

How to Form a HIMSS Chapter

Introduction

Thank you for your interest in starting a chapter. This document will give an overview of how to organize a chapter, from the initial gathering of individuals, to full accreditation as an official chapter. Feel free to contact the HIMSS Chapter Relations staff with any questions.

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Purpose of HIMSS Chapters

Chapter members participate in targeted education, networking opportunities, and advocacy as well as innovation efforts at the local level. HIMSS chapters engage membership at the city, state, or regional level. All HIMSS members have the benefit to opt into one chapter, and can pay an additional fee to opt in to multiple chapters. Chapters are volunteer led and members have the opportunity to engage in leadership roles and/or committees within their chapter.

Performing as a Chapter of HIMSS

HIMSS members receive a complimentary membership in a chapter of their choice. Members are required to select a chapter upon joining or opt out of the chapter benefit.

HIMSS chapters can contact HIMSS staff for continued support, an advantage of membership and chapter participation. Having the support of staff gives HIMSS chapters a significant resource to call upon, as they seek to build effective, local groups.

All chapters receive:

- Bimonthly HIMSS Chapter Leader eNews
- Opportunity to participate in training (virtual and in person) and open discussion webinars

- Board member access to the online Chapter Leader Resource Area with tools and information specifically for chapter leaders
- Support and assistance in achieving chapter goals

Acting as a Chapter of HIMSS

A chapter provides education and networking, and assists local health information and technology leaders to build connections within their region. Each chapter's governance (fully volunteer-led) determines the chapter's focus of education and activities within the scope of the mission and vision of HIMSS, which are:

HIMSS Vision

A world where everyone, everywhere, has access to a health and wellness ecosystem that works - one with the human at its heart.

HIMSS Mission

To reform the global health ecosystem by leveraging the power of information and technology. By creating an informed and empowered community of providers, innovators and individuals, we will enable an ever-improving state of health and wellness throughout the world.

Providing Chapter Support

HIMSS provides support to the chapter with:

- Chapter visits
- Guidance and communication on chapter activities
- Chapter-only resources on the HIMSS website
- Chapter website for member education and access
- Leadership training on financial management, board communication, and program planning

Chapters work collaboratively with existing associations and communities of practice with similar interests. The creation of a local chapter would facilitate idea exchange with other chapters in North America and globally, and provide a forum for bringing relevant ideas and innovations locally.

Establishing a Chapter of HIMSS

The primary requirements are:

- Interest by 40 or more HIMSS individual members in a defined geographical area

- Interested members must be from diverse work environments
- Establishment of an organization (officers, bylaws, work plan)
- Signing of an affiliate agreement with HIMSS
- Agreement to comply with HIMSS Chapter Policies & Procedures.

How to become a HIMSS Chapter?

Step 1. Get In Touch With HIMSS

Once a group has decided they are interested in organizing a chapter, contact the HIMSS Chapter Team at chapters@himss.org. This allows you to consult with HIMSS staff and draw on their expertise from helping other chapters organize. Send a letter or email to the Chapters Staff outlining the territory being applied for, formation committee details, and an approximate timeline for submitting your chapter application making your intentions known to HIMSS

Step 2. Survey Members & Prospects

HIMSS staff will work with you to survey members and prospects to see if there is interest in forming a chapter. This will also help recruit volunteers to serve on the Chapter Board of Directors.

Step 3. Prepare your Chapter Application and Territorial Jurisdiction Application

Working collaboratively with other individuals in your group, and if needed, the HIMSS staff, prepare all aspects of the chapter application. This includes preparing an Action Plan for the chapter programs, completing all required organization documents (such as your Bylaws), and listing all of your Board of Directors. Ensure all the necessary information is completed.

NOTE: Preparing the Chapter Application and Territorial Jurisdiction Application does not imply automatic approval by the HIMSS Board of Directors. Staff will advise the chapter as soon as approval has been granted.

Territorial Jurisdiction Policies & Procedures

No Conflict with Territorial Jurisdiction

A chapter seeking unassigned territory is required to confirm the availability of such territory with HIMSS. If the territory is unassigned, once the volunteers have reviewed the manual, an exploratory conference call with a representative from the Chapter Relations team will be held to discuss the requirements, expectations, and answer any questions. If the requirements are met, the chapter must complete the Chapter Formation Application

and appropriate forms, which will be reviewed by the HIMSS Chapter Relations staff. Upon staff approval, Application and staff recommendation is sent to the HIMSS Board of Directors for final approval.

Conflict with Territorial Jurisdiction

The volunteers interested in forming the chapter must have an exploratory conference call with a representative from the Chapter Relations team to discuss the requirements, expectations, and answer any questions. If the volunteers are still interested, HIMSS will immediately notify the chapter(s) that is affected. The purpose of this notice is to determine if there are objections to the potential formation. If there are objections, a conference call will be scheduled to discuss the concerns, work on a solution to best serve the members of the disputed territory, and next steps.

If the requirements are met, the chapter must then complete the Chapter Formation Application and Territorial Jurisdiction forms, which will be reviewed by the HIMSS Chapter Relations staff. Upon staff approval, Application and staff recommendation is sent to the HIMSS Board of Directors for final approval.

Upon receipt of the application HIMSS will send communication to all chapters that conflict with the applicant chapter's requested territory and all HIMSS members in the requested territory advising of the proposed change of territorial jurisdiction. The purpose of this notice is to determine if there are any unresolved objections to the application or competing claims for the territory by other chapters. Chapters and HIMSS members shall have 30 days to respond to the notice.

Disputes Regarding Unassigned Territory and the Appeals Process

If there are competing claims for the territory by another chapter, or if a majority of the members in the unassigned territory object to the application, all parties shall have the opportunity to present their respective positions, first to a panel of HIMSS staff made up of the Director of Chapter Relations and the Vice President of Member Relations. If the parties wish to appeal the decision, a panel consisting of the Chief of Americas of HIMSS, the HIMSS Vice President of Member Relations, the HIMSS Director of Chapter Relations and three Chapter Task Force members will be convened. The panel's decision will be binding. Any panel member with vested interest in the outcome of the proceedings must disclose that interest and abstain from action.

Release of Territory:

If a portion of an existing chapter's territory is being requested, a written release from the existing chapter must be included, with the territorial jurisdiction description. The release of territory by another chapter is an official change of jurisdiction and, as such, requires that the chapter releasing the jurisdiction amend its bylaws. Territorial changes to the

existing chapter's bylaws, pursuant to this procedure for forming a chapter, will not require a written petition and member affirmation as is mandated for amending chapter bylaws.

Step 4. Submit Your Application

Submit the application to the HIMSS Chapter Relations team for review. HIMSS staff will make recommendations to approve or deny the chapter and submit to the HIMSS Board of Directors for their final approval/denial. HIMSS Director of Chapter Relations will notify chapter applicants of the status of their application once the HIMSS Board of Directors has made their determination

We are a chapter, now what?

Beginning Organizing Tips

- 1.** Plan an initial organizing meeting

Most chapters work to become self-sufficient from the start. It is important to pull together a group of members who show commitment to the group from the onset of organizing the chapter. Establishing and publicizing your first meeting will be an essential step in that process.

- 2.** Perform outreach

Prepare a brief announcement that includes the purpose of HIMSS, as well as specific details of the meeting (such as the time, place,) will be essential. Another important thing to keep in mind is that HIMSS does not seek to replace or subvert existing chapters.

- 3.** Set a regular time and place for future meetings

This allows chapter participants to schedule meetings and events and become involved. Remember, studies have shown that the farther in advance you can schedule your events and meetings, the better attendance will you'll have.

- 4.** Establish leadership

Each group needs to have a Chapter Board of Directors that will bear responsibility for leading and organizing. Your chapter is no different! Chapters need to form Boards that will take on educational programming and financial responsibility. Also remember that elections need to be held for a Chapter President, President-Elect, Treasurer, and Secretary (to name a few Board positions). At first, these meetings might be small and informal, but the Chapter Board is an important mechanism for tapping the enthusiasm and skills of people who care about your issue. Having people make a formal commitment means they are more likely to become truly involved in the chapter's growth.

- 5.** Start implementing your action plan

Experience shows that groups that simply offer individuals the chance to meet, but are not focused on action, rarely prosper. It is vital early on to give focus to your group's work by

determining projects you will want to work on. This can include some of those outlined above or new ideas developed by your members. The key thing to remember is: do something. People are more enthusiastic and focused when they are working toward a concrete goal.

6. Contact HIMSS staff to consult about your projects
HIMSS staff can be invaluable to you so contact them with any questions. Programming, some limited funding, and general ideas on 'how to' can be supported by HIMSS. Each new chapter does not have to "reinvent the wheel." Take advantage of this support by learning what has worked for others, and use that assistance in planning your events. We will help you determine what resources you need and how to get them so that you can have a successful event.

Frequently asked questions

What if we are an existing group that wishes to become a HIMSS chapter?

Most importantly is to ensure, through a formal process, that the membership of your group wishes to become a HIMSS chapter. It is the HIMSS philosophy to work collaboratively with existing groups, not to supplement them. If you wish to become a HIMSS chapter, follow the guidelines outlined in this document. If there is a current chapter that resides in part of the territory that you are applying for, HIMSS must make sure that the existing chapter approves the formation.

How does HIMSS chapter governance work?

Chapters are governed by their own Boards, which adhere to the HIMSS Standardized Chapter Bylaws and policy directives set out by the HIMSS Board of Directors and are autonomous as long as they meet the limited restrictions therein and do not violate the guidelines for 501(c)(6) status outlined by the IRS. Chapters who compromise HIMSS's Mission or violate its Bylaws may be dissolved or disaffiliated by the HIMSS Board of Directors, thus losing their rights to use the HIMSS name or derive any income from the organization. Similarly, local groups can choose to disassociate themselves from HIMSS at any time, thus foregoing the privileges of membership and the use of the HIMSS name.

How long does it take to form a chapter?

This depends on the level of organization of your group and the amount of time committed to completing the application process. However, for most chapters, the process takes about two to three months to complete the application process. Accreditation is typically given within a month after the application is received by HIMSS.

It should be noted however the HIMSS Board of Directors must approve all chapter formations.

What support does HIMSS provide to its chapters?

The assistance provided is mostly dependent upon the needs of the chapter. Support comes in the form of chapter visits, leadership training teleconferences on topics ranging from financial management, effective board communications to planning successful programs.

- All chapter leaders receive a bimonthly e-mail newsletter that contains a variety of useful resources.
- The Global Health Conference has a specific event designed to train chapter organizers to be more effective leaders, also HIMSS hosts a Chapter Leader Exchange for 1 ½ days each year.
- The HIMSS's website has a specific area dedicated to resources for its chapters.
- Each Chapter is provided a web site and many electronic communication tools to help with outreach to members.

What makes a chapter successful?

It is our experience that two factors determine a chapter's success: its team and its plan. By team we mean the chapter that has a committed chapter board. By plan we mean the chapter has spent quality time planning its actions and contemplating both positive and negative outcomes. The plan should be written down and re-visited often. It doesn't matter whether you are from a rural or urban area; if you have the team and the plan, your chances for success are great.

How much money does it take? Where does it come from?

It doesn't cost any money to become a HIMSS chapter. Most of the services HIMSS provides its chapters are free! However, every chapter will incur expenses, and those will vary depending on the programs the chapter chooses. Most chapters should expect to have administrative costs and other costs associated with their programmatic activity.

Supporting Documents

The Affiliate Agreement and Bylaws will help give you a better understanding of the expectation of Chapters, as well as the foundation to form a chapter.

APPLICATION FOR TERRITORIAL JURISDICTION

You must complete the ENTIRE Application

Please return it to: chapters@himss.org

Application for: New __ Chapter __ Expansion of Existing Chapter

Proposed Chapter Name: _____

Description of Territorial Jurisdiction

State, County (ies), Providence, etc.	Includes the following Zip Codes:
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Note: If there are more counties, please indicate in additional pages.

Please include attachments of

- Chapter Bylaws
- Affiliate Agreement
- Annual Plan (Chapter goals, membership growth, education programs, communications)

By submitting the chapter is agreeing to comply with the HIMSS Chapter Accountability Reporting.

Chapter Members

A minimum of 40 members is needed in order to form a Chapter. If you have surveyed members in your area to determine interest in a Chapter, please state the amount of positive responses received: ____

If you did not survey members, provide the names and member IDs of interested members forming a chapter.

NAME	HIMSS Member ID

CHAPTER OFFICER LIST

We request recognition as an official HIMSS Chapter, and approval of the attached bylaws. Below are the names, addresses, and signatures of four Chapter Officers. All Chapter Board Members are members of HIMSS in Good Standing.

Name First/Last	Position	Term Expiration	Email	Phone	HIMSS Member in Good Standing

OTHER CHAPTER OFFICERS SUGGESTED ROLES

Below are the names, addresses and signatures of all Chapter Officers (HIMSS suggested roles: Treasurer, Secretary, Treasurer/Secretary, Programs Chair, Publications, Membership Chair, Chapter Advocate Liaison, Chapter HIE Liaison, Communications Chair, Web site Chair, Sponsorship Chair, Board Member at Large, etc.) All Chapter Board Members are members of HIMSS in Good Standing. An attached spreadsheet will be accepted.

Name First/Last	Position	Term Expiration	Email	Phone	HIMSS Member in Good Standing

By putting your name, it signifies that you agree to report to HIMSS any future pertinent situation that may develop and that may constitute a conflict of interest while candidate for, or member of, a HIMSS Chapter or any elected positions of HIMSS. You are also a HIMSS member in Good Standing.

HIMSS Office use only:

Date Submitted:

Date Reviewed:

Date Approved:

Approved by:

Approval Letter Sent:

Date Chapter Established: