

County Alliance Resource Guide

2007-2008



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INTRODUCTION

INTRODUCTION

This Resource Guide is designed to assist you in your county Alliance leadership role. The guide is organized to provide information on membership benefits at the state and national levels, suggested county Alliance officer duties, and an outline of NCMS Alliance and AMA Alliance programs and services. Sections also include information on how to effectively conduct a meeting, manage legislative affairs, submit an article for the state newsletter, and handle communications, as well as tips on parliamentary pointers, promoting membership, and submitting resolutions. Most importantly, please contact NCMS Alliance Headquarters if you need assistance or additional information. We are here to help make your year a great success!

NCMS ALLIANCE MISSION STATEMENT

The North Carolina Medical Society Alliance is a statewide nonprofit charitable organization dedicated to advancing the health of North Carolinians through advocacy and action.

OBJECTIVES OF THE NCMS ALLIANCE

Subject to the limitation set forth in the Articles of Incorporation and Internal Revenue Code Section 501 (c)(3) or any successor section, the objectives of the corporation shall include, but shall not be limited to, the following:

- ⇒ to improve the health and quality of life for the people of North Carolina;
- ⇒ to assist component county alliances with their programs and projects;
- ⇒ to make grants for charitable or educational health-related projects and programs;
- ⇒ to solicit and administer gifts and grants that promote good health and health education;
- ⇒ to collaborate with the North Carolina Medical Society in serving the health care needs of the people of North Carolina.

(Reference: Bylaws approved May 4, 2007)

ADVANTAGES OF ALLIANCE MEMBERSHIP

STATE MEMBERSHIP SUPPORTS:

- Health Promotion and Advocacy programs that reflect the goals and objectives of the NCMS Alliance
- Enhanced presence and voice for physicians and physician spouses to address important legislative issues facing the family of medicine
- Grants to help counties develop and implement health projects in their communities
- Financial support for leadership training as part of the AMA Alliance semi-annual Leadership Conferences
- State Alliance newsletter: *Tarheel Tandem* and e-newsletters provided via email.
- Promotion of state and county membership and events through the State Alliance web site: www.ncmsalliance.org
- Assistance provided to county alliances to develop county web pages on the NCMS Alliance website as well as links to county alliance websites
- Centralized billing, collection of county, state and national dues and monthly membership reports to the county alliances
- Full-time staff at State Alliance Headquarters available with information and assistance

NATIONAL MEMBERSHIP SUPPORTS:

- Leadership Development Conferences that help you to belong, make a difference and enrich your life in the family of medicine and for your community. An educational and networking opportunity for members only.
- Children's Activity Book series that help children learn about healthy lifestyle choices, Internet safety and how to avoid being bullied.
- Stop America's Violence Everywhere (SAVE) resources that help us raise awareness and work against domestic violence and abuse
- Physician-in-Training Host Program that provides temporary housing for interviewing residents
- Legislative Advocacy Network to raise the voices of thousands of us in the medical family on the issues that affect medical practice.
- Discounted Term Life Insurance, a uniquely Alliance value in family insurance protection.
- Screen Out and Faux Paw Health Promotion Resources to help you protect the health and safety of America's children and all the children you love.
- www.AMAAlliance.org., AMAAlliance TODAY, AMA Alliance E-Connection, and AMA Alliance Advocacy Connection,

WHAT IS FEDERATED MEMBERSHIP AND WHY SUPPORT IT?

Federated membership refers to the supporting the total structure of our nation-wide organization. The Alliance has three components - your county Alliance, the NCMS Alliance, and the AMA Alliance. This structure creates links among these components that unify Alliances in their health promotion, legislative advocacy, AMA Foundation fund-raising, and membership efforts. Being a federated member allows your membership to have the greatest impact.

COUNTY ALLIANCE OFFICER GUIDELINES

PRESIDENT

- Prepare for meetings. See “How to Conduct A Meeting” and “Parliamentary Pointers” under “How to...” and Tips.
- Plan the year's work with your county officers and board members.
- Outline goals and objectives and ensure that action plans are in place to carry out the goals and objectives.
- Mentor the president-elect and other officers.
- Delegate tasks as appropriate.
- Plan to hold regular board meetings. This is the best way to ensure that alliance work is progressing according to plans.
- Prepare a calendar of all meetings and important deadlines.
- Communicate changes in alliance leadership (officers, committee chairs) and membership (addresses, phone numbers, deaths) promptly to NCMS Alliance Headquarters.
- Complete an annual report for the NCMS Alliance by March 30. Annual report forms will be mailed from the state office directly to county presidents
- Plan to have the NCMS Alliance president or other state representative attend at least one local alliance meeting for installations, general meetings, etc. .

PRESIDENT-ELECT

- Use the year as a period of self-education regarding local, State, and National Alliance matters.
- Carry out assigned tasks. Duties vary from Alliance to Alliance. The president-elect may be responsible for membership or may be in charge of program planning. In any case, the president-elect should be assigned definite tasks and should work closely with the president.
- Select committee chairs early. Make sure they understand the specific duties of the position before they agree to accept. Consult with the president in making selections. While new talent is needed, it is important not to sacrifice continuity in committee leadership.
- Develop plans for the upcoming year in preparation for the presidency. Be familiar with the past history and projects of the alliance in order to plan for the future.
- Encourage involvement with the local medical society.
- Be aware of community projects in order to promote collaboration and prevent duplication of efforts already being addressed.

COUNTY ALLIANCE OFFICER GUIDELINES

SECRETARY

- Keep accurate records of business meetings and help with general correspondence.
- Attend all business meetings of the organization or secure a substitute.
- Remember that minutes are the legal record of the organization.
- Record what was done... **not what was said**. Minutes should not be verbatim records of discussion.
- Ensure that minutes are kept in a safe place and passed on from year to year.
- The contents of the minutes should include:
 - ⇒ Kind of meeting - regular, special, adjourned.
 - ⇒ Name of organization.
 - ⇒ Date, time, and place of meeting.
 - ⇒ Names of, or substitutes for, regular presiding officer and secretary.
 - ⇒ Action taken on minutes of previous meeting - approved, corrected.
 - ⇒ Balances reported by treasurer.
- A separate paragraph for each subject, showing:
 - ⇒ Exact wording of any main motion that has been seconded.
 - ⇒ Name of the maker of the motion (not of the seconded motion unless required by rule).
 - ⇒ Disposition of the motion - whether adopted, not adopted, or how disposed of temporarily.
 - ⇒ Signature of secretary and signature of president if required by the organization.

****The previous meeting's minutes may be accepted as submitted unless errors are noted. A motion is not required to accept the previous meeting's minutes.***

TREASURER

- Be responsible for maintaining accurate records of the financial status of the organization. Records should include receipts for membership dues, revenue from fundraising events, other revenue and sources, and expenses of the organization. All sources of funding should be recorded and all bank deposits documented. Expenses reimbursed to individuals should be documented by receipts for expenditures. Bills paid to outside businesses should be documented with original invoices.
- Balance checking and savings accounts monthly.
- Work with the president to ensure the organization remains financially sound.
- Prepare a budget in concert with appropriate officers and chairs.
- Oversee receipts and expenditures and report periodically to the Board, including comparisons of actual versus budgeted items.
- Authorize the NCMS Alliance to handle dues collection (see NCMS Alliance Programs and Services – Dues Collection) or ensure that local membership dues collection is thorough and accurate. Although the method of collecting dues varies with different alliances, thoroughness in contacting each member and detailed, accurate records are two necessary elements for this process.
- Prepare financial reports. These reports may cover such items as general finances, a specific program or project, or membership dues submissions. An annual report outlining year-end balances on assets and liabilities, as well as a budget and expense comparison report, should be presented to the membership at the annual meeting.
- Arrange for an audit. Financial records should be audited and bookkeeping procedures reviewed at the close of each fiscal (budget) year. The audit should be done by a certified public accountant. The auditor's report should be presented and adopted at the first board meeting following the audit.

NCMS ALLIANCE PROGRAMS AND SERVICES

AFFILIATE STATUS AVAILABLE TO COUNTY ALLIANCES

County alliances are eligible to become affiliates under the umbrella of the NCMS Alliance as a tax-exempt 501 (c)(3) nonprofit organization. The NCMS Alliance arranges for tax return preparation for participating county alliances. Contact NCMS Alliance Headquarters for additional information.

AMA FOUNDATION

The American Medical Association Foundation (AMA Foundation), a nonprofit organization, was established to help ensure quality medical education and to assist research in the nation's medical schools. The AMA Foundation distributes thousands of dollars each year to the medical schools in the nation. It has grown to become the major philanthropy of organized medicine.

The AMA Foundation Funds

The AMA Foundation currently has three different funds. Donors may designate their tax-deductible contribution to the fund of their choice. The funds are:

- **Scholars Fund** – Monies are distributed each spring to medical school deans to be disseminated to deserving students as scholarships and grants. Donations to this fund may be designated to a medical school of the donor's choice.
- **Fund for Better Health** – Monies are used for programs that will benefit the health of the public, such as SAVE or anti-tobacco programs. Alliances and other organizations whose programs benefit the health of the public can submit proposals to receive funding. (See AMA Alliance Programs and Services – Grants.)
- **Development Fund** – Funds provide unrestricted support to enable the Foundation to continue its mission of service to the medical community and to improving the health of the nation.

The Alliance's Role

To date, over 93% of the funds contributed to the Foundation have been raised through alliance efforts.

Fundraising

- The AMA Foundation "Fundraising Handbook for Alliance Leaders" is an excellent resource for fundraising ideas. It is available to county leaders. Visit www.ncmsalliance.org for a link to this and other AMA Alliance resource guides.
- Holiday Sharing Cards generate over half of all alliance contributions to the Foundation each year. Donors are asked to make a contribution to the AMA Foundation in exchange for being listed on the Sharing Card. Cards are then sent to physicians and their spouses, thus sparing donors the work and expense of sending individual cards to their medical friends.
- Memorial contributions should be encouraged instead of flowers for deceased alliance members, their spouses, and their relatives.

How to Handle Contributions

- **Contributions to the AMA Foundation should be made payable to the AMA Foundation and forwarded with a completed contribution form (available from NCMS Alliance Headquarters) to the state AMA Foundation chair who is responsible for remitting the donations promptly to the AMA Alliance.**
- For each contribution, indicate the name of fund and also the name of medical school if the gift is for the Scholars Fund.

NC AMA Foundation Chair:

Racheal Kunesh
5908 Kintyre Court
Concord, NC 28027
Tel: 704-795-7367

NCMS ALLIANCE PROGRAMS AND SERVICES

COMMUNICATIONS AND PUBLIC RELATIONS

The NCMS Alliance is available to assist you and your alliance with communications and public relations issues and questions. Also, see “How to...” and Tips for a discussion of this subject and your alliance.

DOCTORS' DAY

Doctors' Day is March 30 and is observed each year by medical communities throughout the United States. It is a project of the Southern Medical Association Alliance, founded to honor Dr. Crawford Long of Georgia, who was the first to use ether as an anesthetic on March 30, 1842.

County alliances participate in the observance of Doctors' Day in many ways and with different projects. Contact your NCMS Alliance Doctors' Day Chair for ideas and assistance. For more information visit www.sma.org and click on SMA Alliance.

DUES COLLECTION

The NCMS Alliance offers dues collection services for each county alliance. Dues are prepared and mailed from NCMS Alliance Headquarters in the spring according to county instructions. For those counties on a calendar year basis, Headquarters will prepare and mail dues notices in January.

There is no charge to county alliances for this service, and the NCMS Alliance pays for printing, envelopes, preparation, and postage. Dues are remitted to county alliances by the fifth working day of the month following their collection.

Prior to the billing period, county treasurers are sent a dues billing option form to select the process they wish to use in billing. County Alliances are encouraged to participate in this option through the NCMS Alliance.

FUNDS (RESTRICTED AND UNRESTRICTED)

The NCMS Alliance provides a central charitable organization to administer funds for health education projects, both statewide and in local communities. The North Carolina Medical Society Alliance Health Education Foundation, Inc. was organized in May 1985 as a tax exempt 501(c)(3) nonprofit organization to which donors can make tax-deductible contributions. In May 1998, the NCMS Alliance and the Health Education Foundation merged, retaining the 501(c)(3) status and the name “North Carolina Medical Society Alliance.” County alliances are eligible to become affiliates under the umbrella of the NCMS Alliance as a tax-exempt 501(c)(3) nonprofit organization. Contact NCMS Alliance Headquarters for additional information.

Unrestricted Funds

Health Education Opportunity Fund - Funds are not restricted to specific projects or programs and are used to support programs of the NCMS Alliance statewide.

Restricted Funds

Education Endowment Fund - Funds are used to support health education programs and projects in North Carolina. County alliances are encouraged to apply for grants from this fund. A grant application is included in the Forms section.

Anne Holmes Hubbard Memorial Lecture Fund - This fund was founded by a grant from the Hubbard Family to honor the late Anne Holmes Hubbard. The fund provides a speaker, known as the Anne Holmes Hubbard Memorial Lecturer, for the Past Presidents' Luncheon at the Annual Meeting of the NCMS Alliance.

NCMS ALLIANCE PROGRAMS AND SERVICES

GRANTS

The NCMS Alliance awards grants for projects which promote the development of and participation in programs and projects that address health and health education issues in North Carolina. Priority will be given to programs and projects that 1) are sponsored by member county alliances, and 2) are in compliance with the current goals and health initiatives of the State Alliance. County alliances are encouraged to apply for these grants. A grant application and guidelines are included in the Forms section and are available online at www.ncmsalliance.org.

Also, the AMA Foundation awards grants from its Fund for Better Health. See AMA Alliance Programs and Services – Grants. For smaller grants for grassroots health projects, the AMA Alliance offers Health Promotion Policy Grants. Visit the AMA Alliance website (www.amaalliance.org) under Health Promotion.

HEALTH PROMOTION

Each year the NCMS Alliance undertakes health programs and projects that address current health concerns.

County alliances are encouraged to conduct health projects in their communities. Alliances are encouraged to form coalitions with other groups to effectively use manpower, increase positive results, and generate more community involvement for the project.

Contact the NCMS Alliance Vice-President for Health Promotion for information and ideas.

LEGISLATIVE AFFAIRS

The NCMS Alliance is available to assist you and your alliance with issues or questions related to legislative affairs. See “How to...” and Tips for a discussion of legislative affairs and your alliance.

MEDICAL HERITAGE

Medical Heritage is a project of the Southern Medical Association Alliance that encourages members to become more aware of our medical heritage by promoting programs and projects to preserve medical history and to recognize significant contributions in the field of medicine.

County alliances can write a pamphlet or book about the alliance’s history, send an article to *Tarheel Tandem* (including photographs), make a video, or conduct an audio interview. County alliances can use this program to preserve local history.

MEMBERSHIP

The NCMS Alliance is available to assist you and your alliance with any issues or concerns related to membership. See “How to...” and Tips for a discussion of this subject.

NCMS ALLIANCE PROGRAMS AND SERVICES

GET FIT NC COUNTY ALLIANCE CHALLENGE

The Get Fit NC County Challenge involves teams of state Alliance members competing to log the most exercise miles during a six month period. The challenge gets underway **October 1** and ends **March 30**. Teams are organized by county and can include an unlimited number of members. County teams report the total of their ten members who logged the most miles each month. Totals can be mailed or e-mailed to the NCMS Alliance office. The winning team receives a \$500 Health Promotion Grant for their county Alliance.

For more information visit, www.ncmsalliance.org to get details, tally sheets and exercise conversion charts.

GET FIT NC 5K

The Get Fit NC 5K is part of the NCMS Alliance's commitment to promote physical activity and good nutrition with an emphasis on kids. The Get Fit NC 5K is dedicated to increasing awareness of the nutritional and physical needs of children. The race also raises money to purchase equipment for physical education programs in NC public schools. The proceeds from the 2006 race assisted more than a dozen schools and put resources in the hands of teachers to encourage thousands of children to get fit. Please visit www.ncmsalliance.org for a summary of requests funded through Get Fit NC.



MEMBERSHIP

The NCMS Alliance Vice President for Membership Development is available to assist you and your alliance with any issues or concerns related to membership. See "How to..." and Tips for a discussion of this subject.

Classification of State Alliance Members:

- Regular Member: the spouse, widow, widower, or divorced spouse (provided the person was a member in good standing of the State Alliance at the time of the divorce and has not remarried outside the profession) of a physician who is or was eligible to be a member of the NCMS
- The spouse, widow, widower, or divorced spouse (provided the person was a member in good standing of a state alliance at the time of the divorce and has not remarried outside the profession) of a physician eligible to be a member of any other state's medical association or the American Medical Association at the time of retirement or death.
- Physician or Physician-in-Training who is eligible to be a member of the NCMS.
- Resident Physician Spouse: the spouse of a resident or fellow in an approved training program
- Medical Student Spouse: spouse of a student enrolled in a medical school approved by the AMA.
- 30-Year and 50-Year Members: members who have paid State Alliance dues for 30 or 50 years (not necessarily consecutive years). New 30 and 50-year members are recognized and presented a certificate at the Annual Meeting.
- Life Member: a regular member who paid dues for 30 consecutive years prior to June 30, 1973.
- Honorary Member: a member or non-member elected to honorary membership by a majority vote of the House of Delegates, provided his or her name has been approved by the Board of Directors prior to the Annual Meeting. The person must have rendered long and distinguished service in the work of the State Alliance.

NCMS ALLIANCE PROGRAMS AND SERVICES

MEMBERSHIP DIRECTORY

An alliance membership directory can be a major communication tool and source of information for your alliance. It can be informative yet inexpensive and is one of the best ways to keep your members in touch with each other. Many county alliances use their directory as a membership marketing tool. Only current members receive a copy!

Suggested items to include in your county alliance directory are:

- Complete list of members and their spouses, including first names, address, email address, telephone number and medical specialty (ER, OBG, etc.)
- Designation of new members, widowed members, retired members
- Designation of hospital house staff and resident physician spouses
- County Alliance Board of Directors and Committees
- State Alliance Officers, Executive Director, Regional Director, and contact information
- County and State Medical Society officers and contact information
- County and State Alliance calendar of events (so your members may plan to participate)
- Programs and projects for the year (title, speaker, location and time)
- Legislators and their contact information (state and national)
- Goals and objectives
- Memorials
- Past presidents (including first names) with year of office
- Historical highlights
- 30-year and 50-year members, Honorary Members
- Constitution, bylaws, and budget

The NCMS Alliance can provide you with an electronic or a hard copy list of your current members, state officers, county presidents and contacts, 30- and 50-year members from your county, and a state calendar. Remember to send a copy of your membership directory to NCMS Alliance Headquarters and the state president as soon as it is printed.

MEMORIALS

The NCMS Alliance recognizes the importance of acknowledging the death of any NCMS Alliance member. County alliance officers are asked to notify NCMS Alliance Headquarters upon the death of an alliance member. The NCMS Alliance Secretary will write a sympathy letter to the family. The Secretary will conduct a memorial service at the Annual Meeting to recognize the contributions of deceased members.

NCMS ALLIANCE PROGRAMS AND SERVICES

BOARD DEVELOPMENT COMMITTEE

The Board Development Committee selects the slate of state officers to be presented for election to the House of Delegates each year. The Board Development Committee is composed of at least five members, including two members from each region who are named by the Regional Directors with input from District Chairs. The Board Development Committee is elected by the House of Delegates.

Before asking anyone to serve, the Board Development Committee reaches a consensus and then obtains the consent of nominees. Nominees' names are submitted to the Board of Directors and published in an official NCMS Alliance communication prior to the Annual Meeting. The slate of officers is voted on at the Annual Meeting. Nominations are also permitted from the floor provided that there is prior consent from the nominees.

Alliance members have a responsibility to suggest qualified individuals for consideration to serve as a state officer or committee chair. Recommendations should be submitted in writing to the Nominating Committee chair or NCMS Alliance Headquarters. There is no more important job than nominating, because the future of the organization depends on good leadership.

RESOLUTIONS

County alliances may propose resolutions to the House of Delegates. See "How to..." and Tips for information on submitting resolutions.

SOUTHERN MEDICAL ASSOCIATION ALLIANCE (SMA Alliance)

The Southern Medical Association Alliance is composed of spouses of physicians who are members of SMA and widows or widowers of deceased members who were in good standing at the time of death. There are no additional membership dues. Its objectives are to honor physicians on Doctors' Day, to research and preserve the history of medicine, and to promote fellowship. To help achieve these objectives, the positions of councilor and vice councilor from each member state were established. Councilors and Vice Councilors serve as liaisons between the state and the SMA Alliance. See the Doctors' Day and Medical Heritage sections for project ideas.

NCMS ALLIANCE PROGRAMS AND SERVICES

STATE ALLIANCE NEWSLETTER: *TARHEEL TANDEM*

Tarheel Tandem, the official state newsletter, is produced at least three times a year and transmitted to every NCMS Alliance member. Its mission is to keep the membership informed of NCMS Alliance plans, projects, and programs and to provide broad-based coverage of county alliance activities.

The *Tarheel Tandem* Editorial Board depends on county alliances to submit county news. Each county is asked to appoint a member to submit written articles about county activities. Photographs are encouraged and add life to the articles. Local newspaper clippings are especially helpful when included with written articles. County newsletters also provide a great resource for county activities. Please place the *Tarheel Tandem* editor, NCMS Alliance Headquarters, NCMS Alliance President, NCMS Alliance President-elect, and your regional director on your county newsletter mailing list. See "How to..." and Tips for more information on submitting an article.

Please e-mail your county articles and pictures to the *Tarheel Tandem* Editorial Board at the following e-mail address:

editor@ncmsalliance.org

If you have questions regarding submissions to the state newsletter, contact our state office at 919-833-3636.

STATE ALLIANCE WORKSHOPS

The NCMS Alliance Board of Directors and staff are available to work with County Alliances in presenting workshops and trainings focused on a number of areas including technology, communications, fundraising, legislation and membership. Please contact the NCMS Alliance state office if interested in scheduling a presentation for your county.

AMA ALLIANCE PROGRAMS AND SERVICES

AMA ALLIANCE COMMUNICATIONS

AMA Alliance publications are designed to address a wide range of needs: personal support, health and programming information to offer your communities, and leadership handbooks and resources. Below is a partial list of publications available. Refer to the Forms section for order forms or order online at www.ama-assn.org/go/alliance.

- AMA Alliance Today: Magazine for AMA Alliance members featuring issues of concern to medical families, health topics, legislative updates, AMA initiatives, and member achievements.
- Newsline: Newsletter for county and state alliance leaders.
- AMA Alliance Weekend Newsline: A weekly emailed newsletter. Contact the AMA Alliance to subscribe.

AWARDS

The AMA Alliance sponsors Health Awareness Promotion (HAP) and Legislative Education and Awareness Promotion (LEAP) Awards to recognize county and state alliances for outstanding projects. A sample entry form is included in the Forms section. Entry forms are available on line at www.amaalliance.org.

LEADERSHIP DEVELOPMENT CONFERENCE

The AMA Alliance sponsors an intensive leadership training program entitled Leadership Development Conference twice each year. Two training tracks are geared to county leaders and state leaders, and participants can choose from different workshops over the three-day period. Partial reimbursement is available from the NCMS Alliance and the AMA Alliance. Participants must be members of the state and national alliances to attend. Some counties may also provide a stipend for attendance to certain qualified officers. Check with your county's bylaws or policies.

GRANTS

Grants are available from the AMA Foundation Fund for Better Health to fund programs that will benefit the health of the public, such as SAVE or anti-tobacco programs. Alliances and other organizations whose programs benefit the health of the public can submit proposals to receive funding. Funding recipients are selected by the AMA Foundation Board. For guidelines and application forms, contact Harry Bauer at Harry.Bauer@ama-assn.org or visit www.amaalliance.org

MEMBER SERVICES

The AMA Alliance offers a full range of personal and professional services to its members that reflect the needs of physicians' spouses. Members have access to a variety of benefits designed to offer the latest health and legislative information, enhance leadership skills, and save time and money, including:

- Leadership training
- Planning ideas and handbooks
- SAVE, fundraising, and health information
- Legislative advocacy
- Insurance plans and investments Magazine
- Magazine
- VISA credit card
- Car rental and hotel discounts

AMA ALLIANCE PROGRAMS AND SERVICES

PROJECT BANK

The AMA ALLIANCE *Project Bank* catalog is a valuable tool for county alliances that want to implement new projects. *Project Bank* describes more than 500 different alliance programs for health events, legislative forums, adolescent health, SAVE, and many others.

Please share your county projects with the AMA ALLIANCE so they can be included in the catalog. *Project Bank* Entry and Withdrawal Forms are included in the *Project Bank* catalog. Browse through the Project Bank online by visiting www.amaalliance.org.

CONTACT INFORMATION

***AMA Alliance
515 N. State Street
Chicago, IL 60610***

***Phone 312-464-4470
Fax 312-464-5020***

***E-Mail
AMAA@ama-assn.org***

***Web site
www.amaalliance.org***

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HOW TO CONDUCT A MEETING

As president of your alliance, one of the most visible of your leadership roles is to conduct alliance business meetings. Conducting meetings successfully is an easy-to-learn skill. Just follow a few simple guidelines, and your meetings will be meetings you and others actually enjoy attending!

- First, sit down and think about things that you don't like when you attend meetings. Some of those may be:
 - 1) feeling a lack of "reason for being there,"
 - 2) a rambling session without focus,
 - 3) participants talking too much,
 - 4) participants getting the meeting "off track,"
 - 5) meetings that last too long, or
 - 6) meetings where you felt that your views were just not heard.
- There may be other things you can name. Write them down.
- Second, carefully plan your meeting.
- Write down exactly what your objective is for having the meeting (and there may be several objectives). Think carefully about what you want the outcome of your meeting to be. This is not to say that your objective will be that you want the group to decide to do "x;" it means that you want the group to come to a decision about what activity to pursue. Remember you are the leader, not the dictator. Another critical note here is that if you cannot clearly define at least one important objective for having the meeting, don't have it.
- Prepare a written agenda stating the objectives of the meeting before you outline the order of business. Then outline the order of business to make sure you are structuring the meeting in such a way as to meet your objectives. This is where your organizational skills come into play as you plan the meeting to move through the business smoothly and attain the meeting objectives. Assign individual responsibilities for agenda items. Carefully allocate times to each agenda item.
- It is important to make sure that everyone attending the meeting knows what the objectives are. Any individuals who have responsibility for an agenda item need to be notified in advance. It is preferable for the agenda to be sent out to participants well in advance of the meeting. In the case of a general business meeting, this can be done through your regular newsletter.
- Look back on your list of things that you don't like when you attend meetings. Have you planned to minimize or eliminate those things in your meeting?
- Now it is time to conduct your meeting. Your preparation will serve you well. Remember that you are the "moderator" with the role of keeping the meeting on track, controlling the discussion, and ensuring that the meeting objectives are met.
- To ensure that everyone is on track at the beginning of the meeting, review the agenda and the meeting objectives.
- Proceed with the business as outlined in the agenda. Use the agenda as your biggest ally. You can keep participants from getting off track by referring back to the agenda. You can keep participants from talking too much on a subject by referring back to the agenda and time allocations. Be sure that everyone who wants to speak on a subject has that opportunity, but control discussion and time.
- Be sure that motions are recorded and voted on when decisions need to be made. Then move on.
- At the end of the meeting, review the objectives and briefly summarize how they were met.
- Celebrate success! Thank everyone for being a part of a successful meeting!
- Get minutes from the secretary promptly after the meeting and review them to be sure they accurately record the decisions made in the meeting.

A sample agenda is provided on the following page.

SAMPLE AGENDA

Sample Agenda

YOUR COUNTY ALLIANCE
BOARD OF DIRECTORS MEETING
HOSPITAL CONFERENCE ROOM
WEDNESDAY, SEPTEMBER 18, 2007

<u><i>Agenda Item:</i></u>	<u><i>Responsibility of:</i></u>	<u><i>Time:</i></u>
Call to order	Micky Meyer	10:00
Determination of quorum	Micky Meyer	10:02
Minutes of the August 15, 2005, meeting	Micky Meyer	10:05
Treasurer's report	Donald Aniston	10:10
President	Mickey Meyer	10:15
President-elect	Amber Ellis	10:20
Immediate Past President	Ronald Wallace	10:25
Nominating Committee		
Planning and Development		
Standing Committees		
AMA Foundation	Sunny Smith	10:35
Legislation	Renee Rizzo	10:40
Membership	Susan Griffin	10:45
Health Promotion	David Mulder	10:50
Unfinished Business	Mickey Meyer	10:55
New Business	Mickey Meyer	11:05
Announcements		
Next meeting – October 18, 2007, in Asheville		
Dual Doctors Dinner – November 15, 2007, at 7:00 p.m.		
Adjournment		11:15

Suggestions: Send the agenda out a week in advance of the meeting. Make a copy for yourself that is triple-spaced and write notes to yourself, e.g., "need motion to approve minutes." **Start and finish on time!** That may be the hardest task you face, but your board members will appreciate it – and be willing and eager to attend the next meeting.

HOW TO MANAGE COMMUNICATIONS

Communication within the Alliance

- Appoint a chairperson and committee to work continuously with public relations, publications, and publicity. This committee should be informed about what is occurring with every committee and its programming. Publicity and public relations strategies should be developed prior to the implementation of any program.
- Good public relations begin in your own alliance, so publish a regular newsletter or start one if it doesn't already exist. Use it to inform members about special projects, meetings, speakers, and committee activity and to encourage their participation. In large alliances a separate committee may handle the newsletter, but in smaller ones the president or communications chair can do it.
- Consider appointing a communications chair or a non-member communications resource person whose role would include being informed and involved in all alliance activities and advising the board about communicating more effectively.
- Publish a membership directory with information about plans, activities, leadership, how to contact members, and other important communication pieces.
- At every meeting encourage members to talk about the Alliance and tell the community about Alliance activities. Ask them to make it a daily routine to discuss the Alliance with everyone with whom they come in contact. Ask the question, "Have you heard about the Alliance and the kinds of things they are doing?" Be prepared to give accurate information or referrals.
- Consider communicating through email "news flash" or "updates."
- Investigate the possibility of developing a web site. NCMS Alliance Headquarters can help. Contact ncmsalliance@ncmedsoc.org for more information.

Communication with the Medical Society

- Ask if your alliance can be represented at local medical society board or committee meetings to promote good rapport between the two organizations. This is essential. You will want to convince the society that its support, combined with alliance cooperation and enthusiasm, can increase the effectiveness of both organizations.
- Ask if the alliance may place items in the medical society newsletter.
- Consider feature stories or highlights in the alliance newsletter about physician accomplishments or involvement in the community.
- Get a copy of the society's calendar of events and meetings. Insure that society and alliance calendars do not conflict and that special meetings are included on both.
- Have a joint meeting. Offer to write an announcement or publicize the event in the alliance newsletter and local newspaper. This can begin a relationship with the Society's newsletter editor.
- If you have a web site, ask the society if you could have a link to their site or post information about the alliance on their site.

HOW TO MANAGE COMMUNICATIONS

Communication in the Community

- Establish a link between your alliance and other community organizations in the promotion of mutual health concerns by appointing liaisons to the organizations.
- Identify representatives from your alliance who are knowledgeable about the organization and are willing to be speakers on behalf of the alliance. Schedule the speakers to meet with a difference community organization several times a year.
- Become familiar with health resources in your community, learn needs, and determine where new services may be needed. Communicate this information to the alliance and other organizations.
- Share resources by offering Alliance information and news about projects to other organizations. Keep a positive rapport with other agencies, whether actively working together on a program or not. Remember that a goal of the Alliance is the promotion of health interests. The more volunteer assistance received from other organizations, the closer the Alliance is to reaching its goals.
- Work with communications chairs from other organizations when involved in coalition projects and let them help publicize Alliance-sponsored projects. Invite community leaders to alliance events and make an effort to educate them about alliance activities.
- Once you have established a relationship with various organizations, try to establish a presence on their web site or have a link from their site to yours.
- Develop a rapport with your local hospital(s). Make sure key persons are aware of what your alliance is doing and try to develop community programs together.
- Ask if it is possible to post announcements on their web site or link to yours.
- Get information to residents and their spouses. Involve them in meetings and events.

Communication with State and National Alliance

When your alliance has a project or program that would be of interest to other alliances, write an article and send it to the *Tarheel Tandem*, *AMA Alliance Today*, or the *AMA Alliance Weekend Newslines*. Send photographs to accompany the article. Be sure the state president, president-elect, executive director, *Tarheel Tandem* Editor, and AMA Alliance are on your newsletter mailing list. The best way to send these articles is via email. The national and state alliances have publications and resources to help you.

HOW TO MANAGE COMMUNICATIONS

Communication with the Media

- Remember that public relations are a way to get people to know you. It is “the last free thing in America.” Public relations campaigns are a complete program of conscious and organized efforts to reach and influence the thoughts and actions of individuals and groups in order to accomplish an objective.
- Remember that publicity is one of the most important tools of public relations and is utilized in the three spheres of personal contact, publicity releases, and advertising.
- Have someone serve as liaison between your alliance and the media. Learn to use good judgment about what news is and what makes the news, although the size of your alliance and hometown often determines what kinds of events is considered news.
- Recognize that good media relations are based on long-established mutual understanding arrived at through personal contacts. Become acquainted with local members of the press, radio, and television. Pass on lists of contacts from year to year, call on former PR chairs, and call on other members who have good contacts to help.
- Learn to recognize and use publicity for only those items that interest others: new projects, outstanding speakers, benefits, awards won or given, and member participation in local or national affairs.
- Invite the media to monthly meetings so that they can get to know the programming that you are doing. Don't wait until you need coverage. Share with them your community involvement and dedication on behalf of physicians and their families.
- Dealing with media: Know the audience, capabilities, deadlines, restrictions, and policies of each medium. Be honest; be accurate; be concise and professional; and be appreciative.
- Working with newspapers and magazines: Know the five "Ws" (who, what, when, where and why) before contacting the newspaper or writing a news release. Be accurate and brief, whether talking on the phone or in writing. Always give names and phone numbers of people who can answer questions or add to the story. Submit material at least one week in advance of desired publication date for newspapers and several weeks or months ahead for magazines. Recently, with computerization of the press, newspapers appreciate having events programmed into calendars a month or more ahead. Above all, learn what your newspaper wants, and try to accommodate the requests as closely as possible each time. Don't forget to suggest photos and assist in making arrangements.
- Working with radio and television: The best contact is the program director or news director, but often the station will have a public relations director who can help. Call ahead for an appointment and tell the receptionist what you need. Let her suggest the person with whom you should talk. The contact will make the decisions as to what goes on the air but will welcome suggestions. Ask for public service announcements (PSAs), news coverage of an event, and an interview on a "talk show," or special feature program if the project is of timely content and of broad general interest. When thinking of who should appear, use members of your alliance who are confident with interviews and who are also educated as to the material to cover.

HOW TO MANAGE LEGISLATIVE AFFAIRS

Legislation critically impacts our spouses, our families, our state, and our nation. The Alliance is a powerful voice in effectively promoting medical community efforts to see that good health legislation is introduced and passed and that undesirable bills are either modified or defeated. Effective legislative activity begins at the county – grassroots – level.

County alliances are encouraged to appoint a legislative chair. County chairs have an important responsibility to be well informed and alert to legislative issues concerning the medical and healthcare fields. Your chair should understand the goals for legislative action, establish one-on-one communication with county alliance members, and provide legislative updates at membership meetings. Some tips for an effective legislative affairs program are:

- Encourage individual members to build a relationship with their legislators and work in the campaign of a candidate they support. It is much easier to approach an elected official if you have had some personal contact with that person before the election. These contacts can have positive impact on the outcome of bills of importance to the medical profession.
- Conduct voter registration drives in your alliance and medical society.
- Prominently place the names and addresses of your state senators and representatives and also your U.S. senators and congressmen in your county directory. This will help county legislative chairs when they ask members to write their legislators concerning medical issues. The State Alliance maintains an excellent website with legislative links to help members easily identify local, state, and national legislative representatives, contact information, current issues, and other important resources.
- Promote “Doctor of the Day” and encourage participation in this program that provides a volunteer physician for the state legislature every day they are in session.
- Support the goals of the Legislative Affairs Committee:
- To help alliance members remain well informed on legislative issues concerning organized medicine.
- To provide materials to members about legislative proceedings in the state and on the national level.
- To implement programs that increases the interest, knowledge, and participation of members in legislative areas.

MEDPAC

MEDPAC is a voluntary, nonprofit, un-incorporated committee organized to direct financial support to state and federal political candidates in North Carolina. MEDPAC membership consists of individual physicians and physician spouses who are dedicated to preserving quality healthcare in North Carolina and throughout the United States. The committee is comprised of two branches: MEDPAC-State and MEDPAC-Federal, which together constitute the political action arm of the North Carolina Medical Society. MEDPAC activities are funded by voluntary contributions from its members.

Congressional and legislative candidates' positions on medical and healthcare issues are carefully scrutinized by the MEDPAC Board of Directors before contributions are made. These efforts to elect candidates who share our interest in quality medical care provide a stronger voice for medicine's concern than individual contributions.

Membership in MEDPAC is invaluable. It is critical that the medical family financially support candidates for Congress and the General Assembly who truly understand the relevant issues affecting healthcare today. *MEDPAC*

Mail your contribution of \$100 or more to:
MEDPAC
PO Box 25834
Raleigh, NC 27611

**For additional information, contact the NCMS Government Affairs Department
(800) 722-1350 or (919) 833-3836.**

HOW TO MANAGE LEGISLATIVE AFFAIRS

Key Contact Program

The North Carolina Medical Society encourages physicians and their spouses to participate in their Key Contact Program. Key Contact participants form a network representing the medical family who are reliable contacts to their legislators on important issues being debated in the General Assembly. By agreeing to become a Key Contact, we become partners in the political process.

The NCMS Government Affairs Department will provide background information and pertinent talking points. All that is needed from you and your alliance members is the willingness to make a difference. You do the talking your way on the issues with which you feel most comfortable. To become involved in the Key Contact Program, contact the NCMS Government Affairs Department at (800) 722-1350 or (919) 833-3836.

Resources Available

Legislative Update - Published by the NC Medical Society. Covers legislation at the state level on a regular basis when the General Assembly is in session. County legislative chairs should subscribe in their own names to this publication by sending an email to the NC Medical Society, jlewis@ncmedsoc.org. (Angie, check to see this is still a valid email address – also include the name of the contact person). You may contact the State Alliance Vice-President for Legislative Affairs for more information.

Bulletin – published twice a month by the NCMS and available online to NCMS members. Subscription information is available from the NCMS Society, email: medwards@ncmedsoc.org. (same here)

American Medical News – weekly publication for American Medical Association members.

Web sites:

- www.ncmsalliance.org
- www.ncmedsoc.org
- www.ama-assn.org
- www.amaalliance.org
- www.nc.gov
- www.ncleg.net
- www.senate.gov
- www.house.gov

HOW TO WRITE AN ARTICLE FOR TARHEEL TANDEM

Submitting Articles

What form should the article be in?

Write in the third person - newspaper style.

Make it fun...include comments from participants.

Type or use word-processing.

Do not use all caps, bold, italics, or underline formatting features.

How long should the article be?

350 words is an optimum length.

Can I include a picture?

Yes, absolutely, please do!

A clear close-up picture is the best.

Group shots are good, but candid shots are better!

Never write on the back of a photo. Write caption or names of persons in the photo on a self-stick label and then put it on the back of the photo. Photos will be returned upon your request.

You can also email pictures in a jpeg format

Can I e-mail articles?

Yes, email is preferred. E-mail pictures and articles to editor@ncmsalliance.org

Send the article as an e-mail message or as an attachment saved in MS Word or Rich Text Format.

Can I send articles on a disk?

Yes.

Disk format should be Windows compatible with articles saved in MS Word or Rich Text Format.

Where do I send my article?

Send articles and photographs to NCMS Alliance Headquarters.

Deadlines

Articles will be accepted at any time and held for the closest deadline. *Tarheel Tandem* is scheduled to be published quarterly. See the calendar section for deadlines.

PARLIAMENTARY POINTERS

The chair (usually the president) is responsible for conducting business meetings in accordance with parliamentary procedures. Usually, the latest version of Robert's Rules of Order is used as the parliamentary authority. The chair should:

- Call the meeting to order.
- Determine that a quorum (a certain percentage of members required to do business by the bylaws) is present.
- Ask for corrections (corrections include changes and additions) to the minutes when approving minutes.
- Announce the business to come before the meeting in proper order.
- Recognize members entitled to the floor.
- State a motion after it has been seconded and before asking for discussion. Restate the motion before calling for a vote.
- Call for the negative vote even if the affirmative vote seems to indicate approval.
- Announce the result of each vote and what will happen as a result of the vote.
- Expedite business as much as possible without denying members their rights. Business may be expedited by taking a vote by "general consent" when there is no objection.

Parliamentary rules to remember include:

- It is not necessary to second a motion or resolution that comes from a board or committee. Two or more persons have already approved the motion.
- It is not necessary to take action on a committee report which is only factual.
- Do not sign a committee report or minutes except by name and office of the signer. "Respectfully submitted" is obsolete.
- Do not record opinions in the minutes, complimentary or otherwise. Minutes should include only motions and action taken, not a report of discussion.
- Do not adopt the treasurer's report. It is filed for audit, and the audit report is adopted when presented.
- Do not "turn the meeting over" to anyone. The chair is always in control of the meeting until adjournment.
- The gavel is presented to the incoming president at the final meeting only as a symbol. The outgoing chair adjourns the final meeting.
- *Ex officio* means "by virtue of office." If given the privilege of *ex officio* status, a member has all the rights of the committee or board, including the right to vote, does not have the obligations of the committee or board, and cannot be counted in the quorum. The chair should notify *ex officio* members of meetings just as regular members.

PROMOTING MEMBERSHIP

Membership is everyone's concern. Every committee and every member in your alliance can and should help with recruitment and retention. Every member, in his or her day-to-day activities, can encourage new members to join, can enhance the image of the alliance, and can tell people what the alliance is doing that is making a difference.

Membership is marketing, which is promoting. Your "sales force" is your membership, led by your membership committee. You should establish membership goals, develop plans to meet the goals, implement the plans, evaluate your progress, and make changes in your plans as appropriate.

Listed here are some basic membership recruitment ideas that you can use regardless of the size of your alliance:

- On a monthly basis, ask your medical society for a list of names of physicians new to the area. Focus on the spouses by visiting them and encouraging them to join the alliance to meet and work with members of similar interests in their new community. The NCMS Alliance can also help prepare the list of names. Contact Headquarters for more information.
- Plan a "kick-off" event early in the year. This can be done in conjunction with your local medical society. Follow up with personal contact.
- Offer play groups and babysitting services during monthly meetings to enable potential members with young children to attend.
- Hold meetings at the same time as the medical society. Build a "membership team" with your medical society to coordinate membership recruitment efforts.
- Send your publications to all potential members at least once a year.
- Request a section in your medical society's newsletter to promote programs, announce upcoming meetings, and encourage membership.
- Plan fun activities and social gatherings for couples and families.

In the long run, keeping your current members is just as important to your alliance's growth as recruiting new members. Retention is an on-going process. Below are some ideas for successful retention efforts:

- Not only should your membership mailings go out on time, but they should look appealing and professional. Highlight accomplishments.
- Follow up any retention mailing with telephone calls to those who don't renew. Poll non-renewing members to assess their opinions. This can serve as a valuable tool going forward. By expressing an interest in why a member chooses not to renew, you can re-engage that member.
- Conduct a membership survey to determine current and potential member interests. Report the results.
- Encourage flexibility with meeting times.
- Evaluate the interest in and effectiveness of meetings and communications.
- Make periodic contact with physicians' spouses in neighboring counties without organized alliances and encourage them to join with your alliance.
- Nurture those members who have been involved in the alliance for a long time.

Also, remember that we are competing in communities that have many organizations needing volunteers. Good programming will encourage an active membership as each member realizes that the alliance is relevant to his or her life. Encourage each member to reach out to a new member. Remember the career-oriented spouses, widows, retired spouses, male spouses, resident physician spouses, and medical student spouses.

The NCMS Alliance Vice-President for Membership Development is responsible for working with county alliances on the challenges of membership. The Vice-President chairs the Membership Development Committee and is available to help you and your alliance with membership issues and concerns.

TIPS ON HEALTH RESOLUTIONS

County alliances may bring health resolutions to the NCMS Alliance for adoption. Key points to remember include:

Health-related Resolutions - Health-related resolutions pertaining to matters of interest to the NCMS Alliance may be brought before the House of Delegates for action, providing that these resolutions are received in NCMS Alliance Headquarters sixty days prior to the House of Delegates meeting in the year they are to be considered for action. Resolutions may be submitted by the Board of Directors, by NCMS Alliance standing committees, or by county alliances.

Fiscal Notes - All resolutions introduced whose implementation necessitates an expenditure of funds must include a fiscal note of a specific dollar amount.

Structure of Resolutions - The essential element of a resolution is the portion containing one or more "resolved" sections setting forth its specific intent.

Acceptance of Resolutions - All resolutions submitted for consideration by the House will be referred by the president to the appropriate persons to be checked for proper form, legal considerations, and conflicts with the policies of the NCMS or the policy of the NCMS Alliance. Simultaneously, they will be referred to the Finance Committee if a fiscal note is included. A notice of receipt of a resolution shall be sent to the person by whom it was submitted

Presentation of Resolutions - Resolutions which have been received by the deadline will be presented to the membership in writing or published in the *State Alliance Newsletter* and will be regarded as officially received. Date and time of Reference Committee hearings shall be included with this listing.

Reference Committees - Reference committees are composed of three delegates (a chair and two members) appointed by the president to consider resolutions. The reference committee is open to all members of the NCMS Alliance and guests. Any member may speak on the resolution. Guests may, upon recognition by the chair, be permitted to speak. The chair may ask any individual who might have information helpful to the committee to speak. Following the hearings, the committee will study the testimony and consider what is best for the NCMS Alliance. The committee shall recommend adoption, rejection, or substitution.

Reference Committee Report - At the House of Delegates, the presiding officer will call upon the chair to introduce resolutions. The chair will state the committee's recommendation. The floor will be opened for discussion. Upon adoption, the resolution becomes official policy of the NCMS Alliance.

2007-2008 Calendar

2007

August	1-2	NCMS Alliance Board Meeting and Retreat, Pittsboro, NC
September	17	Teleconference with County Leaders (call NCMS Alliance for details)
	29	AMA Alliance Leadership Development Conference, Chicago, IL (September 29 - October 2)
October	19	NCMS Alliance Board Meeting, Charlotte, NC
	20	NCMS Alliance Brunch at the NCMS Annual Meeting, Charlotte, NC
November	2	9th Annual Symposium: The New Millennium Adolescent, Cary, NC
	30	NCMS Alliance Grant Application Deadline

2008

January	30	NCMS Alliance Board Meeting (Note: Teleconference)
February	29	NCMS Alliance Grant Deadline
March	30	AMAA National Advocacy Conference, Washington, D.C. (March 30 - April 2)
April	17-18	NCMS Alliance 85th Annual Meeting, Greensboro, NC
April	19	Get Fit NC 5K, Greensboro, NC
June	15-17	AMAA Annual Meeting (Chicago, IL)

2007-2008 State and County Contacts

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