



Lend a Hand

The program, which is being offered to county medical societies with 100 or fewer members (including medical students and residents), was created to assist county medical societies with the membership application approval process.

II. Resources for CMSs

1. Lend a Hand Program

In recognition of the efforts of county medical society leaders who spend their free time on the critical task of membership processing, the TMA Membership Department, in conjunction with the TMA Committee on Membership, has developed the Lend a Hand Program. The program, which is being offered to county medical societies with 100 or fewer members (including medical students and residents), was created to assist county medical societies with the membership application approval process.

TMA Membership Department will provide the following services free of charge:

- Disseminate membership applications to potential members,
- Collect completed applications and appropriate dues,
- Verify that the applicant has met the licensure requirement for membership eligibility (verification of any other application information required by the CMS will need to be completed by CMS officers), and
- Send the application to the county society for review and approval by its board of censors and executive board.

Approval of membership, however, will continue to be determined at the county medical society level, in accordance with the TMA Bylaws.

In addition, as of November 1998, ***circulation of the names of applicants to society members is no longer required for membership in TMA.*** Circulation of names is now at the discretion of the local county medical society. Therefore, societies that choose to have the names of applicants circulated by TMA will be charged for related printing and postage costs.

To be eligible to participate in the Lend a Hand Program, a county medical society must:

- Have 100 or fewer members, including medical students and residents, and
- Agree that the only information on the application form to be verified by TMA is the status of the applicant's Texas license. The officers of the county medical society must complete the verification of any other information that is required by the county medical society.

2. TMA Resources and Support

Grassroots activity has been the cornerstone of TMA's success throughout the years. Key to this success are the local viability, presence, and services at the county medical society level. TMA offers a wide variety of services to help county medical societies show value locally. They range

from marketing and membership support to technology, business, and administrative support.

Please feel free to give us a call to discuss any of your specific needs (even those not on this list). TMA staff stand ready to assist you in any way that we can.

Administrative Support

TMA Contact: Michael Hebert, Director of Membership Operations, (512) 370-1430 or michael.hebert@texmed.org

- Dues collection and processing
- Membership application processing
- Data requests
- Demographic updates
- Maintaining membership database
- Custom report writing
- Onsite and remote training and support
- iMIS association management database
- Custom reports
- Custom software and reporting solutions
- Create, host, and provide technical support for CMS websites
- Implementation of new technologies

Financial and Business Support

TMA Contact: Steve Davis, Director of Finance, (512) 370-1490 or steve.davis@texmed.org

- Review financials
- Review QuickBooks entries and assist with complex accounting issues
- Reconcile bank and investment accounts on a monthly basis or as requested
- Assist with payroll issues and filing of required taxes
- Present financial information to CMS board as requested

Marketing Support

TMA Contact: Sylvia Salazar, Director of Membership Development, (512) 370-1433 or sylvia.salazar@texmed.org

- Strategic planning assistance
- Recruitment/Retention campaign help
- Speakers and CME for local events
- Co-branded targeted and mass marketing campaigns
- TMA staff presence at CMS functions and events
- Identification of newly licensed physicians
- Identification of key market segments (members and nonmembers)
- Assistance in identifying topical issues for recruitment of key segments
- Promotional giveaways
- Marketing and mailing services
- Print marketing materials
- Prepopulated membership applications
- Monitoring and reporting campaign results
- Design and graphics assistance

3. TMA Knowledge Center

Texas Medical Association Knowledge Center is your resource center, providing a vital link to the overwhelming growth of information in the field of medicine and health care. Knowledge Center staff are dedicated to answering questions on a wide variety of topics such as HIPAA, medical records, general legal issues, TMA membership, CME, TMA meetings, publications, and so on.

Library services also are available in the Knowledge Center. The physician reading room includes two computers with Internet access and a printer. Information specialists can answer many questions, and a librarian is available to assist members and staff with research. The Knowledge Center maintains a core collection of clinical and health business textbooks and journals, and full-text online resources such as MDConsult, Ebsco, and Stat!REF.

Knowledge Center staff include a director, two information specialists, a librarian with a master's degree in library and information science, the TMA switchboard operator, and a special collections coordinator who maintains the History of Medicine collection, exhibits, and TMA archives.

Knowledge Center Contact Information

Texas Medical Association
Knowledge Center
401 W. 15th St.
Austin, TX 78701-1680
(800) 880-7955
or (512) 370-1550
E-mail: knowledge@texmed.org
www.texmed.org

Resource Center

- Information specialists are available to take calls Monday through Friday, 8:15 am-5:15 pm.
- Ask a question online at knowledge@texmed.org.
- Search the TMA Knowledge Base for frequently asked questions at www.texmed.org.
- Phone number **(800) 880-7955**

Reference Services

- Clinical and health business reference, research, and document delivery including interlibrary loan
- History of medicine and TMA
- Genealogy research
- TexShare cards that allow members to check books out from any public university or library in Texas

TMA Website

- Electronic resources including members-only access to MDConsult's database of textbooks and journals
- Hot topics bibliographies
- Online catalog of books and journals
- Online order form for reference, interlibrary loan, and free knowledge alert service

4. TMA Ambassador Outreach Program

TMA Ambassador Outreach Program

Professional Support and Resources

Recognizing the important role of county medical societies (CMSs) in meeting member needs, keeping members aware of important issues impacting medicine, and furthering the advancement of organized medicine at the local level, TMA created the Ambassador Program. It is TMA's effort to implement and consistently schedule local activities with physicians via county medical society and other local market activities, e.g., through hospital medical staff meetings and large groups.

Additionally, TMA offers a wide range of services and resources to help local CMSs and their leaders maximize their effectiveness. This support includes a number of highly beneficial resources and direct services including:

- **TMA Staff Speakers.** TMA staff experts in all areas of health care, health law, practice management, medical economics, public health, and much more are available to speak to your local members. (See reverse side. Don't see your topic of interest on the list? No worries; with some advance notice, TMA can get you the right speaker.)
- **County Medical Society Leadership Forum.** This comprehensive one-day program for CMS presidents, presidents-elect, and CMS staff is held in conjunction with TMA Winter Conference to discuss issues, share expertise, and provide an update on state activities and resources.
- **Short-Term and Long-Range Strategic Planning.** Practical, hands-on help in developing long-range goals and objectives for local county medical societies.
- **Membership Recruitment, Marketing, and Retention Assistance.** Includes providing lists of members and nonmembers, developing recruitment campaigns specific to the county medical society, meeting and promotional assistance, creating marketing and membership materials, providing prepopulated membership applications and membership statistics, and tracking and reporting results.
- **County Medical Society Website Template.** TMA will build and help maintain the local CMS website including the Find a Physician search.
- **County Medical Society Assistance to Comply With Nonprofit/Association Policies.** TMA can help CMSs establish/update bylaws and set up an appropriate leadership structure that will meet state and federal law requirements as they initiate volunteer activities in their communities. TMA also can help guide efforts to ensure you are meeting fiscal and legal reporting requirements.
- **Administrative, Financial, and Business Service Support.** Various services and tools designed to enhance county medical society management practices and strengthen operations. This includes dues collection and processing, data requests, custom report writing, onsite and remote technology training and support, and financial technical assistance as needed.
- **County Medical Society Playbook.** A basic how-to manual for CMS leadership that includes topics such as board responsibilities, membership dues, and TMA resources. The playbook has "nuts-and-bolts" information to help leaders and county medical societies be successful in their activities.
- **County Medical Society Resources Webpage.** A webpage (www.texmed.org/campaignresources) of resources, tools, information, and other ideas to avoid reinventing the wheel, including best practices, activities, programs, and much more.

A county medical society may request assistance in a given area at any time, and TMA staff will work with the CMS to provide help as needed. Frequent topics of interest are issues before the state legislature, the latest changes in state and federal regulations impacting medicine, practice management activities and trends, human resource questions, and general CMS management issues. If you are new to county medical society leadership or if it's been a while since you checked out all the services that are available, we encourage you to contact us directly. **If we can assist you in any way, please contact Karen Matthews at TMA at (800) 880-1300, ext. 1448, or karen.matthews@texmed.org.**



Physicians Caring for Texans

T4476.03/11

TMA Expert Speakers

TMA's Ambassador Outreach Program will bring any of the following presentations right to you and your members for *free*.

TMA Ambassador Program Contact:

Karen Matthews, (512) 370-1448 or karen.matthews@texmed.org

Need More CME Options?

TMA has a number of additional CME opportunities designated as ethics and/or professional responsibility. Visit the Education section of the TMA website, www.texmed.org, to see a complete list.

Additional Professional Support:

- **Free reimbursement advice:** TMA mini-consults offer one-on-one assistance through 30-minute face-to-face consultations with reimbursement experts from TMA's Payment Advocacy Department on billing, coding, and payment issues. To schedule a mini-consult for your TMA physician members, contact Genevieve Davis at (800) 880-1300, ext. 1416, or genevieve.davis@texmed.org.
- **TMA's Physician Oncology Education Program (POEP):** To schedule a presentation on cancer prevention, screening, and early detection, or to learn more, contact Leslie Jones at (800) 880-1300, ext. 1671, or leslie.jones@texmed.org.
- **TMA's Committee on Physician Health on Rehabilitation*** offers several courses addressing topics such as physician drug or alcohol addiction, depression, cognitive impairment, and other problems that may disrupt professional and/or personal lives. To learn more, contact Linda Kubm at (800) 880-1300, ext. 1342, or linda.kubm@texmed.org.
- **TMLT Risk Management CME courses:*** Policyholders who complete a 2.5-hour risk management CME activity may be eligible for a 3-percent premium discount (up to \$1,000 per course) that will be applied to their next eligible policy period. To request a customized CME program for your group, contact Natalie Gilmore at (512) 425-5800 or natalie.gilmore@tmlt.org

* Fees may be involved. Call for details.

Already Have a Speaker, But Need CME?

Contact Patge Green at TMA at least 60 days in advance at (800) 880-1300, ext. 1447, or patge.green@texmed.org to obtain your CME.



Physicians Caring for Texans

Managing Your Practice

Presentation	AMA CME Credit
E-Prescribing	1 hour with ethics
Medical Records and the Texas Medical Board	Up to 3 hours with ethics
Creating a Winning Team	Up to 2 hours with ethics
Managed Care Contracts	Up to 2 hours
Electronic Medical Records Adoption, Incentives and Meaningful Use Update: Health Information Technology	1 hour with ethics
Do This Now: Health Care Reform Impact on Physician Practices	None
	1 hour with ethics

Medical Economics

Presentation	AMA CME Credit
Medicare Advantage Plans	None
Prompt Pay	1 hour
Economic Survival: Cost Analysis, Benchmarking, & Consumer Direct Care Reimbursement, Coding, and Claims	Up to 3 hours
Payment Advocacy	None
	1 hour

Professional Development

Presentation	AMA CME Credit
Take Charge of Your Interview: Media Training	2 to 4 hours with ethics
Take Charge of Testimony: Advocacy Training	2 to 4 hours with ethics
Physician Survey Results	None
Help: I'm Drowning in Debt	None
Technology and Patient Communication	1 hour with ethics
TMA General Business General Challenges, Access to Care, Reimbursement and Legislative Issues, and More	None
Employed Physicians	1 hour CME

Advocacy and Legislative Affairs

Presentation	AMA CME Credit
Implementation of State Legislative Healthcare Changes	1 hour with ethics
Medicare Policy and Advocacy	None
Tiered or "High Performance" Network Issues	None
Workers' Camp Update	None
Texas Legislative Session Update	1 hour with ethics
Federal Legislative Update	None

5. Payment Advocacy



Do You Ever Need Help Getting Claims Paid?

You already know that TMA works for you every day at the capitol, in the courtroom, with the health plans. But did you know that TMA offers remedies for your payment hassles ... free of charge?

TMA can help you get your claims paid, in a variety of ways convenient to you and your staff. We encourage you to take advantage of these free member benefits.

Hassle Factor Log Program

When TMA was named “America’s Best Medical Society” by *Medical Economics* in 2001, the Hassle Factor Log (HFL) program was cited as one of the main reasons for the honor. The program resolves claim-specific payment problems, and supports TMA’s efforts to improve claims processing through ongoing meetings with third-party payers. *To use the Hassle Factor Log, download the form from the TMA Web site at www.texmed.org/basslefactorlog.*

Carrier Meetings

Carrier meetings, in which TMA staff meet with health plans and other payers, give TMA members a unique opportunity to have their specific claims issues addressed. At the same time, TMA’s more global payment policy, contracting, and regulatory concerns are discussed. This program continues to expand as health care payment plans and their many complexities challenge the financial stability of physician practices. *Carrier meetings are scheduled based on information drawn from the Hassle Factor Logs. See above.*

Mini-Consultations

Do you need a face-to-face meeting with a TMA reimbursement specialist? TMA works with county medical societies to schedule mini-consults, where physicians and their staff discuss payment issues with the specialist, emphasizing practical solutions, education, and leave-behinds to help with future troubles. *To schedule a free mini-consult, contact your county medical society.*

Coding and Billing Hotline

This hotline is a great resource for physicians and staff who need immediate access to coding and billing information, as well as help with identifying problems and finding solutions. Certified coding staff provide knowledgeable answers to coding and billing inquiries of all kinds. *Call the coding and billing hotline at (800) 880-1300, ext. 1414.*

More Free Stuff at www.texmed.org

- **TMA Practice E-Tips** is an electronic newsletter with brief, practical tips for managing a medical practice in Texas. Sign up for e-tips at www.texmed.org/etips.
- **Medicare Part B Newsletter Index** lists Medicare topics and where to find them in the newsletters. Go to www.texmed.org/PartBNewsletter.
- **Medicaid Bulletin Index** lists Medicaid topics and where to find them in the bulletins at www.texmed.org/Medicaidindex.
- **Sample Letters to Carriers** help you appeal inappropriate claim denials using Texas Prompt Pay statutory language. You can find these on the TMA website at www.texmed.org/carrierletterappeals.
- **Billing Guidelines for Nonphysician Practitioners** tell you how to bill for the services of nurse practitioners, clinical nurse specialists, and physician assistants at www.texmed.org/NPPbilling.
- **TMA Knowledge Center** information specialists are dedicated to answering questions on a wide variety of topics from TMA meetings to general legal issues, and a librarian is available to assist members and staff with research. The Knowledge Center maintains a core collection of clinical and health business textbooks and journals, and full-text online resources such as MDConsult, Ebsco, and StatREF. Call (800) 880-7955 Monday through Friday, 8:15 am-5:15 pm, or ask a question online at knowledge@texmed.org. www.texmed.org
- **Action**, TMA’s monthly electronic newsletter, presents timely information about legal, economic, regulatory, and legislative affairs that Texas physicians need to know. Subscribe by logging on to the members-only section of the TMA website, then choosing “Update Your TMA Demographic Information (including newsletter subscriptions and preferences).” www.texmed.org

To learn more about any of these free services, contact a reimbursement specialist at (800) 880-1300, ext. 1414, or paymentadvocacy@texmed.org.



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Practice Management Services

6. Board Responsibilities

BOARD RESPONSIBILITIES

Serving on the Board of Directors is a rewarding and important responsibility. This guide informs volunteer leaders of the unique aspects associated with governing a not-for-profit organization.

*"The board governs ...
... the staff manages."*

Leadership: Volunteer leaders are responsible for the direction of the organization. The board governs, develops policy and sets a course for the future. Maintain focus on the mission and strategic goals --- avoid micro-managing the organization and staff. Functions (4):

- Governance
- Policy & Position Development
- Visionary – Future Focus
- Fiduciary

Management: Paid staff and contractors are responsible for the administration of the organization. Staff act as partners to the board, advancing the goals and strategies, while taking care of the daily administrative needs unique to nonprofit organizations.

Unique Terminology

Not-for-Profit refers to the legal corporate status of the organization. (It does not imply an exemption from paying or collecting state sales tax.) **Nonprofit** is the casual reference to Not-for-Profit.

Exempt Organization is a reference to the IRS designation exempting the organization from paying most federal income tax (with exception of UMBT - Unrelated Business Income Tax.)

IRS 501(c)(3) designation most often is referring to organizations with a religious, charitable, scientific or educational purpose.

IRS 501(c)(6) designation refers to trade associations, business leagues and professional societies.

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Board Responsibilities

1. Determine and advance the organization's mission and purposes.
2. Select the chief paid executive (*not staff*) as well as CPA and attorney.
3. Support the chief executive and assess performance periodically – usually measured against the strategic plan.
4. Ensure effective organizational planning.
5. Ensure adequate resources (funds, time, volunteers, staff, technology, etc.)
6. Resource and financial oversight.
7. Determine, monitor and enhance programs and services.
8. Promote the organization's image.
9. Ensure legal and ethical integrity and maintain accountability.
10. Recruit and orient new board members, and assess board performance.

(Adapted from The Responsibilities of Nonprofit Boards www.BoardSource.org)

Scrutiny of Nonprofits

In response to corporate scandals, government has increased scrutiny of boards of directors. Sarbanes Oxley (SOX) was adopted in 2002. In 2008 the SOX requirements were applied to nonprofits. Boards are expected to maintain their accountability, independence and transparency while governing. Policy questions in IRS Form 990 include:

- Audit and Audit Committee
- Whistleblower
- Compensation
- Document Destruction
- Conflict of Interest
- Public Records

Insurance and Volunteer Immunity

State and federal governments afford certain protection to volunteer leaders. While the volunteer may have some protection, the organization is still open for legal suits. Insurance coverages add further protection for volunteers and organization.

Directors and Officers (D&O) Liability may cover legal defense for employment, copyright, and antitrust claims, for instance.

General Liability insurance covers property damages and injuries relating to the organization.

Fidelity Bond covers losses resulting from fraudulent or dishonest acts committed by an employee.

Meeting Cancellation covers the loss of revenue due to a cancellation, curtailment, postponement because of weather, strikes, etc.

(Contact legal and insurance coverages for activities.)

Legal Principles

Duty of Care requires leaders to use reasonable care and good judgement in making their decisions on behalf of the interests of the organization.

Duty of Loyalty requires leaders to be faithful to the organization, avoiding conflicts of interest.

Duty of Obedience requires leaders to comply with governing documents (i.e. bylaws, articles of incorporation, policies, etc.)

Board Tools

Documents available to leaders (often in a **Leadership Manual**)

- Statement of Purpose (Mission)
- Articles of Incorporation
- Bylaws
- Policy Manual
- Strategic Plan
- Financial Statement - Budget
- Meeting Minutes
- Organizational Charts
- IRS Forms
- Frequently Asked Questions

Treat all information with **confidentiality**.

#1 lie — "You won't have to do anything when you get on the board!"

Board Responsibilities *(continued)*

Rules of Order

Agenda ensures that important business is covered and discussions are on topic.

Motions are proposals for action, beginning with, "I move we....."

A Second is required for the motion to be discussed.

Amendments may be made to most motions if they improve the intent or clarify the original motion.

Tabling lays the motion aside.

Calling the Question refers to ending the discussion and voting on the motion.

Voting is the official action after discussion to adopt, amend, kill or table the motion.

Minutes protect the organization by recording the time and location of the meeting, participants, and the outcome of the motions. They are not a place to record conversations, assignments, reports, etc. (Including reports and discussions can incriminate.)

Quorum is number of directors required to conduct business.

Recommended: "ABC's of Parliamentary Procedure" 800-477-4776

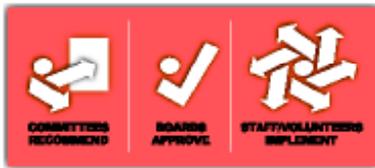
Committees

"Committees recommended by board approves staff and volunteers implement."

Organizations are streamlining - eliminating all but essential committees and aligning committee work with strategic goals.

Standing - identified in the bylaws, appointed annually, on-going committee work.

Ad Hoc - formed for specific or immediate needs and disbanded upon completion of work (a.k.a. Task Force)



High Performing Boards

"Mission Driven - Member Focused"

- **Accountable** and follow through for your commitments.
- Uphold governing documents and expectations.
- **Determined to be successful** - ENVISION SUCCESS.
- **Work as a team** - no individual has an agenda more important than the whole.
- **Value and build relationships** and respect diversity.
- **Focus on outcomes** and the impact the organization can have.

Common Sense

- a) **Prepare** for meetings, read, read, read!
- b) **Respect** the chairperson, agenda and rules of order.
- c) **Bring a calendar, start and end on time.**
- d) **Know the mission and goals.**
- e) **Listen more than you speak.**
- f) **Check personal and political agendas** at the door.
- g) **Respect confidentiality.**
- h) **You don't speak** for the organization without authority.
- i) **Support the board, don't bad-mouth** any action or person. (Dissenting votes may be noted in the minutes - not outside the meeting.)

Strategic Planning

A strategic plan focuses the board on mission and goals for 3 to 5 years. It serves as a roadmap. *Great board members can think beyond their term of office and outside their cone of expertise.*

Environmental Scan - review of external and internal influences on the organization, as well as strengths, weaknesses, opportunities and threats (SWOT).

Mission - statement about what the organization is; whom it serves, and the services it provides; short with ER value.

Vision - inspiring, long-term desired outcome; image of success.

Values - guiding principles of board and staff.

Goals - broad competencies to advance the mission. Usually just 3 to 7 so as not to exhaust resources, volunteers, staff.

Strategies - advance the goals; creative efforts to achieve the mission and serve stakeholders/members.

Action Steps - fit within the strategies; the actions, assignments, deadlines, etc. AKA annual "operating plan" or "business plan."

Plan Champion - the person (staff and/or volunteer) who keeps focus on the plan.

Risk Management

Protect the organization. Be aware of fiduciary responsibility, contracts, audit results, insurance, IRS requirements, values and ethics, apparent authority, antitrust, etc.

Public Records requests for the organization's annual federal tax return (Form 990, 990-BZ) must be made available for the last three years. Significant fines occur for noncompliance.

Antitrust Violations occur when two or more persons from the same industry or profession discuss suppliers, processes, prices or operations. Remove yourself from any conversation that would change how business is conducted because of an agreement among competitors.

Apparent Authority arises when a board chair, though not granting actual authority, permits a committee or chapter to behave as if it had authority. Authority rests with the chairman and may not be assumed by others.

Financial Audits usually to protect board and staff, relying on an audit committee to select, oversee and report on the process.

Conflicts of Interest disclosed at the start of the term and throughout the year.

Board Responsibilities - Laminated \$12 ea. or \$9 ea. for 3 or more + s/h
Order by e-mail bob@rchcae.com
Phone 850/570-6000
www.nonprofitcenter.com
335 Beard St., Tallahassee, FL 32303

Publications and Seminars
Association Self-Auditing Process - \$39
Building an Association Mgmt Co. - \$39
How to Write a Policy Manual - \$39
The Perfect Board by Cal Clemons - \$17

- Strategic Planning
- Board Development, Orientation
- Operational Audits; Systems
- Best Practices, Mgmt. Seminars

Bob Harris, CAE 7-09 © RCH

7. Sample Agenda

Call to Order

Welcome

Approve Minutes of Past Meeting

Action items from the last meeting

ACTION

Elections/Appointments

1. New members
2. New appointments (committees, etc.)
3. Open officer positions (follow bylaws)

ACTION

Old Business

1. From minutes
2. Unfinished or unresolved issues from past meetings

ACTION

New Business

1. Treasurer's report (record acceptance)
2. Committee reports
 - o Actions of executive committee (policy changes, spending projects, directions to delegate, or resolutions)
 - o Reports from committees
 - o Informational reports can be filed with the minutes
3. Report of the president
 - o Activities the president may have attended on behalf of the society
 - o Vision for future meetings, projects, policies, etc.
4. Report of the delegate to TMA
 - o Gather information from membership to take to TMA, ask for approval of resolutions to TMA or AMA
 - o Report First Tuesday, HOD meeting, overview of proceedings of HOD, and any other meeting done in the name of the society
 - o New or restated policies from TMA
 - o Vision

ACTION

ACTION

Other Business

1. Report from the alliance
2. New projects or problems to be addressed
3. Awards, announcements
4. Executive session (discuss issues not for guests or nonmembers, i.e., censorship, hospital or others relations problems, Texas Medical Board actions)

8. Sample Minutes

Meeting Minutes

Wharton CMS Executive Board

Jan. 3, 2010

Wharton County Medical Society was called to order by Dr. AA, president, at 6:12 pm Jan. 3, 2010, and a quorum was present. The minutes were approved with the following corrections:

1. One
2. Two

Two new members were recommended for membership by the Board of Censors and approved by the membership present. (List names +/- specialty, location.) Dr. BB retired from the Board of Censors, and Dr. CC was appointed by the president to finish the unexpired term.

Old Business: The second reading of the bylaws amendment was done, and the revisions were approved by the membership present. TMA lobbyist DD answered the question by phone that was raised at the previous meeting: The maximum donation to any congressional candidate is \$xxx.xx per election.

New Business: The attached treasurer report was approved, unanimously. The executive committee report was accepted after discussion of approval of \$xxx.xx to be spent for Hard Hats for Little Heads. There were no other action items in the reports of president or the delegate to TMA. There was detailed discussion about health system reform, but no conclusions were reached, and TMA socioeconomic staff will be invited to the next meeting to provide more factual information. The resolution from Wharton County (*title*), attached, was approved for joint sponsorship with little discussion.

9. Recruitment Schedule

Membership Development: Recruiting and Retaining Members

Without a doubt, membership development — recruitment and retention of active, involved members — is the lifeblood of your county medical society. With strong, committed member base, at both the county medical society and state levels, the Texas Medical Association can continue to represent medicine effectively and develop programs and services that meet member needs. Active, involved members provide:

- Increased revenue for your county medical society;
- A larger, unified voice for local and national legislative and regulatory issues;
- Better networking and support for all physicians; and
- Broader base of volunteers to support county medical society and national efforts on behalf of all physicians and the patients they serve.

Members who join at the state level must also become members in their local county medical society. Dual membership increases the return on both TMA and county medical society membership development efforts.

The following list shows the dues billing process throughout the year. If you have questions or concerns about this process, contact TMA's Membership Development Department at (800) 880-1300, ext. 1433.

October Beginning of Dues Renewal Cycle

- 1 First renewal invoice (e-mail/letter) sent
Action TMA e-newsletter message: "Watch for invoice." (*Action* is e-mailed twice a month to bring you timely news and information that affect physician practices.)

November

- 1 Second renewal invoice (e-mail/letter) sent
First nonmember statement sent inviting nonmembers to join
Nonmember student and resident letters sent

December

- 1 Third renewal invoice (e-mail/letter) sent

January

- 1 Fourth renewal invoice (e-mail/letter) sent
Nonrenewal campaign website launched; CMS should begin calling nonrenewals

February

- 1 Second (and final) statement mailed to nonmember physicians
Action renewal message: "The next *Action* will be the last one you will receive."
15 *Action* message: "Watch for invoice."

March

- 1 Membership **drop date** for nonrenewal/delinquent members

April

- 1 Graduation letter mailed to nonmember students inviting them to join
Resident and graduating student exit surveys sent

June

Student and resident orientations begin and run through the summer.
(TMA and CMS work together to recruit these new members.)

July

- 1 Final retention letter mailed asking nonrenewals to rejoin
Nonrenewal exit survey sent
Half-year dues schedule begins
Eligible for half-year dues are those who have never been a member
and those who were not a member the previous year. Nonrenewals
are **not** eligible. **(See page 55.)**

Newly licensed lists from the Texas Medical Board arrive every other month. TMA sends the list to the CMS executive of record for recruiting purposes. If TMA does not hear back from the CMS within a week, TMA will begin recruiting these physicians directly.

10. Overcoming Common Objections to Membership

Objection: **“I don’t have time to be a member.”**

Answer: Being a member is about more than attending meetings. We know your focus is taking care of your patients, which leaves little time to fight the battles that are facing your profession. That’s why TMA is relentlessly working for you and your patients. Whether it’s representing medicine in Austin and Washington, D.C., meeting with third-party payers to get you paid, developing practice management tools and seminars for you and your office staff, or creating programs to improve public health, TMA has long been a physician’s best advocate. The more members we have, the more we can do on your behalf.

Objection: **“I can’t afford to join. It is too expensive.”**

Answer: TMA offers a wide variety of benefits and services no matter what stage of your career. On average, your county medical society and TMA dues are a great investment at about only \$2-3 per day. That’s less than one tall Starbuck’s coffee. For example, we couldn’t have passed meaningful tort reform without the grassroots efforts and united voice of our physician and medical student members, and the TMA Alliance. Installment options are available that would be helpful to you.

Objection: **“My spouse is a member, and we can’t afford to pay double dues.”**

Answer: When you both are members, you’re guaranteed “double benefits.” Your TMA membership benefits only apply to you and do not extend to your nonmember spouse. And, unless both of you join, you are only giving half your support to your own cause.

Objection: **“I belong to too many associations already.”**

Answer: With more than 45,000 members, TMA is one of the most powerful and effective organizations representing Texas physicians. Although you may receive specific benefits from other associations, TMA is the only one that speaks for the profession of medicine as a whole and has the clout to be heard. TMA membership is the best investment you can make in your profession.

Objection: **“How can I make a difference? I’m just one person.”**

Answer: TMA prides itself on representing the interests of all Texas physicians and their patients. As a member, you have many opportunities to influence TMA’s policies and positions on important issues. As a member of a strong organization like TMA, you have clout with policymakers. As a nonmember, you really are just one lone voice.

Objection: **“I’m just not interested.”**

Answer: What projects could we work on to gain your interest?

Objection: **“I joined once, but dropped.”**

Answer: Why? (This will bring out an objection.)

Objection: **“I want to think it over.” OR “Can you just mail me some information?”**

(This is usually a delaying tactic. However, many people will not buy on the first call.)

Answer: I would be happy to send some information to you; however, let’s review the benefits you will receive from your membership and see if I can answer any questions you might have. We are continually looking for ways to enhance the value of TMA membership. Can you tell me why you have decided not to join TMA? Thank you for your input. I hope that you will consider joining TMA in the future.

Knowledge Center staff are dedicated to answering questions on a wide variety of topics such as HIPAA, medical records, general legal issues, TMA membership, CME, TMA meetings, publications, and so on.

(800) 880-7955

E-mail: knowledge@texmed.org

Objection: **“There isn’t any reason for me to join — I will still receive the benefits TMA works for anyway.”**

Answer: Joining TMA is about strength in numbers and professional pride. TMA and its component county medical societies currently represent more than 45,000 Texas physicians and medical students. The more Texas physicians we represent, the more power we have as a group, and the more we can accomplish for each and every physician and the patients they serve. When you remain a potential member, you are actually joining the side against us. (Point out one or two specific members-only benefits that the person may not know about.)

Objection: **“I don’t agree with a lot of things TMA does.”**

Answer: TMA is a member-driven, democratic association, and no member will agree with the majority on every issue. TMA policy is determined by majority vote only after all sides of the issue have been considered and debated. Every member has a chance to voice an opinion through representative governance structures at every level of the association. As a member, you can take an active role in decisionmaking — vote, hold office, and provide testimony on proposed TMA policy to your peers. If you don’t get involved, you can’t make a difference. Ultimately, it is you who decides how active you want to be and where your interests lie.

