

Chapter Leader Exchange

HIMSS Innovation Center

1 St. Clair NE, Cleveland, OH | July 25-26, 2017



hiMSS North America

Tuesday, July 25

Lunch on your own

11:30 a.m. – 12:00 p.m.

Guided Tour of the HIMSS Innovation Center – 1st Opportunity

Leaders are invited to tour the HIMSS Innovation Center and Global Center for Health Innovation.

12:30 p.m. – 1:00 p.m.

Registration / Meet Your Mentor

Meet other chapter leaders and find your seat for a 1:00 sharp start. New and experienced chapter leaders interested in the mentor program will be connected with their mentor/mentee before the start of the program.

1:00 p.m. – 1:45 p.m.

Welcome and Introductions

Chapters Task Force Chairs / HIMSS staff welcome chapter leaders / advocates and give a brief overview of the mentorship program. Each chapter leader / advocate introduces themselves by name, chapter, and role within their chapter.

1:45 p.m. – 2:30 p.m.

Our Strategic Framework and Major Themes for FY2018

Carla Smith, MA, CNM, FHIMSS, Executive Vice President, HIMSS North America
Learn about our strategies, audiences, and content areas that will drive the HIMSS North America mission in FY18.

2:30 p.m. – 3:00 p.m.

Healthcare in the White House

Jeff Coughlin, Senior Director, Federal & State Affairs, HIMSS North America

With a new administration comes uncertainty and potential for change. Luckily, HIMSS has its own Government Relations expert here to educate us with the latest information from the White House.

3:00 p.m. – 4:00 p.m.

Break / Interactive Networking Activity

- Commercial break by HIMSS staff
- Networking activity

4:00 p.m. – 4:45 p.m.

Fireside Chat with HIMSS President and CEO

Steve Lieber, CAE, President and CEO, HIMSS

Moderator – Scott Smiser, Chapters Task Force Chair

Fireside chat with HIMSS President and CEO and the FY18 Chapters Task Force Chair to discuss how an experienced leader deals with crises, conflict, motivation, oversight, delegation, and much more.

4:45 p.m. – 5:00 p.m.

Networking Break and Reception Intro

5:00 p.m. – 6:30 p.m.

Reception and HIMSS Tailgate

Visit the HIMSS tailgate games to retrieve tickets for fun prizes!

Wednesday, July 26

Chapter Leader Agenda

- 8:00 a.m. – 8:45 a.m.** **Breakfast and Welcome**
Scott Smiser, Chapters Task Force, Chair
- 8:45 a.m. – 9:15 a.m.** **Making Smart Financial Decisions for Your Chapter**
Gavin Farry, MBA, CPA, Senior Vice President and CFO, HIMSS
HIMSS CFO shares best practices strategies for banking, preventing fraud, auditing, and financial sustainability.
- 9:15 a.m. – 10:00 a.m.** **Member Engagement & Outreach: Tools for Success**
Joyce Lofstrom, Senior Director, Corporate Communications, HIMSS North America
Lauren Hernandez, Manager, Marketing, HIMSS North America
Facilitator: Kevin Minot, Senior Manager, Individual Membership, HIMSS North America
HIMSS communication experts will share best practices for utilizing tools and resources to recruit, retain, and engage members.
- 10:00 a.m. – 10:30 a.m.** **Presenting: The New and Improved Annual Standards Report and Policy Manual**
Angie Gorden, Senior Manager, Strategic Relations
Jordan Blinn, Coordinator, Strategic Relations
Angie and Jordan help chapter leaders understand the Annual Standards Report and Policy Manual in this fun and educational session to ensure attendees are well prepared for their board term. Angie and Jordan will facilitate a Q&A to enhance understanding.
- 10:30 a.m. – 10:45 a.m.** **Break**
- 10:45 a.m. – 12:00 p.m.** **Building a Chapter Policy Manual**
10:45 a.m. Facilitated discussion: Building the “Table of Contents” / Expectations and guidelines
11:05 a.m. Designated group time for assigned section(s)
11:40 a.m. Checkpoint
- 12:00 p.m. – 12:45 p.m.** **Networking Lunch**
- 12:45 p.m. – 1:45 p.m.** **Building a Chapter Policy Manual**
12:45 p.m. Finalize assigned section(s)
1:15 p.m. Regroup for feedback and lessons learned
- 1:45 p.m. – 2:00 p.m.** **Discussion Wrap-up, Feedback, and Closing**
Scott Smiser, Chapters Task Force, Chair
Lorna Waggoner, Chapters Task Force, Vice Chair
The Chapters Task Force Chair and Vice Chair will close CLE with their thoughts and feedback from the two-day meeting, provide chapter leaders an opportunity to give any closing thoughts, and wish everyone a safe trip home.
- 2:15 p.m. – 2:45 p.m.** **Guided Tour of the HIMSS Innovation Center – 2nd Opportunity**
Leaders are invited to tour the HIMSS Innovation Center and Global Center for Health Innovation.

Chapter Advocacy Agenda

- 8:00 a.m. – 8:45 a.m.** **Breakfast and Welcome**
- 8:45 a.m. – 9:00 a.m.** **Introductions & Review of the Agenda**
Valerie Rogers, Director, State Government Affairs
Marielle Kocak, Coordinator, Federal and State Affairs
- 9:00 a.m. – 9:45 a.m.** **Advocacy 101: The How, What & Why of Advocacy and Policy Work**
Jeff Coughlin, Senior Director, Federal & State Government Affairs,
Valerie Rogers, Director, State Government Affairs, David Gray, Manager,
Congressional Affairs, HIMSS North America
The SGA Team will give an overview of policymaking at the state legislative and municipal levels of government. This session explains basic forms of advocacy as well how to effectively communicate with elected officials and policy makers.
- 9:45 a.m. – 10:15 a.m.** **From the Grassroots to Grasstops: Building a Value-based Advocacy Initiative**
HIMSS Chapter Advocacy Vice-Chairs
Jim Douglas, Former Governor of Vermont, Jeff Coughlin, Senior Director, Federal & State Affairs, HIMSS North America ,
HIMSS communication experts will share best practices for utilizing tools and resources such as CQ Roll Call to inform and engage state officials.
- 10:15 a.m. – 10:30 a.m.** **Activity: Share with neighbor a value of your chapter and how it relates to policy or legislation you are advocating on. 15 min**
Facilitator: Valerie Rogers, Director, State Government Affairs, HIMSS North America
HIMSS SGA staff will share best practices for utilizing tools and resources to help advocated develop a strong voice, become a respected source and strong collaborator to impact state health IT policy and federal initiatives.
- 10:30 a.m. – 10:45 a.m.** **Break**
- 10:45 a.m. – 12:00 p.m.** **Building a Chapter Advocacy Infrastructure Checklist**
Facilitator: Jeff Coughlin, Senior Director, Federal & State Affairs & Valerie Rogers, Director, State Government Affairs, HIMSS North America
10:45 a.m. Facilitated discussion:
a. Whom do I advocate to?
b. How will you advocate? What is in your advocacy toolbox?
c. How will you make decisions on what you advocate about?
d. How will you prioritize your advocacy focus amidst so many worthy issues?
11:15 a.m. Planning for your Advocacy Day & Legislative Visits
11:40 a.m. Group Exercise: Advocacy activities to help your Chapter be credible, visible and connected (Short neighbor discussion: Choose one of these examples and share a way your Chapter is doing this (or might do this).
- 12:00 p.m. – 12:45 p.m.** **Networking Lunch**
- 12:45 p.m. – 1:45 p.m.** **On the Horizon: Current and Future Topics**
Facilitators: Jeff Coughlin, Senior Director, Federal & State Affairs & David Gray, Manager, Congressional Affairs, HIMSS North America
12:45 p.m. Review of Congressional and Federal Affairs
1:30 p.m. Future of Health IT (Jim Douglas, Former Governor, Vermont)
- 1:45 p.m. – 2:00 p.m.** **Break**

2:00 p.m. – 2:30 p.m.

The HIMSS 2017 SGA 3.0 Advocacy Challenge and Recognition Program

Valerie Rogers, Director, State Government Affairs

Marielle Kocak, Coordinator, Federal and State Affairs

Valerie and Marielle will lead CAR members on a journey to explore and understand the revised CAR Recognition Program and Advocacy Checklist. At the end of this session, attendees will have gained a clear understanding of chapter compliance and are well prepared for their board term. Valerie and Marielle will facilitate a guided open discussion to enhance understanding.

2:30 p.m. – 3:00 p.m.

Chapter Advocacy Round Robin Feedback and Closing

The CAR Vice Chairs and members will close the training with their thoughts and feedback from the two-day meeting, provide CAR members an opportunity to give any closing thoughts, and wish everyone a safe trip home.

3:00 p.m. – 3:45 p.m.

Guided Tour of the HIMSS Innovation Center (Optional)