



shm[®]
Society of Hospital Medicine

Special Interest Group (SIG) Handbook

Updated Spring 2024

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Introduction

The Society of Hospital Medicine (SHM) represents the fastest growing specialty in modern healthcare, reflecting the strength and vibrancy of the hospitalist movement. In part, SHM's growth stems from the desire of individual hospitalists to identify with the broader hospital medicine movement.

As a Special Interest Group (SIG) Leader, you have a very important role in SHM's national organizational structure and engagement strategy. You serve the role of leading and representing your SIG. You also play an important part by being an intermediary between the national Society and your specialty/topic of interest.

SHM reviews each SIG on an annual basis to ensure it is meeting baseline requirements to maintain full SIG status. SHM invites all SIGs that fall short of the baseline requirements to reapply for re-establishment. This is a concerted effort to ensure that all SHM members can be confident that participation within a SIG provides meaningful networking, engagement, leadership, and learning opportunities, and that they are receiving a high-quality experience, worthy of their limited time.

SHM expects each of its SIGs to serve as a vehicle for:

- Networking and engagement opportunities with other members who share similar interests;
- Providing alternative pathways for volunteer leadership;
- Sharing educational content for the benefit of members of the SIG to improve the quality of practice, in both clinical and administrative aspects; and
- Conveying information about important national initiatives, trends, policy issues, and events to the members of the SIG.

In addition, each SHM SIG should aim to:

- Identify and engage future leaders of the hospital medicine movement;
- Increase overall membership growth and satisfaction; and
- Enhance the professional and public perception/profile of hospital medicine.

By meeting the above objectives, a strong SIG can serve as a bridge between individual hospitalists and SHM, the national organization for hospitalists.

This *SHM SIG Handbook* has been created as a reference guide for you and your SIG. To make it easier to use, we have divided the handbook into sections so you can quickly find the information you need.

We realize that it can be overwhelming to start a new leadership role and know where to begin. We strongly suggest that you read through this handbook to familiarize yourself with the information and refer to it in the future as needed.

We wish you much success with your Special Interest Group.

If you have any questions, please contact the SIG program staff at SIGS@hospitalmedicine.org

SIG Support

SHM employs staff who support the Society's SIG program by providing oversight to ensure an effective foundation and platform for success, consistent with SHM's mission, vision, values, and goals.

SHM believes SIGs are an important part of the organization's engagement strategy and are thus housed under the Membership Department to increase the Society's membership engagement, retention, and acquisition. SHM is fortunate to have dedicated members who work tirelessly to increase the value of membership through high-quality SIG programming.

SHM Office

The SIG program is managed by SHM staff who are located in Philadelphia, Pennsylvania.

Location and Contact

Society of Hospital Medicine

1500 Spring Garden, Suite 501

Philadelphia, PA 19130

Phone: (800) 843-3360

Email: SIGS@hospitalmedicine.org



SIG Program Overview

SHM Structure

The Society of Hospital Medicine is the only national association devoted to hospital medicine. SHM's membership consists of physicians, nurse practitioners and physician assistants, affiliates (non-clinicians working in hospital medicine), allied health professionals (registered nurses, hospital pharmacists, and other non-physician clinicians), residents and fellows, medical students, and international members.

SIG membership consists of any active, dues-paying member of the Society of Hospital Medicine who has self-selected to join a SIG. Some members are automatically assigned to a SIG based on their membership type. The charge of all SIGs is to promote and advance the continuing growth and diversity of membership and to ensure that all members can share in the material and intellectual resources of SHM.

SIG Charge

- Promote the mission of the association to fellow hospitalists;
- Educate, inform, and involve members in the activities of the association;
- Broaden membership and engagement within their respective SIG communities;
- Hold minimum quarterly Leadership calls to discuss strategy, goals, and progress of the SIG;
- Use the Hospital Medicine Exchange (HMX) platform as the primary vehicle for communication and interaction with SIG members;
- Engage members and provide leadership opportunities;
- Regularly revise all documents in the community resources/files in HMX; and
- Provide members with representation by reporting on SIG activities via submission of progress reports.

SIGs are organized around topics of interest, practice areas, and/or care models.

Please visit [the SIG page on SHM's website](#) for a current list of SIGs.

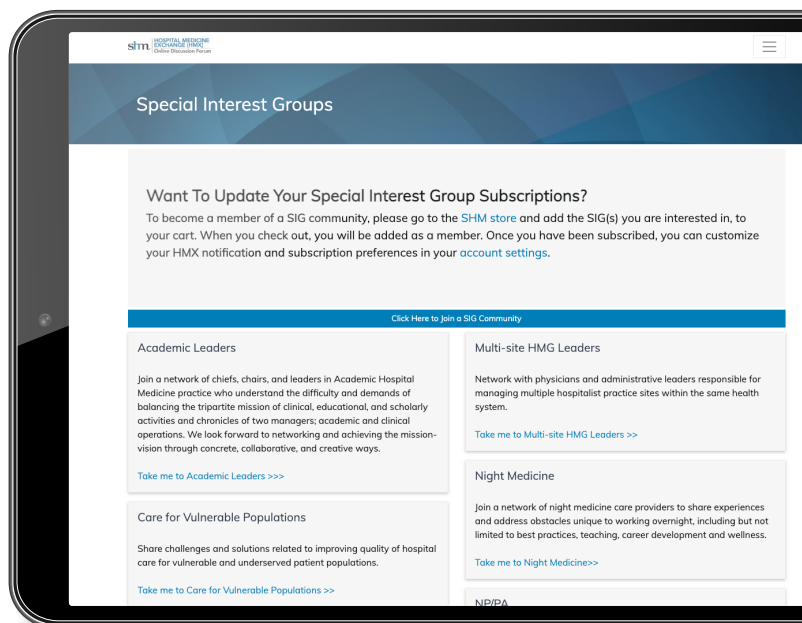
Keeping Informed

SIG Leaders should become familiar with their respective **SIG Community** and the **SIG Leaders Group** within SHM's **Hospital Medicine Exchange (HMX)** platform. The **SIG Leaders Group** is exclusive to SIG Leaders and should be utilized for the following:

- Networking with other SHM SIG Leaders;
- Obtaining and accessing relevant forms;
- Locating other resources and tools;
- Reviewing updates and news from the Society.

SIG Leaders' Quarterly Meetings

The SIG program will have a quarterly meeting where SIG Leaders and SHM staff who support SIGs will be present. These meetings will be teleconferences, unless one is held in-person at SHM Converge, SHM's Annual Conference. They will include updates and news from SHM at the national level and best practices and updates from SIGs on their existing activities, successes, and struggles. At least one Leader from every SIG's Leadership must attend each meeting.





Where Do I Begin?

The remainder of this handbook is divided into sections for easy reference. We encourage you to review these sections as you continue to build and strengthen your SIG. The sections and their respective content are as follows:

SIG Launch and Maintenance Requirements

Learn how to start your SIG, how your SIG will be evaluated, and how to maintain full SIG Status.

SIG Leadership and Governance

Learn what positions are recommended for SIGs to operate and the job descriptions for each of those positions, as well as how to develop the SIG's governance structure.

Activities

Discover a variety of educational, advocacy, and engagement activities your SIG can undertake to provide value to current members and grow your SIG's membership.

Special Interest Forums (SIFs) at SHM Converge

Find an overview of SHM's Special Interest Forums (SIFs) at SHM Converge, who should attend from your SIG, and tips for planning the SIF.

Membership

Learn more about the benefits of SHM membership and how to communicate those benefits to SIG members.

Appendix

Quick access and reference guide to the resources mentioned in this handbook, as well as SHM organizational structure, member benefits, important deadlines, and more.



Getting Started

SIG Launch

Once a SIG has been approved, SHM staff will take the following measures to set up newly approved SIGs:

SIG Community Page in Hospital Medicine Exchange (HMX)

The SIG will have its own page on SHM's Hospital Medicine Exchange (HMX). The community page will include information about the SIG, including leadership, events, files (e.g., SIG agendas and minutes, newsletters, resources, etc.), photos (e.g., from events), and a discussion area.

SIG Leaders are encouraged to start discussions and add files, photos, and resources to their SIG's HMX Community.

SIG Roster

All SHM members listed on the SIG petition will be assigned to the SIG's HMX Community. Non-members will not be able to access the SIG's HMX Community as HMX is an exclusive member benefit. All SIG members who have subscribed to the SIG's HMX Community will begin to receive "Daily Digest" emails from HMX when there are messages posted within the community.

SIG Information on HospitalMedicine.org

The SIG will be added to the list of recognized SHM SIGs on SHM's webpage and viewable here: [SHM Special Interest Groups](#).

Schedule Initial Planning Call

SHM staff will help coordinate and schedule a teleconference with the leaders from the newly formed SIG to discuss questions about volunteer leadership responsibilities and staff support. They will also assist with planning the SIG's inaugural meeting.

Announcement of SIG

After the SIG's HMX Community page is live and initial members have been assigned to the SIG's roster, SIG Leaders should announce the establishment of the SIG on HMX. This initial post should introduce the SIG Leaders to current and potential members. This is also an opportunity to recruit additional members for the SIG's Leadership (if needed or desired) and inform members that they can expect to receive more information in the future.

SIG Kickoff Meeting

The following steps are recommended for the planning of the SIG's inaugural meeting:

1. Work with SHM staff to determine a date and time when all parties are available to hold the SIG's first call.
2. Once a time has been agreed upon, SIG Leaders should announce the call on HMX, as well as by directly reaching out to colleagues. SHM staff will promote the call by sending an electronic calendar appointment to Leadership members and add it to the SHM [HMX Calendar of Events](#).
3. Develop an agenda (see recommendation below) and share it in the SIG HMX Community.

It is recommended that the SIG's first meeting be planned at least one to two months in advance. Most SIG meetings are one-hour calls held during the work week (Monday-Friday) and are held during normal business hours. Due to the possibility of varied geographic locations of SIG members, SHM recommends that calls are held no earlier than 12 p.m. ET/11 a.m. CT/10 a.m. MT/9 a.m. PT. It is recommended that the following agenda be used for the SIG's initial meeting:

1. Welcome and introduction of Founding Leaders and those present on the call;
2. Discussion regarding SIG goals, plans, and activities for the first year;
3. Time for additional topics and open discussion.

Maintaining Active SIG Status

SIGs are evaluated on an annual basis. SIG program staff generate a report that is shared with SHM Leadership including the SHM Board of Directors and Membership Committee. SIG Chairs receive a copy of the report as well so they may see how all SIGs are performing. Evaluations are conducted using the criteria of the Health Metric Rating and meeting reporting deadlines provided by staff.

Requirements of Active SIGs

Leadership

SIG maintains a minimum of three leadership positions (Chair, Vice-Chair, Secretary) filled by current SHM dues-paying members in good standing. The positions must have defined roles and terms. The SIG should follow a leadership turnover cycle that aligns with that of the annual conference as the start and end of all terms.

Meetings

At minimum, the SIG should hold quarterly Leadership meetings or calls and/or host quarterly member-wide activities or engagement opportunities.

Administration and Document Submission

Annually, SIGs must submit all required forms and documents including a Governance Document with a Leadership Roster, Annual Activity Plan, and Activity Report. Staff will disseminate these forms to SIG Leaders and prompt them to complete and return the forms to SIG program staff. The forms will generally be due around six to eight weeks before or after the annual conference as outlined below.

SIG Leader Calls

Throughout the year SIG program staff will schedule calls with SIG Leaders for the purpose of training, education, and best practice sharing. It is requested that SIGs have at least one SIG Leader present on these calls. It is preferred that a SIG chair or vice-chair attend the call, but a proxy may be designated if necessary.





Reporting

Annual Governance Document

Governance Document

SIG Leaders need to complete the Governance Document, which includes a Leadership Roster to identify the SIG's leadership for the year. The document should also help determine the number, frequency, and types of meetings the SIG will hold in the upcoming year. While not mandatory, SIGs are encouraged to have a purpose statement, self-proposed term lengths for their leadership, and a process for how to plan for leadership recruitment and turnover.

The Governance Document and Roster **MUST** be submitted to be considered for a Special Interest Forum (SIF) at the next SHM Converge – regardless of the SIG's current health metric rating. This document will be due between six to eight weeks after the annual conference.



Annual SIG Activity Plan and Report

Activity Plan

SIG Leaders should consider their Activity Plan as a road map for the year. SIG Leaders will be prompted by SIG program staff for the report. The Activity Plan should be completed and submitted to SIG program staff approximately six to eight weeks after the annual conference. This document should help to identify and define what types of events will be held and the topic(s) of those events.

Additionally, activities should be SMART (specific, measurable, achievable, results-focused, and time-bound).

Consider the following when planning SIG activities:

- How can this help the SIG's membership grow?
- How can the SIG's membership be engaged?
- How can non-SIG, SHM members be engaged?
- Is there an opportunity to collaborate with other SIGs or various member types that could be engaged with the SIG? (Please note all collaboration and invitations should be made prior to any planning or scheduling of events.)
- Will this help fill a knowledge gap and/or provide an opportunity to network?
- What resources are needed to complete the activity and is this something that fits into the scope of what SIGs should be doing? If it does not fit within the scope of SIG activities, it will need to be vetted by SHM leadership.

Activity Report

SIG Leaders will complete the report as a follow-up to their previously submitted plan. This will be used as part of the SIG's annual evaluation. SIGs will not be penalized for not achieving their pre-set goals regarding topics and planning activity so long as they have the required leadership positions filled and have held quarterly Leadership calls and engagement opportunities. SIG Leaders will be prompted for the report but it should be submitted to SIG program staff no later than six weeks prior to SHM Converge.

Annual Evaluation

SIG program staff will conduct an annual evaluation of all SIGs. This evaluation will be based on the SIG's achievement of the criteria and requirements listed above, including timely submission of the Governance Document, Activity Plan, and Activity Report. The report will be generated in the spring preceding the Board of Directors meeting held at SHM Converge. The report will be shared with SHM Leadership, and the SHM Board of Directors. It will then be shared with individual SIG Leaders. There are three health statuses into which a SIG can fall. Below is a description of each:

| LEVEL | DESCRIPTION |
|--------|--|
| GREEN | <p>Leadership The SIG has a minimum of a chair, a vice-chair, and a secretary with defined roles and a succession plan.</p> <p>Composition In addition, the SIG Leadership should consist of a minimum of six additional members for SIGs who have been established for two years or more. SIGs who are less than two years old should have a minimum of eight (8) members (as required on the application for establishment).</p> <p>Engagement The SIG holds, at minimum, three (3) SIG Leadership meetings and/or calls and three (3) SIG membership engagement activities or engagement opportunities for the term.</p> <p>Administration The SIG has submitted the following documents to the staff liaison for review by the SIG Program Manager before being sent to SHM Leadership:</p> <ul style="list-style-type: none"> • Governance Document* and Activity Plan no later than eight (8) weeks post-SHM Converge |
| YELLOW | <p>Leadership The SIG does not have all three positions of chair, vice-chair, and secretary with defined roles and succession plan.</p> <p>Composition The SIG does not have an additional six (6) or more members for SIGS who have been established for two years or more. SIGs who are less than two years old should have a minimum of eight (8) members (as required on the application for establishment).</p> <p>Engagement The SIG does not hold, at minimum, three (3) SIG Leadership meetings or calls and/or three (3) membership engagement activities or engagement opportunities for the term.</p> <p>Administration The SIG has not submitted the following documents to the staff liaison for review by the SIG Program Manager before being sent to SHM Leadership:</p> <ul style="list-style-type: none"> • Governance Document* and Activity Plan no later than eight (8) weeks post-SHM Converge <p>Once a SIG has been rated Yellow, it will have up to six weeks prior to the next SHM Converge, SHM's Annual Conference, to meet the requirements to be rated Green. If the SIG does not meet those qualifications and is rated Yellow for a second consecutive year, it will move into Red Health Status.</p> |
| RED | <p>The SIG has not met any leadership, composition, engagement, or administration requirements for two consecutive years and does not show signs of improvement. Once the SIG has become Red, it will be dissolved, lose staff support, and become dormant.</p> <p>Dormant status means the SIG will:</p> <ul style="list-style-type: none"> • No longer have a staff liaison • Have its SIG HMX Community transitioned to an HMX Forum – where targeted topical conversations can still take place • Require any current or future volunteer leaders interested in reviving the SIG to reapply for re-establishment of the SIG and submit it to SHM Staff for review. |

*Governance Document **MUST** be submitted to be considered for a Special Interest Forum (SIF) at the next SHM Converge, SHM's Annual Conference, regardless of current health metric rating.



Best Practices

Growing and Maintaining Membership

The role of SHM SIGs is to assist in the recruitment and engagement of members; provide networking opportunities; provide alternative pathways to volunteer leadership; share educational content to improve the quality of practice in both the clinical and administrative settings; and convey information about important national initiatives, trends, policy issues, and events.

This section provides strategies to build SIG membership and strengthen the SIG.

SIG Membership

Once a SIG is established, all active members of the Society of Hospital Medicine are eligible to be members of the SIG. SHM membership includes physicians, nurse practitioners, physician assistants, practice administrators, allied health professionals, residents, fellows, and students. There are no separate fees to belong to an SHM SIG. SHM members can join any SIG by opting into the SIG's community in the SHM Hospital Medicine Exchange (HMX).

SIG Leadership Roster and Information about Members

SIG rosters are managed by SHM's SIG program staff in coordination with SIG's leadership. The Leadership roster should be determined by SIG and shared regularly (yearly at a minimum) with SIG program staff to ensure information is up to date in SHM's records.

All active members subscribed to the SIG's HMX Community will appear in the SIG's HMX Community and will act as the SIG's membership roster. Active SHM members not subscribed to the SIG's HMX Community can view the SIG's HMX Community but will not appear as members on the HMX roster.

Please note that non-SHM members should not have access to or be invited to attend SIG events, are not eligible to join the SIG, cannot be on the leadership team, and will be unable to access the HMX community.

Furthermore, member information is the property of SHM and may not be shared with any individual or company outside of the SIG. Do not share any lists you receive or have compiled with outside individuals, vendors, or companies.

SIG Membership Engagement and Retention

One of the primary roles of a SIG Leader is to encourage members to get more involved with the Society by connecting the SIG to SHM members. There are many ways to do this, including applying to serve on a committee, getting involved in a chapter, being active on social media or in an online HMX community, or serving in a national leadership role such as speaking at a conference or presenting academic work.

SIG Leaders should promote these opportunities to members, especially those who demonstrate an interest in becoming more involved. Not only will the member benefit from the experience, but the SIG will have increased visibility and representation. Here are some ideas to help SIG Leaders:

- Establish opportunities for members to get involved, such as leadership positions in the SIG;
- Solicit feedback for roundtable discussions, webinar topics and speakers, types of engagement events, and resources that are of interest to members;
- Start discussions in the SIG's HMX Community to get members communicating virtually;
- Provide updates or summaries of SIG meetings in the SIG's online HMX Community;
- Establish recurring or pre-scheduled Leadership meetings so SIG leaders are prepared to participate on a regular basis (generally Monday-Friday, between 12 p.m.-5 p.m. ET/11 a.m.-4 p.m. CT/10 a.m. - 3 p.m. MT/9 a.m.-2 p.m. PT);
- Hold frequent and, at minimum, quarterly member-wide engagement opportunities at times that are convenient for members (generally Monday-Friday between 12 p.m.-5 p.m. ET/11 a.m.-4 p.m. CT/10 a.m. - 3 p.m. MT/9 a.m.-2 p.m. PT).



SIG Structure

SIG Leadership

Every SIG needs a solid foundation upon which it can grow and develop into a strong SIG. This section provides suggestions on effective SIG leadership management strategies.

Establishing Your Leadership Team

Whether you are in the first stages of structuring your SIG or are simply looking for new ideas on revitalizing your leadership team, a sound structure can ensure that the SIG will meet its goals while giving a larger number of members the opportunity to become involved. The SIG should continually strive to maintain a leadership structure that enables it to carry out its business in an efficient manner while providing for continuity of leadership and, at a minimum, meets the criteria outlined in this handbook.

Requirements

Although each leadership position within a SIG may operate differently, all SIG Leaders must meet the following requirements:

- Must be a current, dues-paying member of SHM throughout their term of office;
- Must demonstrate dedication to SHM and the SIG's goals and objectives and be willing to effectively execute the duties and responsibilities of the position;
- Pledge to make themselves available to attend all required meetings (determined by the SIG).

SIG Leadership Positions and Selection of Leadership

Leadership Election Procedures

There are a variety of election and appointment procedures in use throughout SIGs. In general, leadership transitions should take place around SHM Converge as SHM's operational and volunteer leadership calendar operates on an annual conference to annual conference basis. Your SIG's bylaws should document how and when leaders will be elected to ensure truth-in-voting procedures and to establish continuity of leadership from year to year.

Timing

Whatever process for elections or leadership selection the SIG chooses, they should align with SHM's annual conference so that terms start and end at this time. This creates uniformity across all SHM volunteer leadership opportunities.

Call for Nominations

All dues-paying members in the SIG should be given the opportunity to nominate them self or others for open SIG leadership positions. The SIG should consider whether it would like nominees to submit a CV and/or letter of intent to review and/or include with the ballot. The recommendation is to hold a call for nomination at least three months prior to the next annual conference and for the election to be conducted no later than at the annual conference.

Term of Office

SIG Leaders must establish terms of office for each position and include them in the SIG's bylaws or position descriptions. Leadership terms may or may not be renewable. The following terms are recommended but not required:

Chair

One-year term, renewable once or twice, but the total time served should not exceed three years.

Vice-Chair

One-year term, renewable once or twice, but the total time served should not exceed three years. This role should be understood to ascend to chair and the positions should mirror one another in term lengths and timing of transition.

Immediate Past Chair

Non-renewable role that mirrors the terms and timing of the chair's term.

Secretary

One-year term, renewable once or twice, but the total time served should not exceed three years and mirrors the terms and timing of the chair and vice-chair. This role can ascend to vice-chair but it is not mandatory.

Leadership

One-year renewable term without limit; SIGs should strive for a Leadership size of about ten to twelve members (Please note the overall number is flexible and should reflect a number that allows for the SIG to govern itself properly and ensure long-term success.).

Election Procedures

Elections are the responsibility of the SIG leadership to conduct. The SIG must be transparent in the process for selecting its leadership and all currently active dues-paying members of SHM, who are members of the SIG, must be granted the opportunity to take part in the SIG's leadership selection or approval process. It is recommended that the SIG use HMX for this process and the election procedures should be documented in the SIG's HMX Community and/or Governance Document.

SIGs should also consider procedures for removing non-performing leaders from office, as well as the process for filling vacancies that occur outside of the regular leadership selection cycle or process.

Creating Position Descriptions

After the SIG's leadership structure has been determined, formal written descriptions for each position should be created and implemented. Written position descriptions will reduce confusion, ensure that all duties are completed by SIG leadership, and establish accountability. Some additional positions to consider would be: Engagement, Communications, Membership, and/or Education Officer. Position descriptions should be reviewed and shared upon the announcement of each election and during the submission of the Yearly Governance Plan.

Developing a SIG Governance Structure and Bylaws

While it is generally a best practice, SIGs are not required to adopt their own bylaws or governance criteria beyond those outlined in this handbook. It is up to the SIG's leadership to set the direction and create an atmosphere of group cohesiveness to achieve the SIG's goals. If a SIG

wishes to adopt bylaws, it may reach out to SHM staff for guidance or assistance. SHM also recommends SIGs talk to each other to share information.

Setting SIG Goals

The SIG Leadership should determine what accomplishments it would like to achieve during the current year. A SIG Activity Plan and SIG Activity Report should be submitted each year to ensure SIGs can be evaluated according to the SIG Health Metrics Rating. SIGs should monitor their goals throughout the year and will be prompted, by staff, to report on their successes and struggles biannually. SHM staff will help keep SIGs on track to meet their annual goals. To be clear, SIGs should not be focused on creating content or resources but rather on identifying and sharing current resources pertinent to the SIG and providing opportunities for networking to its SIG members. If there is a recognized gap in knowledge or resources, the SIG should not immediately attempt to enlist its volunteers to create a resource or product to fill the void but address it in a manner that does not burden or strain volunteers or staff.

Planning Leadership Meetings

The SIG should specify the frequency of SIG meetings, while at least meeting the minimum criteria of quarterly Leadership meetings. Meetings should be used to plan upcoming events and communicate important initiatives; report on previous activities and delegated tasks; and measure progress towards annual goals.

Leadership Training for New Leaders

SHM does not currently have a formal training program for SIG Leaders. It is recommended that current SIG Leaders identify future SIG Leaders and serve as mentors to them. A best practice is to outline the expectations for SIG Leaders both verbally and in writing. It is vital for SIGs to identify potential future leaders and provide them with opportunities to grow into larger roles within the SIG, ensuring continuity in leadership.

There is no set timeline for a training period but, at a minimum, it should be conducted around the time at which election results are announced and certainly prior to the SIG's new leadership transition.

SIGs should utilize this handbook as a tool for their new leaders.

Finances

Special Interest Groups do not have an SHM-approved budget. SIGs are intended to operate through volunteer leaders who donate their time and are supported by SHM staff.

Member Engagement

SIG Engagement Activities

A successful SIG should aim to provide value by growing both SIG and SHM membership. It should also work to engage and retain both SIG and SHM members. SIGs should present members with opportunities to engage with the SIG via a variety of enriching activities. This section provides examples of activities that SIGs may consider (see next page). The section also offers strategies to increase visibility, gain support, and increase member involvement.

Guidelines for SIG Engagement Activities

- A minimum of three (3) engagement events (inclusive of the SIG's Special Interest Forum) for the term between annual conferences;
- Must be inclusive and allow for all SIG and SHM members to participate;
- SIG Leadership meetings that are open to all members and go beyond the business or operationalization of the SIG (please note that closed SIG Leadership meetings are not eligible to be counted as SIG engagement activities).

Plan a Variety of Interesting Activities for Your SIG Members

Non-CME Educational Webinars

Rotate the topics and speakers to keep SIG members interested. Using HMX and the Special Interest Forums (SIFs) are a great way to engage with members, market the webinars, and hear what topics they would like to see discussed.

RoundTable/Expert Led Discussions

SIGs may host 45-minute to one-hour calls focused on a relevant topic of interest. This activity can be an opportunity for SIG members to engage with one another in relation to a specific idea or problem that they are looking to garner responses to or just to connect with a loose agenda that promotes networking and an "open forum" to bring up relevant and pertinent topics related to the scope of the SIG.

Career-Focused Meetings

Have a virtual job fair or host a panel of hospitalists from the health systems in your SIG to talk about local opportunities and/or how to advance one's career.

Twitter Chats

Engage SIG members on Twitter by moderating a discussion on a specific and relevant topic. Prompts may be used to solicit ideas and techniques used by members. Transcripts of the chat can be saved and posted on HMX so those who could not attend may benefit from the discussion.

Membership Drives and Networking Meetings

Host a meeting to talk about the value of SHM membership, the benefits, national meetings, and engagement and networking opportunities. Possible topics to highlight include achieving/obtaining Fellows and Senior Fellows designations, submission of talks to local chapters, track sessions at SHM Converge, SHM's Annual Conference, and submission of abstracts to the Research, Innovations and Clinical Vignettes Competition at both the Chapter and National Conference level.

Pursuing Non-Sanctioned SIG Activities

The activities outlined above are pre-approved items that fall within a SIG's scope of activities. If a SIG would like to pursue other work, goals, or deliverables, the SIG must complete an issue briefing guideline that clearly defines the goal and deliverable and outlines the process the SIG will follow, as well as what resources will be necessary to accomplish the goal. Issue briefings will be reviewed on a quarterly basis.

Activity Planning Tips

SHM SIGs can boost their membership numbers and participation by coordinating events for their members. SHM's most successful SIGs offer a variety of events to meet members' needs.

Plan ahead and plan early

Events succeed by planning well in advance of the event. It helps to have input from SIG members prior to the event or activity to ensure relevance and interest. SIG Leaders can utilize the SIG's HMX Community to survey members on topics that are of interest to them. Speakers, panelists, representatives, and members will need advanced notice. It is recommended that activities be announced no less than four to six weeks prior to the event. Planning should start even sooner.

Advertising/Recruiting

Plan to advertise the SIG meeting or event in the SIG's community on HMX and on the HMX calendar of events.

Follow up on the details and thank the participants

Send written confirmations to speakers. After the meeting or event, send a thank you message to anyone who donated time, knowledge, and/or resources as they will be more likely to help again in the future.

SHM Converge Special Interest Forums (SIFs)

Each SIG that is in good standing will be provided the opportunity to have a Special Interest Forum (SIF) during SHM Converge. While SIG Leader attendance is not mandatory at SHM Converge, SIGs should have a plan for their SIF agenda and designate at least one SIG leader be present and manage the SIF.



Technology

SIG Web Presence

SIGs are prohibited from creating individual websites or social media accounts. To maintain the SHM brand, the SHM website, web domains, and HMX platforms are the only virtual spaces that should feature SIG information. SIGs are encouraged to review SHM's virtual areas and domains where SIGs are highlighted and provide staff with updates that may need to be made to maintain consistency with the group's scope and focus.

A SIG's community page is created in SHM's Hospital Medicine Exchange (HMX) upon inauguration of the SIG. All SIG HMX Community pages follow a uniform template. SHM staff will assist SIG Leaders with the maintenance of relevant content on each SIG page. Please visit the [HMX Frequently Asked Questions \(FAQ\)](#) page in HMX for help on navigating HMX and maintaining SIG community pages.

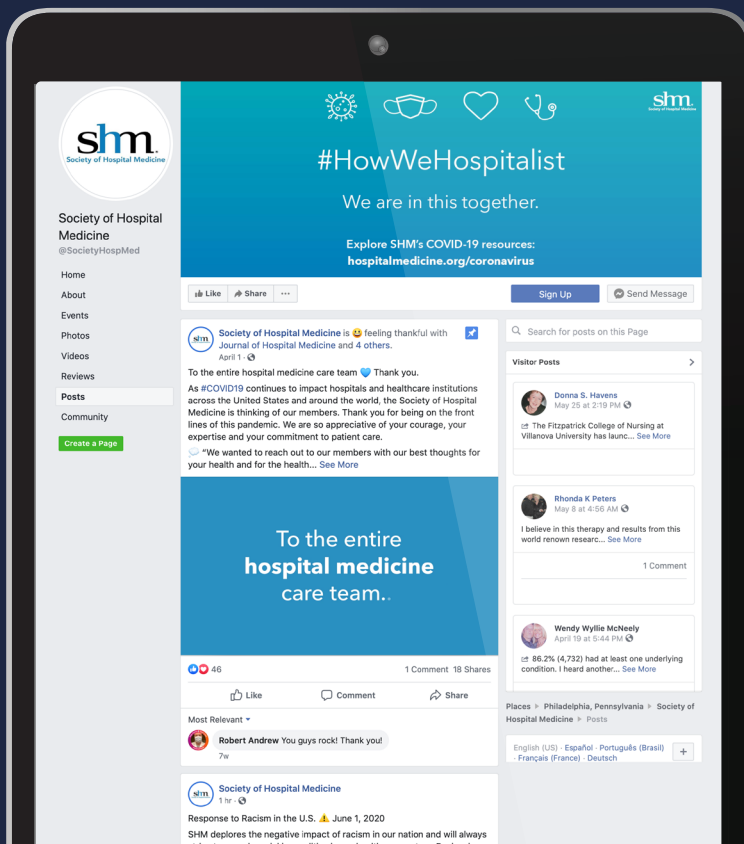
Updates to Submit to SHM Staff:

- **Updated SIG Leader Information:** Staff will add and remove leaders to SIG community pages.
- **Governance Information:** Should the SIG create bylaws and/or call for nomination documents, they should be sent to staff for storage in the SIG's files as well as in the online SIG Library found within the SIG HMX Community. SIG Leaders are also welcomed to share the documents in their respective community through the Discussion feature.
- **SIG Events:** SIG leadership should communicate with SHM staff about any events or meetings they plan to hold. SHM staff will deploy email calendar invitations to the SIG's Leadership roster and any approved and confirmed guest speakers (if applicable). This will happen prior to each SIG meeting (or once for a recurring series) or event. In addition, SIG program staff will ensure events appear on the [HMX Event Calendar](#). SIG Leaders should ensure a post about the event is made in the SIG's community and may also post in the Open Forum. They should refrain from posting the SIG events across all SIG Communities, however, posting within SIGs that share interest in the event's content is acceptable if that SIG is a partner in planning the event or its leadership was consulted regarding interest in the subject matter or topic prior to the event being planned.

Updates That SIG Members Can Make:

- **SIG Meeting Updates:** SIG Leaders should post updates about their meetings, including agendas and minutes, through the Discussion feature on the SIG's HMX Community page.
- **Direct Communication with the SIG:** We encourage all members, especially SIG Leaders, to start conversations relevant to the SIG on the SIG's HMX Community page and directly between members; share updates regarding the SIG's activities; and news and information relevant to the scope of practice or interest(s) of the group.
- **Photos:** SIG Leaders should add a photo of themselves to their HMX profile and photos of SIG events to the SIG's HMX Community page.
- **Invitations:** Invite members to join the SIG's HMX Community through the HMX invite feature.

Any communication regarding SIG-related information for raising awareness of events or seeking input from SIG members should take place expressly via HMX. Prior approval from SHM staff and leadership is required for any communication outside the platform.



@SocietyHospMed

Social Media

SHM uses social media to distribute content, drive member engagement, support organizational goals, and communicate the role of hospitalists in healthcare. Management of SHM's social media identity is a core function of SHM's Communications Department. SHM encourages the creative and responsible use of social media by staff, leaders, members, and others to further engage SHM members and the public.

To refrain from sharing competitive content to SHM's membership, avoid conflicts of interest, and ensure that all social media channels associated with SHM share the same goals, SIG Leaders must adhere to the following guidelines:

- SHM SIG Leaders *may not* create SIG-specific social media profiles on any social networking platforms (including but not limited to Facebook, Twitter, Instagram, SnapChat, and TikTok), professional networking sites (LinkedIn), personal blogs, microblogs (i.e., Tumblr), podcasts, online collaborative forums and message boards (such as WhatsApp), streaming and online video platforms (such as Twitch), media repositories (YouTube, Flickr), and crowdsourced sites (Wikipedia).
- SIG Leaders and members may tag and reshare content from SHM's social media accounts, @SocietyHospMed on **Twitter** or **Instagram** and "Society of Hospital Medicine" on **Facebook** or **LinkedIn**, for the opportunity to have their posts shared or retweeted. The decision to share or retweet to SHM's followers is left to the discretion of SHM's Communications Department.
- SIG Leaders and members may use the hashtag #SHMSIGS to create a network of consolidated SHM SIG contributions within the conversation on the platform being used.
- SIG Leaders and members may also choose to use topically and professionally appropriate hashtags to bring their messages into the conversation across the platform being used.

Appendix

SIG Roles & Responsibilities

SIG Governance Document

SIG Yearly Activity Plan

SIG Mid-Year Activity Report

SIG Health Metrics

Guidelines for Volunteer Leader Requests

sm MEMBERSHIP
Special Interest Groups

SIG Roles & Responsibilities

ALL MEMBERS

- Focus on the best interests of SHM and the SIG over personal interests
- Disclose all real or perceived conflicts of interest as they arise

Chair

- Attend and participate in council meetings and teleconferences
- Develop meeting agendas and post them in HMX
- Assist SHM Staff Liaison in coordinating meeting and teleconference dates and post them in HMX
- Oversee and approve the minutes of SIG meetings and post them in HMX
- Assign responsibilities to council members
- Set deadlines for completion of assigned responsibilities
- Compile reports and required documents concerning SIG governance and activity when prompted by SHM Staff Liaison
- Complete and/or oversee formal requests for support on projects or goals requiring SHM Board approval
- Communicate to the entire council on actions and decisions of the SHM Board regarding SIGs

Vice-Chair (Chair-Elect)

- Attend and participate in council meetings and teleconferences
- Work with chair to lead SIG
- Assist in development of meeting agendas
- Serve as acting chair if/when chair unavailable

Secretary

- Responsible for helping to prepare and post meeting and teleconference agendas to HMX
- Responsible for recording and posting meeting and teleconference minutes to HMX
- Assist in sharing necessary documents with SIG

Leadership

- Attend and participate in council meetings and teleconferences
- Prepare for meetings by reviewing agenda and reading background materials
- Respond in a timely fashion to requests for information from the chair
- Keep a pulse on postings in HMX and respond to requests/questions
- Complete all assignments in a timely fashion
- Present new project ideas and be community leader
- Identify opportunities to initiate or participate in ongoing projects/goals
- Communicate with peers in HMX
- Sign up to become member of SIG
- Attend and participate in council meetings and teleconferences

Staff Liaison

- Attend and participate in SIG meetings and teleconferences
- Assist SIG chair in coordinating meeting and teleconference dates and times
- Provide support for scheduling SIG meetings and teleconferences via email calendar appointments for SIG
- Share relevant news and updates concerning the SIG program and SHM
- Provide access to tools and best practices necessary for SIG success
- Possess a working knowledge of HMX to provide support to SIG members
- Be conduit for communication between SIG and SHM Leadership – i.e., CEO and Board of Directors

Updated Spring 2024 Society of Hospital Medicine SIG Handbook Appendix II

sm MEMBERSHIP
Special Interest Groups

SIG Governance Document

SIG Leadership

| Position | First Name | Last Name | Email |
|---|------------|-----------|-------|
| Chair | | | |
| Vice-Chair | | | |
| Secretary | | | |
| Membership Committee Representative (if applicable otherwise N/A) | | | |
| SHM Staff Liaison | | | |

Self-Proposed SIG Leadership Terms

| Position | First Name | Last Name | Email |
|---|------------|-----------|-------|
| Chair | | | |
| Vice-Chair | | | |
| Secretary | | | |
| Membership Committee Representative (if applicable otherwise N/A) | | | |
| SHM Staff Liaison | | | |

SIG Meeting Structure and Frequency Plan (Annual Conference to Annual Conference)

Updated Spring 2024 Society of Hospital Medicine SIG Handbook Appendix II

sm MEMBERSHIP
Special Interest Groups

SIG Yearly Activity Plan

SIG Leadership

| Position | First Name | Last Name | Email |
|---|------------|-----------|-------|
| Chair | | | |
| Vice-Chair | | | |
| Secretary | | | |
| Membership Committee Representative (if applicable otherwise N/A) | | | |
| SHM Staff Liaison | | | |

Proposed SIG Activities (continued)

| Activity 2 | Objective |
|------------|-----------|
| Activity 2 | |
| Activity 3 | |
| Activity 3 | |
| Activity 4 | |
| Activity 4 | |
| Activity 1 | |
| Activity 1 | |
| Objective | |

Proposed SIG Activities

| Position | First Name | Last Name | Email |
|-------------------|------------|-----------|-------|
| Chair | | | |
| Vice-Chair | | | |
| Secretary | | | |
| Leadership Member | | | |
| Leadership Member | | | |
| Leadership Member | | | |
| Leadership Member | | | |
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| Leadership Member | | | |
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| Leadership Member | | | |
| Leadership Member | | | |
| Leadership Member | | | |

Updated Spring 2024 Society of Hospital Medicine SIG Handbook Appendix III

sm MEMBERSHIP
Special Interest Groups

SIG Health Metrics

| LEVEL | DESCRIPTION |
|---------------|--|
| GREEN | <p>Leadership The SIG has a minimum of a chair, a vice-chair, and a secretary with defined roles and a succession plan.</p> <p>Composition The SIG has a leadership of at least six (6) members for SIGs who have been established for two years or more. SIGs who are less than two years old should have a minimum of eight (8) members (as required on the application for establishment).</p> <p>Engagement The SIG holds, at minimum, quarterly Leadership meetings and/or calls and quarterly SIG membership activities or engagement opportunities.</p> <p>Administration The SIG has submitted the following documents to the staff liaison for review by the SIG Program Manager and the Membership Committee before being sent to the Board of Directors: • Governance Document and Activity Plan between six and eight weeks post-SHM Convergence</p> |
| YELLOW | <p>Leadership The SIG does not have a Leadership of at least six (6) members for SIGs who have been established for two years or more. SIGs who are less than two years old should have a minimum of eight (8) members (as required on the application for establishment).</p> <p>Composition The SIG does not have an Executive Council of at least five additional members (eight total EC members).</p> <p>Engagement The SIG does not hold, at minimum, quarterly Leadership meetings or calls and/or quarterly membership activities or engagement opportunities.</p> <p>Administration The SIG has not submitted the following documents to the staff liaison for review by the SIG Program Manager and the Membership Committee before being sent to the Board of Directors: • Governance Document and Activity Plan between six and eight weeks post-SHM Convergence</p> <p>Once a SIG has been rated Yellow, it will have up to six weeks prior to the next SHM Convergence, SHM's Annual Conference, to meet the requirements to be rated Green. If the SIG does not meet those qualifications and is rated Yellow for a second consecutive year, it will move into Red Health Status.</p> |
| RED | <p>The SIG has not met any leadership, composition, engagement, or administration requirements for two consecutive years and does not show signs of improvement. Once the SIG has become Red, it will be dissolved, lose staff support, and become dormant.</p> <p>Dormant status means the SIG will:</p> <ul style="list-style-type: none">No longer have a staff liaisonHave its SIG HMX Community transitioned to an HMX Forum – where targeted topical conversations can still take placeRequire any current or future volunteer leaders interested in reviving the SIG to reapply for re-establishment of the SIG and submit it to the Membership Committee for review. |

*Governance Document MUST be submitted to be considered for a Special Interest Forum (SIF) at the next SHM Convergence, SHM's Annual Conference, regardless of current health metric rating.

Updated Spring 2024 Society of Hospital Medicine SIG Handbook Appendix IV

sm MEMBERSHIP
Special Interest Groups

Guidelines for Volunteer Leader Requests

This outline is a guide for SIG volunteers and other key leaders responsible for presenting matters for consideration/action by the SHM Leadership. These guidelines are adapted from *Achieving Excellence in Association Governance* published by the American Society of Association Executives (ASAE).

- DEFINE THE ISSUE.** In one paragraph, define the issue/ describe the problem/articulate the question being addressed and brought to the SHM Leadership.
- DESCRIBE THE STRATEGIC NATURE OF THE ISSUE.** In one paragraph, describe why this issue is important strategically. How does the issue relate to achieving the strategic objectives of SHM?
- IDENTIFY WHAT ACTION IS REQUESTED.** Briefly describe what action SHM is being requested to take. For example, adopt a policy statement, revise a current policy, adopt a position on a piece of legislation, endorse a project, update webpage on collateral or promotional material, communicate with an external organization, etc.
- DISCUSS THE IMPLICATIONS OF THE ISSUE AND THE ACTION REQUESTED.** What are the implications of the issue for SHM and/or its members? What are the advantages and disadvantages of the requested action? What are the implications of action OR no action? Is there a potential financial impact? If so, can costs be estimated?
- IDENTIFY THE CRITICAL QUESTIONS.** What are the key questions SHM Leadership will debate during discussion that will assist in reaching resolution of the issue? What other considerations should SHM Leadership be aware of as they prepare?
- OTHER INFORMATION.** What other resources might assist SHM Leadership to prepare for this discussion? Identify and/or circulate related material (preferably from similar organizations) to provide background that would be helpful.

PROCESS FOR SUBMISSION

- Members should have a dialogue within their constituency leadership structure regarding perceived issues or requests for decisions from SHM's Leadership. ONLY issues that have the full support of a constituency group should be submitted for consideration. Please note that requests from single individuals will not be reviewed.
- Discuss all issues with the SIG's SHM staff liaison prior to developing an issue brief to determine the likelihood of possible overlap with other constituency groups.
- Draft a request that outlines all points above and share with the SIG's SHM Staff Liaison.
- Issues will be reviewed and considered on a quarterly basis by SHM Leadership. SIG program staff can provide the schedule and deadlines for submission.

Updated Spring 2024 Society of Hospital Medicine SIG Handbook Appendix V

SIG Roles & Responsibilities

ALL MEMBERS

- Focus on the best interests of SHM and the SIG over personal interests
- Disclose all real or perceived conflicts of interest as they arise

Chair

- Attend and participate in council meetings and teleconferences
- Develop meeting agendas and post them in HMX
- Assist SHM Staff Liaison in coordinating meeting and teleconference dates and post them in HMX
- Oversee and approve the minutes of SIG meetings and post them in HMX
- Assign responsibilities to council members
- Set deadlines for completion of assigned responsibilities
- Compile reports and required documents concerning SIG governance and activity when prompted by SHM Staff Liaison
- Complete and/or oversee formal requests for support on projects or goals requiring SHM Board approval
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- Attend and participate in council meetings and teleconferences
- Work with chair to lead SIG
- Assist in development of meeting agendas
- Serve as acting chair if/when chair unavailable

Secretary

- Responsible for helping to prepare and post meeting and teleconference agendas to HMX
- Responsible for recording and posting meeting and teleconference minutes to HMX
- Assist in sharing necessary documents with SIG Leadership

SIG Leadership Members

- Attend and participate in council meetings and teleconferences
- Prepare for meetings by reviewing agenda and reading background materials
- Respond in a timely fashion to requests for information from the chair
- Keep a pulse on postings in HMX and respond to requests/questions
- Complete all assignments in a timely fashion
- Present new project ideas and be community leader

At-Large Members

- Communicate with peers in HMX
- Sign up to become member of SIG
- Identify opportunities to initiate or participate in ongoing projects/goals
- Attend and participate in council meetings and teleconferences

Staff Liaison

- Attend and participate in SIG meetings and teleconferences
- Assist SIG chair in coordinating meeting and teleconference dates and times
- Provide support for scheduling SIG meetings and teleconferences via email calendar appointments for SIG Leadership
- Share relevant news and updates concerning the SIG program and SHM
- Provide access to tools and best practices necessary for SIG success
- Possess a working knowledge of HMX to provide support to SIG members
- Be conduit for communication between SIG and SHM Leadership – i.e., CEO and Board of Directors

SIG Governance Document

SIG Leadership

| |
|---|
| Chair |
| Vice-Chair |
| Secretary |
| Membership Committee Representative (if applicable otherwise N/A) |
| SHM Staff Liaison |

Self-Proposed SIG Leadership Terms

SIG Roster

| Position | First Name | Last Name | E-mail |
|-------------------|------------|-----------|--------|
| Chair | | | |
| Vice-Chair | | | |
| Secretary | | | |
| Leadership Member | | | |
| Leadership Member | | | |
| Leadership Member | | | |
| Leadership Member | | | |
| Leadership Member | | | |
| Leadership Member | | | |
| Leadership Member | | | |
| Leadership Member | | | |
| Leadership Member | | | |

SIG Meeting Structure and Frequency Plan (Annual Conference to Annual Conference)

SIG Yearly Activity Plan

SIG Leadership

| |
|---|
| Chair |
| Vice-Chair |
| Secretary |
| Membership Committee Representative (if applicable otherwise N/A) |
| SHM Staff Liaison |

Proposed SIG Activities (continued)

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|------------|
| Activity 2 |
| Objective |
| Activity 3 |
| Objective |
| Activity 4 |
| Objective |

Proposed SIG Activities

| |
|------------|
| Activity 1 |
| Objective |

SIG Roster

| Position | First Name | Last Name | E-mail |
|-------------------|------------|-----------|--------|
| Chair | | | |
| Vice-Chair | | | |
| Secretary | | | |
| Leadership Member | | | |
| Leadership Member | | | |
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| Leadership Member | | | |
| Leadership Member | | | |
| Leadership Member | | | |

SIG Health Metrics

| LEVEL | DESCRIPTION |
|---------------|--|
| GREEN | <p>Leadership The SIG has a minimum of a chair, a vice-chair, and a secretary with defined roles and a succession plan.</p> <p>Composition In addition, the SIG Leadership should consist of a minimum of six additional members for SIGs who have been established for two years or more. SIGs who are less than two years old should have a minimum of eight (8) members (as required on the application for establishment).</p> <p>Engagement The SIG holds, at minimum, three (3) SIG Leadership meetings and/or calls and three (3) SIG membership engagement activities or engagement opportunities for the term.</p> <p>Administration The SIG has submitted the following documents to the staff liaison for review by the SIG Program Manager before being sent to SHM Leadership:</p> <ul style="list-style-type: none"> • Governance Document* and Activity Plan no later than eight (8) weeks post-SHM Converge |
| YELLOW | <p>Leadership The SIG does not have all three positions of chair, vice-chair, and secretary with defined roles and succession plan.</p> <p>Composition The SIG does not have an additional six (6) or more members for SIGS who have been established for two years or more. SIGs who are less than two years old should have a minimum of eight (8) members (as required on the application for establishment).</p> <p>Engagement The SIG does not hold, at minimum, three (3) SIG Leadership meetings or calls and/or three (3) membership engagement activities or engagement opportunities for the term.</p> <p>Administration The SIG has not submitted the following documents to the staff liaison for review by the SIG Program Manager before being sent to SHM Leadership:</p> <ul style="list-style-type: none"> • Governance Document* and Activity Plan no later than eight (8) weeks post-SHM Converge <p>Once a SIG has been rated Yellow, it will have up to six weeks prior to the next SHM Converge, SHM’s Annual Conference, to meet the requirements to be rated Green. If the SIG does not meet those qualifications and is rated Yellow for a second consecutive year, it will move into Red Health Status.</p> |
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3. **IDENTIFY WHAT ACTION IS REQUESTED.** Briefly describe what action SHM is being requested to take. For example: adopt a policy statement, revise a current policy, adopt a position on a piece of legislation, approve a project, update verbiage on collateral or promotional material, communicate with an external organization, etc.
4. **DISCUSS THE IMPLICATIONS OF THE ISSUE AND THE ACTION REQUESTED.** What are the implications of the issue for SHM and/or its members? What are the advantages and disadvantages of the requested action? What are the implications of action OR no action? Is there a potential financial impact? If so, can costs be estimated?
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6. **OTHER INFORMATION.** What other resources might assist SHM Leadership to prepare for this discussion? Identify and/or circulate related materials (potentially from similar organizations) to provide background that would be helpful.

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2. Discuss all issues with the SIG's SHM staff liaison prior to developing an issue brief to determine the likelihood of possible overlap with other constituency groups.
3. Draft a request that outlines all points above and share with the SIG's SHM Staff Liaison.
4. Issues will be reviewed and considered on a quarterly basis by SHM Leadership; SIG program staff can provide the schedule and deadlines for submission.

shm[®]

MEMBERSHIP

Special Interest Groups

shm[®]

Society of Hospital Medicine