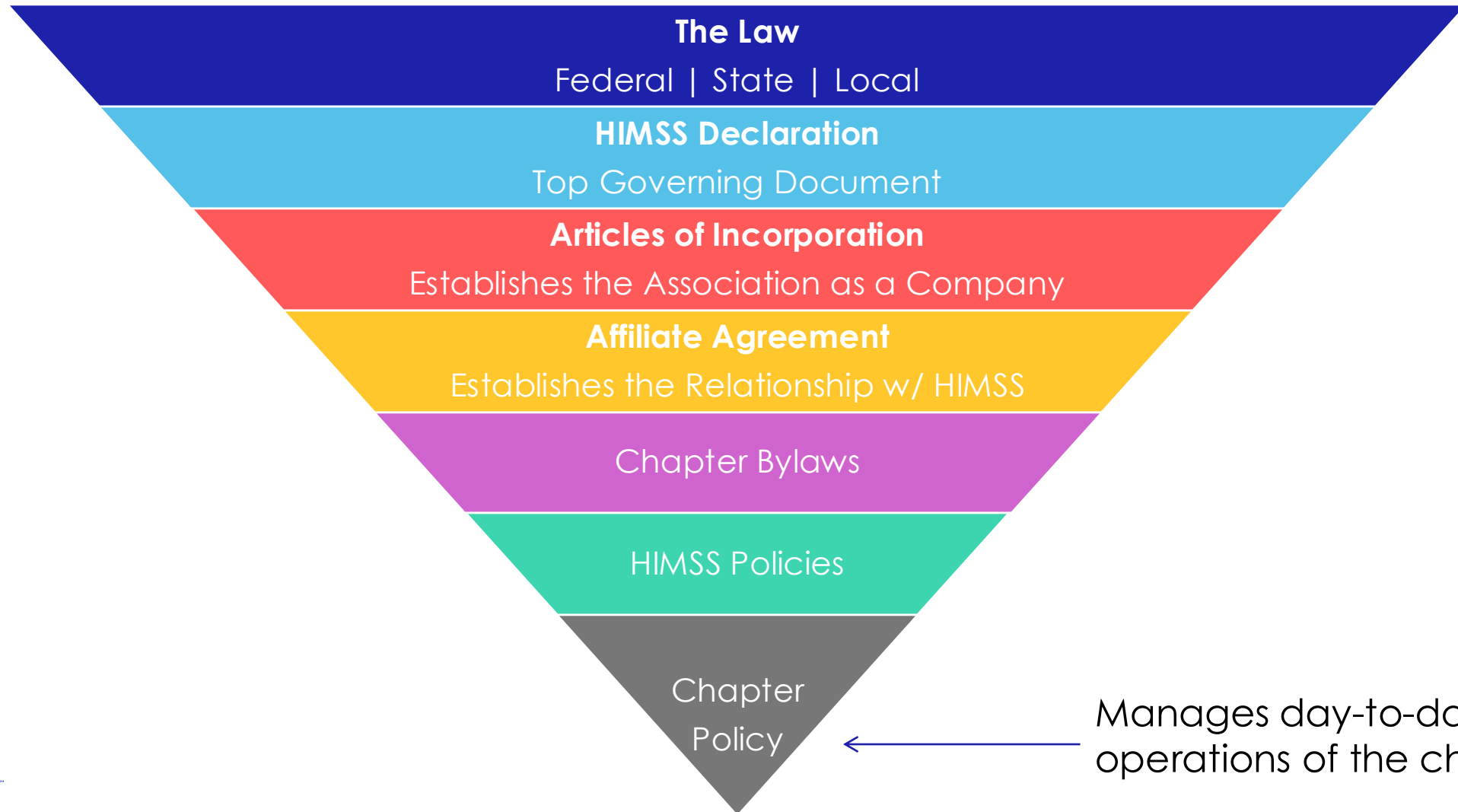
**Key**

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



# *Governance*

# Hierarchy of Governance



# Chapter Governance



## Incorporation

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



## Affiliate Agreement

- Defines relationship between HIMSS and the chapter



## Bylaws

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



## Policies and procedures

- HIMSS governed and enforced manual

# *Requirements, Expectations & Policies*

The infographic features a central dark blue circle with the text "Chapter requirements" in white. Surrounding this central circle is a light blue ring containing six circular icons, each representing a requirement. The requirements are: 1. Elect chapter board (paper airplane icon), 2. Provide education (graduation cap icon), 3. Communicate with members (@ symbol icon), 4. Perform organizational management duties that ensure a sustainable chapter (download icon), 5. Maintain governance in good standing (thumbs up icon), and 6. Active chapter board (person icon). Each requirement is accompanied by a short paragraph of text.

## Chapter requirements

### *Elect chapter board*

**Board members are elected** to their roles and the chapter is volunteer managed. Perform duties based on role. **Must be a HIMSS member.**

### *Provide education*

Chapters must host a minimum of **10 education hours per year** for members to provide CP/CAHIMS CEUs. Virtual or in-person.

### *Active chapter board*

Chapter board must meet a minimum of **4 times per year**. Board is responsible for short- and long-term planning to ensure a sustainable chapter.

### *Communicate with members*

Chapter must communicate with members a minimum of **4 times per year**.

### *Maintain governance in good standing*

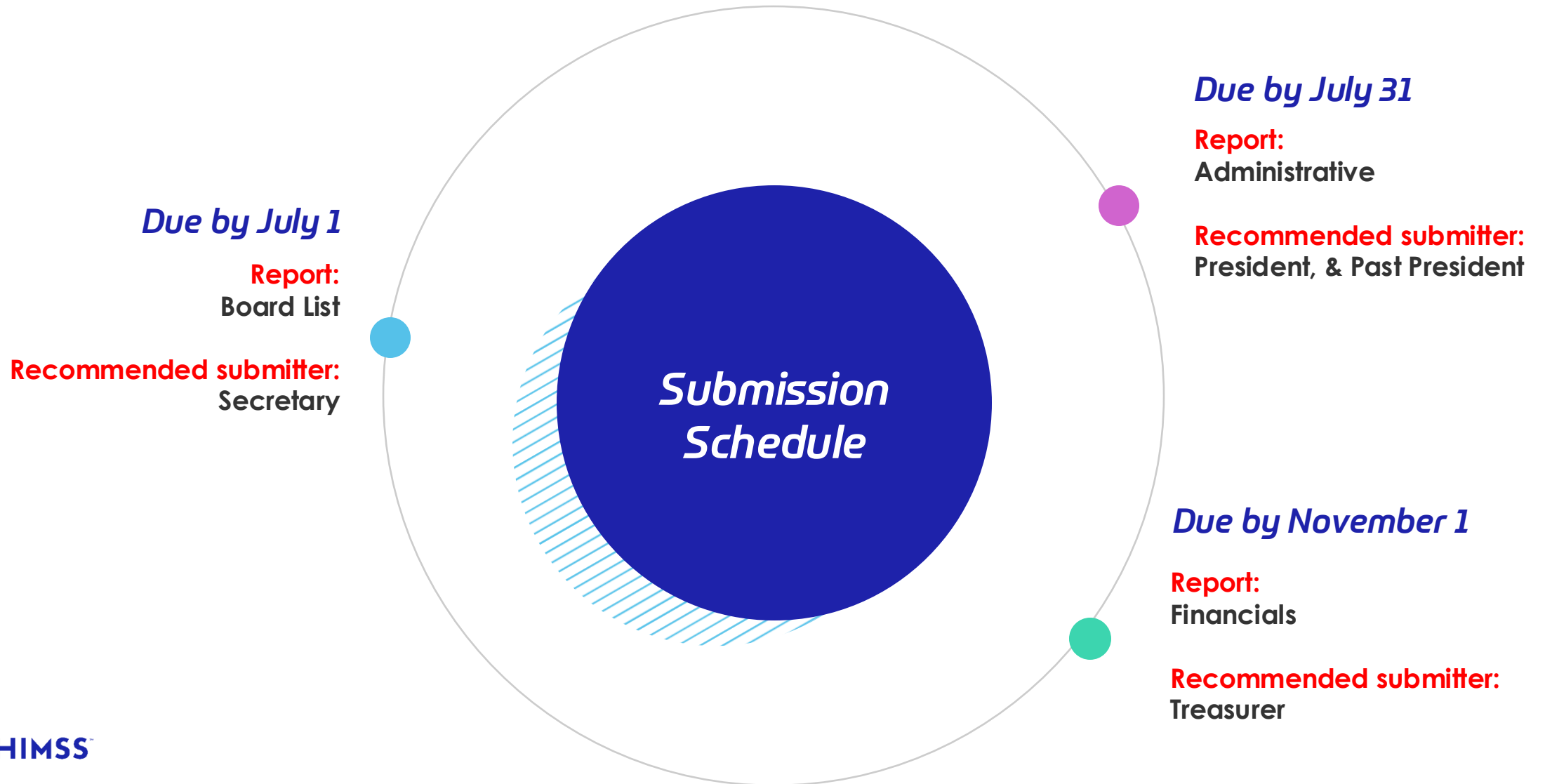
File federal and local taxes, follow HIMSS policies, bylaws, affiliate agreement, **maintain organization within the law and HIMSS.**

### *Perform organizational management duties that ensure a sustainable chapter*

**Maintain active org management** through website, reporting to HIMSS, financial audit and banking, manage tools, maintain documents, use correct branding.

# Accountability Reporting

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



# *HIMSS Chapter Governance and Policy Manual*

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

[clra.himsschapter.org/policies-and-procedures](https://clra.himsschapter.org/policies-and-procedures)

- **Within Manual**

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

- **Standalone**

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

Access the [YouTube playlist](#) video for a deep dive.

# Logo usage

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

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

*Please recycle all material that includes this logo.*

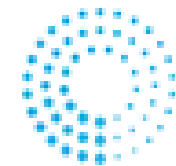
**This logo is approved with your chapter name included →**

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

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



**HIMSS**



**HIMSS**



# *Individual Chapter Policy Best Practices*



**REVIEW ANNUALLY**



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



**BOARD OF DIRECTORS VOTE TO MAKE  
CHANGES**

# Reminder: Make Volunteering Fun!

## Cultivate a welcoming environment



**Positively represent  
HIMSS and the chapter**



**Treat others with respect  
and be open to  
new/different ideas**



**Consider adopting a  
chapter volunteer code  
of conduct**

[clra.himsschapter.org/policies-and-procedures](http://clra.himsschapter.org/policies-and-procedures)



**Everyone is a volunteer,  
not an employee, they  
are dedicating their time  
to something meaningful**

# *Support & Resources*

July 16, 2024

# Chapter Support & Resources



## Resources and templates

Portal for chapter leaders only  
Samples, templates, how to's, trainings  
Role based handbooks  
Newsletter \ "must know" emails



## Guidance

Board and operations  
Chapters Task Force  
Chapter Advocacy Task Force  
Speaker search & requests



## Trainings

Monthly webinars and virtual networking  
Webinar recordings (YouTube)  
In-person training  
Chapter Leadership Academy (YouTube)



## Financial

Dues revenue share  
Educational event assistance



## Operational tools

Website + Analytics  
Document repository  
Reporting  
Individual and group emails  
Virtual meetings



## Governance

Bylaws & Affiliate Agreement  
Policies and Procedures



## Connectors

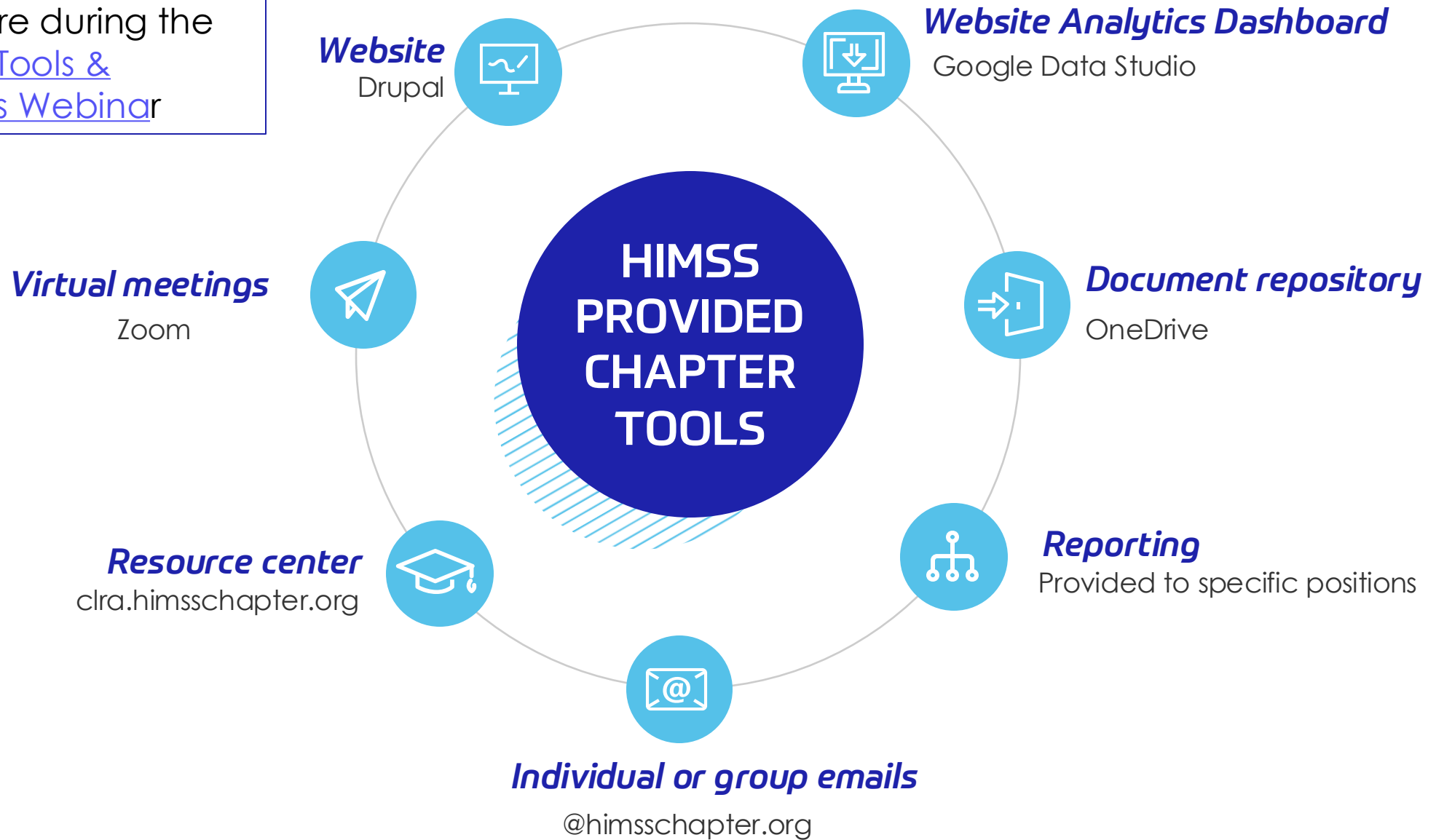
OA, CM, NPP  
Thought leadership  
Global Conference

# Chapter Leader Resource Area

- A chapter leader only portal
- [clra.himsschapter.org/](https://clra.himsschapter.org/)
  - First time logging in – we need to approve, email [chapters@himss.org](mailto:chapters@himss.org) (access denied is normal)
- Dedicated to providing you resources to make volunteering easier
- Let's help each other – share your helpful resources or provide feedback on improvements

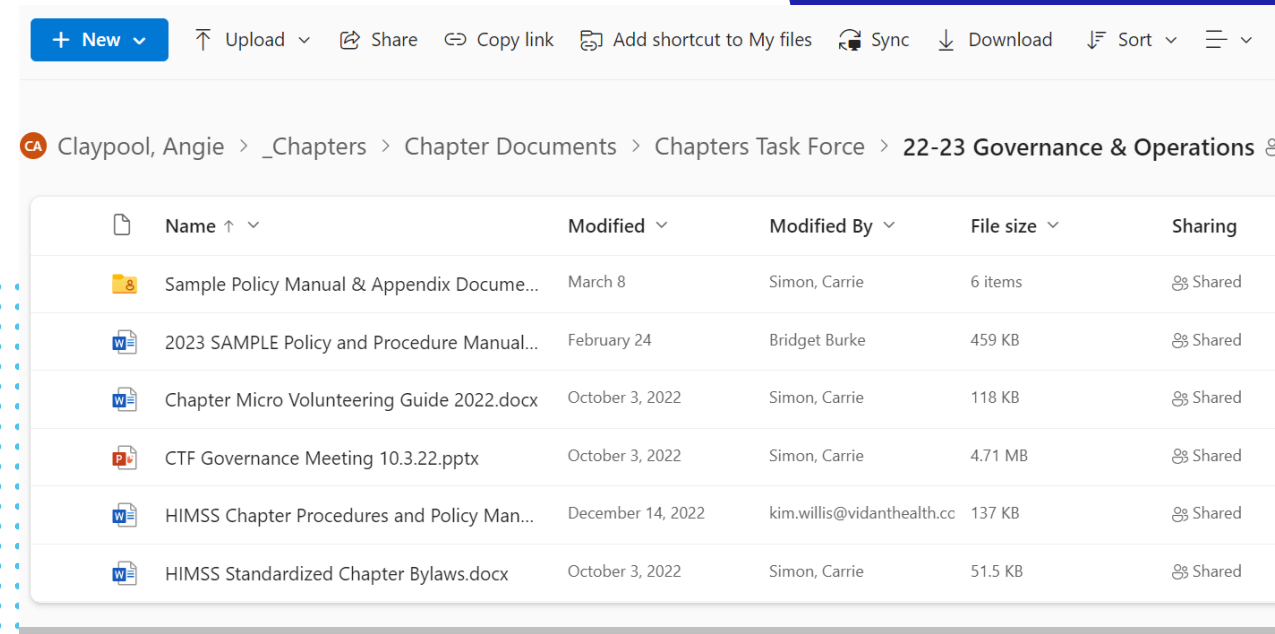
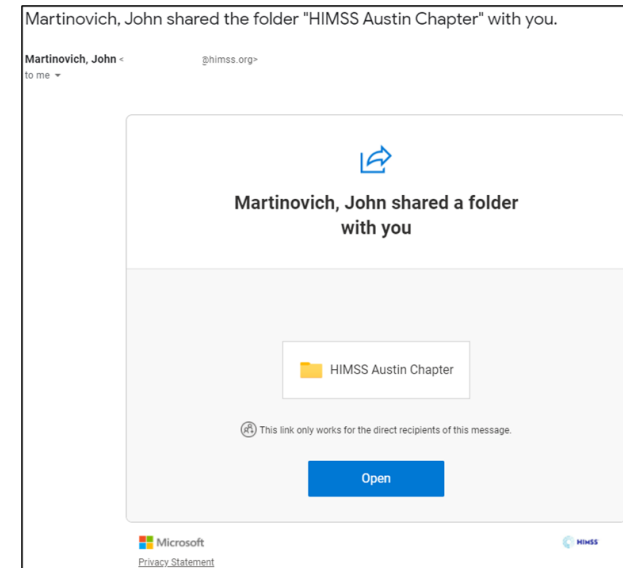
The screenshot shows the HIMSS Chapter Leader Resource Area website. At the top, there is a navigation bar with the HIMSS logo and links for 'About', 'Events & Education', 'Get Involved', 'Professional Resources', 'Chapter Foundation Materials', 'Chapter Leadership Essentials', and 'Tech Tools'. Below the navigation bar is a banner for 'Chapter Leader Academy' with a 'More >' button. The main content area is titled 'Chapter Leader Resource Area' and includes a 'Congratulations to the Bronze, Silver, and Gold Chapters!' message. Below this, there is a section titled 'Congratulations to our Chapters!' featuring four regional award logos for 2023: Midwest, Kansas, Iowa, and Eastern Canada. The 'Contact HIMSS Staff' section lists Angie Claypool (Director, Chapter Engagement), Carrie Simon (Manager, Chapter Engagement), and Evan Dunne (Government Relations). A 'Quick Links' sidebar on the right contains links for 'Accountability Reporting', 'Chapter request form', 'Marketing/boarding material', 'Policy manual', 'Webinar recordings and Chapter YouTube Playlist', and 'Advocacy & Public Policy'. Below the sidebar, there is a 'Best Practices To Engage Chapter Members' section with four numbered items.

Learn more during the [August 6 Tools & Resources Webinar](#)



# Document Repository - OneDrive

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



# *Chapter Reports*

- **Membership Roster\***
  - Identified leaders will have access to download as needed
- **Rebate Report \***
  - Emailed to specific leaders
- **OA Primary Contact Report**
  - Email your chapter manager as needed
- **Google Analytics Dashboard**
  - Accessible to those with link





# Website

- [Training Guide](#)

- **Best Practices**

- **All events must include the provided event images** that have the chapter logo with blue overlay (posted on OneDrive). You can request additional images.
- **Provide board contact information** (general email address) for potential members, event attendees, and potential sponsors.
- **Keep content up to date!** Regularly review content to remove outdated event or home page sliders. Review and edit (ex: spelling) content before publishing.
- **Do not list any individual staff or volunteer names/emails** or PDF's as those can easily become outdated.
- The previous chapter websites required navigation of certain pages that direct to himss.org and affiliate pages. Chapters are no longer required to have these links included in the chapter website navigation. All navigation was transitioned over in the current state.

Learn more during the [August 6 Tools & Resources Webinar](#)

The screenshot shows the HIMSS New England Chapter website. The header includes the logo and navigation links: About, Events & Education, Get Involved, Professional Resources, News & Publications, Sponsor Program, Sign In, and Search. The main content area is titled "Events & Education" and features a "New England Chapter of HIMSS Calendar of Events" section. Below this, there are two event cards: one for August 6, 2024, titled "NE HIMSS Premier Sponsored Webinar: Turning real-time data into actionable insights" and another for August 22, 2024, titled "2024 HIMSS New England Chapter Kickoff". To the right, there is a "Save the Date!" section with a list of upcoming events: Thursday, September 19, 2024 (Fall Networking Event), Thursday, October 17, 2024 (Digital Health Conference), and Wednesday, December 4, 2024 (Holiday Social). At the bottom right, there is a "Premier Sponsors" section with logos for AMDA, E Ink, InterSystems, Medtronic, Palo Alto, Proofpoint, and WOLF.

# *Certification*

**Chapters are pre-approved continuing education providers**

No paperwork or approval process for offering HIMSS CEUs.

CPHIMS

CPHIMS-CA

CAHIMS

CPDHTS<sup>®</sup>

FAQ document is a great resource!

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

# Communication

## Chapter Leader eNews

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

## Email updates

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

## Group emails

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

# *Event Support & Collaboration Requests*

Three reasons, one easy form



## ***Collaboration***

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



## ***Speaker***

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



## ***Financial***

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

# Logos and templates

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



# Chapter Advocacy

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

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

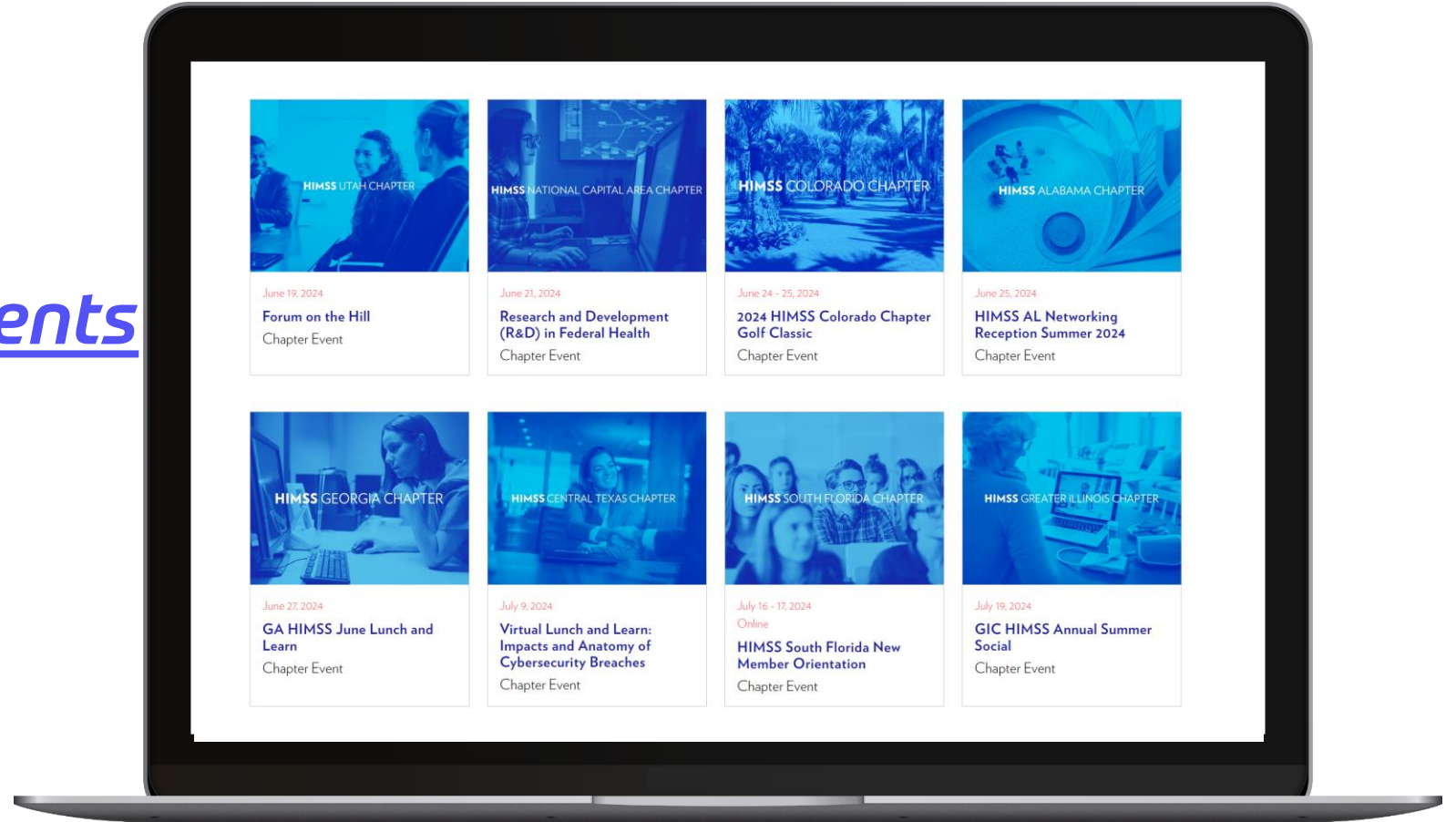
- Hold an Advocacy Day and allow your members to meet with their legislators
- Invite government officials, staff, and partners to chapter events
- Educate membership on advocacy priorities
- Recognize a government official for their contributions

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

# Chapter Events

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

→ Filter by Chapter Event



# Chapter Recognition

Opens 8/1/24

Submit by 11/1/24

Chapter Recognition for 2023-2024



## Bronze Level

- Chapters meet or exceed all expectations.
- Active chapter board that participates in educational trainings.

## Silver Level

- Chapters met Bronze level requirements.
- Submitted how they exceeded expectations in the areas of:
  - Member engagement and board management.
  - Outstanding events and initiatives.
  - HIMSS program promotion, member recruitment, and student outreach.
  - New member onboarding, board transition, financial best practices, and a committee structure that develops a volunteer pipeline.

## Gold Level

- Chapters met and submitted Silver level requirements.
- Submitted how they exceeded expectations and made a local impact with positive outcomes in the areas of:
  - Innovative programs and hosted events supporting Global Health Conference and Global Health Equity Week.
  - Volunteer succession plan, positive volunteer experience, goals to expand local membership, and strengthen relationships with OA's.



# *Board Transition Best Practices*

July 16, 2024

# *Onboarding Resources*

<https://clra.himsschapter.org/board-management>



**Onboarding manual**



**Short brand guidelines**



**Chapter vs staff  
responsibilities breakdown**

# Transition Next Steps

## Q1 Actions



### Submit

- Accountability Reporting: Board List (July 1)
- Accountability Reporting: Admin Report (July 31)



### Update

- Chapter email forwarding and board group recipients
- Chapter banking information and at least two signatories
- Responsible Party (IRS Form 8822B)



### Review

- Governance materials (Bylaws, Affiliate Agreement, Policy Manual)
- Chapter development resources and training sessions



### Notify

- Membership of new leadership
- Social media and web announcements

# Q & A

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

# Upcoming Events

July 25 | 12:00 – 12:30 pm CT

[Chapter Leader Office Hours \(Part 1\)](#)

July 30 | 2:00 – 2:30 pm CT

[Chapter Leader Office Hours \(Part 2\)](#)

August 6 | 11:00am – 12:00 pm CT

[Chapter Tools & Resources Training](#)

August 14 | 1:00-1:30 pm CT

[Chapter Leader Networking: Event Planning](#)

Sept. 16-17 | San Antonio, TX

[Chapter Leader Exchange](#)

Registration opening this week!



# Best Practices To Engage Chapter Members

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

1



2

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



3

REGULARLY ENGAGE WITH MEMBERS THROUGH EMAIL AND SOCIAL MEDIA CHANNELS.



4

REGULARLY ENGAGE IN MEMBER RECRUITMENT AND RETENTION EFFORTS.

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

5



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