CASE MANAGEMENT SOCIETY OF AMERICA

Items to Consider When Shifting Your Chapter Meeting Virtual

Mission: In the event of a virtual meeting, the Chapter President and Officers are responsible for determining the format of the Chapter meetings. Shifting meetings from in-person or via telephone to a virtual format with video brings new challenges to planning a meeting. Luckily these challenges can all be prepared for in advance. This guide will help you shift your chapter meeting to a virtual platform like Zoom and avoid common problems in that process.

Operations and Considerations: The Chapter President and Officers must make the following considerations, with help from the Executive Office.

- **Dates:** Will the dates remain the same as the original in-person conference, or will the dates shift to accommodate weekends and holidays?
- **Time Zones:** The time zone during which live content will run should be considered in the planning process. This is especially true for events expected to draw large numbers of persons from other chapters, national CMSA or outside the United States.
- **Timing:** Discussion will be needed in advance about the speaking times for any potential speakersand the meeting agenda. The start and end time for the meeting should be clearly communicated to all involved. It is helpful to allot time on the agenda for each discussion item. This helps hold those discussing to an efficient and designed meeting structure.
- **Networking Opportunities:** Even virtual meetings can have networking oppurtunitie! The majority of these fun networking sessions will benefit from having a designated moderator identified in advance; the moderator should make sure that conversation occurs and that questions are answered, particularly when large numbers of persons participate. This is critical for making the networking event a smooth success. For broad topics or session Q&A with several presenters, consider novel networking set-ups such as topical breakout rooms within a single networking session. This method may provide opportunity for small group conversations that model in-person networking. Consider not recording networking sessions to promote open conversations. Examples of networking opportunities include:
  - Gamification, including virtual scavenger hunts designed to promote attendance in live or recorded sessions
  - Raffles or other giveaways
  - Virtual Networking Hours
  - Exhibitor Hours
  - Q&A Sessions with Presenters
- **Building Breaks into the Meeting**: Organizers should take care to build opportunities for attendees to shift between programs or have short breaks. Consider building 5 min periods between topics or meetings to enable transitions between meeting rooms and longer 30- min breaks after a block of 2-3 hours of continuous discussion or content. Networking periods can be added to these breaks to provide opportunity for continuous

engagement that fluctuates between highly and less structured programming. This may help attendees to remain engaged throughout the day. Networking can include scheduled Q&A with recent presenters or novel topics. Take care to schedule breaks in a way that works for persons across time zones (e.g., lunch for east coast and west coast times).

- **Distribution of Live Content Links:** Links for live virtual meetings should generally be individual Zoom (or other) links that are embedded into the agenda and also emailed prior to the day of the meeting. Closed meeting components (such as the business meeting or CMSA Chapter Officer Meeting) should be password-protected and distributed to qualified members. If there is interest in retaining attendees between specific sessions, consider using the same Zoom room for those sessions such that all attendees will immediately role over into the next session. Otherwise links should be independent to prevent conversations that run long from disrupting the subsequent session.
- **Promoting Attendance:** Consider creative strategies to encourage attendance. It may be valuable to provide members opportunities to familiarize themselves with viewing content virtually in advance of the meeting and prior to closure of early bird registration. This may include taping and distributing short "teasers" from high profile speakers or impactful sessions to increase enthusiasm for attending the meeting. Also consider providing a live session available outside of registration (with RSVP) to provide members who are ambivalent about registering an opportunity to sample the virtual meeting content and encourage registration and attendance.

Virtual Meeting Supplements: The CMSA National Executive Office has developed virtual meeting guides to assist attendees and presenters\speakers in accessing the virtual meeting platform.
- Virtual Meeting Presenter Guides
- Virtual Meeting Attendee Guides