



# Chapter Requirements

This section provides information on the requirements to establish a new chapter and receive provisional recognition, move from a provisional to a full status chapter, and how to maintain your full status once received.

## Applying to Become a Chapter

In order to be recognized as a Full Status chapter of SHM, chapters must first apply for provisional recognition. This is achieved by meeting the provisional recognition requirements and submitting an application to the National Office for review and approval.

## Provisional Recognition Requirements

### Leadership

Identify at least two founding members who agree to be responsible for formation responsibilities and who are current members of SHM. (Formation responsibilities are described below in this section.)

### Define Chapter's Geography

Determine what geographical area of hospitalists your chapter will represent. SHM's existing chapters are made up of statewide, city/metro area and multi-state chapters (see below). Chapters with large geographical representation should rotate locations of meetings and designate hospitalists from multiple institutions/locations to sit on the Chapter's Leadership. Please see below for more information on chapter geography.

- a. Statewide Chapter: represents all members within state borders.
- b. City/Metro Area: represents members within one specific metropolitan area. Provide a list of counties for defined geography.
- c. Multi-State: represents members within more than one state. It does not necessarily need to represent entire states. Provide a list of counties for defined geography.

### Meetings

Chapters are required to hold a minimum of two meetings per calendar year that are open to all SHM members in your chapter. Please see below for more information on what constitutes a chapter meeting. You will be asked in your chapter application to submit a work plan for the first year, listing when you plan to hold your meetings, potential topics, ideas for outreach and overall goals for your chapter.

### Demonstrated Interest

Have a petition signed by at least 10 hospitalists from a minimum of two institutions. See Appendix V for example petition.

# Receiving Provisional Recognition

Once your application and ancillary information to start a new chapter has been received at the National Office, staff will take the following measures to establish your chapter formally as a provisional SHM chapter:

## Application Review, which includes:

- **Founding Leaders Membership Verification:** Staff will verify that all hospitalists listed within the application are current dues-paying members of SHM. Anyone who is not an active member will be contacted by Staff to join SHM or renew their membership. The application will not move forward until all leaders listed have an active membership.
- **Geography Review:** Staff will ensure that the proposed chapter geography does not overlap with any existing chapters and falls within only one district. If there is overlap with an existing chapter, Staff will consult with the Chapter Leaders to determine which chapter better serves that area.
- **Meetings:** Staff will ensure that your work plan includes two meetings for the upcoming calendar year.
- **Demonstrated Interest:** Staff will review the petition for 10 signatures from hospitalists at a minimum of two institutions.

## Approval Notification

Staff will notify the founding leaders listed on the application that their application for Provisional Recognition has been approved or requires revision based on the requirements above.

## Once Approved:

Staff will take the following measures to set up your chapter as a formal Provisional Chapter:

**Chapter Roster:** All members and non-members (prospects) who are within the geographical bounds of your chapter will be assigned to your chapter and a roster will be formalized. All promotional emails for meetings will be sent to your chapter roster by the National Office. In some cases, emails may only be sent to SHM members on your roster (e.g., information about elections).

**Set Up Reserve Account:** The National Office manages a reserve account for every chapter. This is where all revenue will be deposited and expenses withdrawn. Please see Finances section on [page 20](#) for additional information.

**Chapter Information on HospitalMedicine.org:** Your chapter will be listed on the SHM chapter page listing for your home state and neighboring regions if applicable. Visit the SHM Chapters page at [hospitalmedicine.org/chapters](http://hospitalmedicine.org/chapters).

**Chapter Community Page in Hospital Medicine Exchange (HMX):** Your chapter will also have its own page in [Hospital Medicine Exchange \(HMX\)](#) that will be linked directly to the chapter's homepage on [hospitalmedicine.org](http://hospitalmedicine.org). The community page will include information about your chapter including: geography, leadership, events, files (e.g. chapter newsletters), photos (e.g. from events), and a discussion area.

Chapter Leaders can submit content to their own communities by starting discussions, adding files or adding photos. Please reference the Marketing and Communications section of the handbook on [page 12](#) for additional information.

**Schedule a Formation Call:** Staff will schedule a teleconference with the Chapter Leaders to discuss questions around volunteer formation responsibilities and staff support, and assist with the planning of your inaugural meeting.

**Announcement of Chapter Formation:** After your chapter's roster has been set up and your Chapter Community page is live in [Hospital Medicine Exchange \(HMX\)](#), the National Office will send out an email to your chapter roster announcing the formation of your chapter. This email is to inform members that they now have local representation of SHM and can expect to hear information about upcoming meetings. The email will include Chapter Leader names, geography and inaugural meeting information if available.

## Inaugural Meeting

It is recommended that you plan your first meeting at least two to three months in advance. Most chapter meetings run two to three hours, are held during the week (Monday-Thursday) and are held in the evening over dinner. Neutral locations among all local hospitals are recommend such as an easy accessible restaurant. For your first meeting, the following agenda is recommended:

**One Hour:** —> Networking hour with exhibitors

**Half Hour:** —> Welcome, Introduction of Founding Leaders, Discussion around chapter goals and plans for the first year

**One Hour:** —> Speaker Educational Presentation (Optional), Dinner

## Chapter Requirements

The following steps are recommended for planning purposes:

1. Decide a timeframe you want to hold your first meeting and whether or not you want an educational presentation.
2. Research venue options. Restaurants centrally located to members typically work great for chapter meetings. When making your selection, be sure to ask if the venue has a projector/screen, microphone (not always needed) and space for exhibitor tables.
3. If you are going to have an educational presentation, keep the date of your meeting flexible until you have your speaker/topic selected and have confirmed the speaker's availability.
4. Once you know your speaker's availability, confirm a date and time for your meeting with the venue.
5. Develop an agenda (see recommendation above).
6. Solicit exhibitors. You will want exhibitors to display during the networking portion of your meeting in order to offset the costs. Utilize the National Exhibitor Contracts (see information below) or the Exhibitor Request Letter Template (see Appendix VI) to send requests to your local representatives.
7. Once the details of your meeting have been confirmed, submit them to the National Office (required) [in the Meeting Notification Form in Hospital Medicine Exchange](#). Once received, Staff will promote your meeting in your chapter's community in HMX and via email to your chapter's roster.

## Receiving Full Status Recognition

Chapters DO NOT need to complete an application for full recognition status. Staff will make recommendations to the National Board annually for approval of full recognition status if the criteria below are met within one year of establishment. If the criteria below are not met, Staff will recommend that your chapter either reapply for provisional recognition or that your chapter should receive full recognition pending the completion of one or more criteria shown in the list below.

**Leadership:** While only two founding members are required to start a chapter, you must have a minimum of three dues-paying member leaders with defined roles (President, President-Elect, Treasurer, Secretary) with terms (e.g., two years) in order to achieve Full Status. Please see the section in this handbook titled Chapter Organization and Leadership for more information and guidance.

**District Calls:** At least one Chapter Leader must be present on every Chapter District Call throughout the year.

**Meetings:** Your chapter must have held at least two meetings in the past calendar year.

**Demonstrated Interest:** At least 25 hospitalists from a minimum of three institutions must support your chapter's activities. This can be shown by the sign-in sheets at the two meetings you held, or a signed petition.

## Maintaining Full Status Recognition

Chapters are evaluated on an annual basis and reports sent to the National Board for the January Board Meeting. District Chairs will receive a copy of the report as well to determine how chapters in their district are performing and how they can provide mentorship. Evaluations are conducted based on maintaining requirements, a chapter's annual chapter goals and work plan, and its health status.

## Maintaining Requirements

**Leadership:** Chapter maintains a minimum of three leadership positions with current dues-paying members of SHM with defined roles and terms. Chapter follows an election cycle that aligns with that of the National Board based on the chapter's defined terms.

**District Calls:** At least one Chapter Leader must be present on every Chapter District Call throughout the year.

**Meetings:** Chapter holds at least two meetings each calendar year.

**Administration:** Submission of Meeting Notification Form, Meeting Report Form with your sign-in sheet and posting of updates in your chapter's community in [Hospital Medicine Exchange \(HMX\)](#) for every meeting held.

**Submission of Annual Goals and Work Plan:** Staff will disseminate a Goals and Work Plan Form to each chapter to complete in preparation for the following calendar year. Chapters are required to complete and return the form to the National Office annually.

## Annual Chapter Goals and Work Plan

Chapters are required to submit goals and a work plan for the upcoming calendar year. A document will be disseminated by Staff to all Chapter Leaders to utilize for submission. This takes place at the end of the calendar year. [See Appendix VII](#) for an example of this document.

**Goals:** Chapter Leaders should consider goals that are SMART (specific, measurable, achievable, results-focused and time-bound). Also consider the following when goal setting:

- How advanced is your chapter leadership structure and is there opportunity for its development?
- How can you grow your chapter's membership?
- How can you engage your entire chapter's membership (even those who cannot attend every meeting)?
- What new activities can your chapter implement to increase the value of membership in your chapter?
- Are residents and students engaged with your chapter?

**Work Plan:** Determine how many meetings you will hold in the upcoming year and what months they will take place. Consider what types of events they will be and the topic(s), and whether you will want to apply for CME.

## Health Status Evaluation

A health status evaluation is conducted annually for each chapter and reported to the National Board for the January Board Meeting. A health status is contingent on the submission of your chapter's annual goals and work plan. Chapter Leaders will be provided their health status for the year prior.

There are five total health statuses into which a Chapter can fall. Below is a description of each:

Level	Description	Level	Description
<b>RED</b>	Chapter does not meet any requirements and does not show signs of improvement. Chapter will be dissolved and asked to reapply for provisional recognition.	<b>BLUE</b>	Leadership: Chapter has robust leadership structure with defined roles, terms and a succession plan. Leadership meets regularly to discuss goals and plan for chapter's longevity.
<b>ORANGE</b>	All chapters that are in Provisional Status for more than 75% of the year prior will automatically fall into the Orange level.		Meetings: Chapter holds four or more meetings per year.
	Full Status chapters that do not have three active Chapter Leaders and/or have held less than two total meetings will be moved to Provisional Status. This means that the chapter will have one year (end of the following calendar year) to meet the requirements of a Full Status chapter. If requirements are not met by the one-year mark, your chapter will move into Red Health.		Administration: Chapter has submitted all meeting forms and sign-in sheets in a timely manner. Chapter has submitted goals and work plan for upcoming year.
<b>YELLOW</b>	Leadership: Chapter has three active member leaders but they do not have defined roles, terms and a succession plan.		Advanced Programming: Chapter meets one criterion of at least 2/3 sections below.
	Meetings: Chapter is holding at least two meetings per year. Administration: Chapter has not submitted ALL meeting forms (notification and report) and/or sign-in sheets for every meeting.		Chapter participated in at least one of the following: <ul style="list-style-type: none"> <li>• Applied for Chapter Excellence Awards</li> <li>• Applied for Chapter Development Funds</li> <li>• Applied for CME for chapter meetings</li> </ul>
<b>GREEN</b>	Leadership: Chapter has a minimum of three active leaders with defined roles, terms and a succession plan. Meetings: Chapter is holding two to three meetings per year. Administration: Chapter has submitted all meeting forms and sign-in sheets. Chapter has submitted goals and work plan for upcoming year.	Chapter participated in at least one of the following: <ul style="list-style-type: none"> <li>• Held a meeting focused on engaging residents or students (career event, panel discussion, abstract/poster RIV Competition)</li> <li>• Job Fair</li> <li>• Held a meeting to engage APPs, practice administrators or other non-physician hospitalists</li> <li>• Conducted a mentorship program</li> </ul> Chapter participated in at least one of the following: <ul style="list-style-type: none"> <li>• Provided a scholarship</li> <li>• Offset the cost of membership (note: if this was through development funds it would be counted once)</li> <li>• Chapter Challenge</li> </ul>	