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I. INTRODUCTION

Welcome to the AHLA Best Practices Guide for Practice Group (PG) Leaders! This document has its roots in the American Health Lawyers Association’s (AHLA’s) 2014 Annual Meeting. At that meeting, during the annual PG Leadership Training, many attendees (both first-timers and long-timers) expressed a need for a “go-to” resource that would:

A) Help inform their activities as leaders;
B) Assist them in perpetuating and further refining leadership techniques with proven track records; AND, at the same time,
C) Help them avoid pitfalls experienced by others in the past.

This Guide is the product of those requests, and showcases the results of hundreds of hours of work by some of AHLA’s most experienced and enthusiastic PG leaders.

We want to emphasize that this Guide is intended to be a living resource. That is, the Board of Directors and our AHLA staff expect that, as you discover and implement the “next great idea” for your PG (or experience a less than favorable outcome that you would like to help others avoid), you will communicate and share those experiences with staff and with your assigned Board of Directors’ liaison. You may even wish to offer a gentle suggestion that your experience be included in the next update to this Guide. Of course, this Guide should be utilized as a companion to the PG leaders’ resource website (www.healthlawyers.org/PGLeaders), which is your dynamic online resource for PG, Task Force (TF), and Affinity Group (AG) leaders.

PGs are the “heart and soul” of AHLA, and effective PG leaders help keep that heart beating and that soul vibrant. Thanks in advance for all you do to help advance AHLA’s mission, and for the many ways that you serve our membership.

We would like to extend our sincerest thanks to HealthCare Appraisers, Inc. for its sponsorship of the AHLA Best Practices Guide for PG Leaders.

Marc Goldstone and Rob Niccolini, Editors

Acknowledgement for the 2017 Update

In 2017, this Guide was updated in response to feedback and numerous comments provided by the many PG, AG, and TF Leaders, and to reflect the Association’s 2016 restructuring and realignment. Among the many improvements included are a new chapter and significant updates to substantial portions of the Guide. We hope you will find the new Guide to be an outstanding resource as you pursue your Group’s objectives in the coming years. The editors and I wish to thank the following individuals for their pivotal role and generous time in making this update possible: Andrea Ferrari, Emily Grey, Rick Hindmand, and Amy Bolian.

Chip Hutzler, 2017 Guide Update Working Group Leader
II. Everything You Ever Wanted to Know About the American Health Lawyers Association (But Were Afraid to Ask)

A. Introduction

On July 1, 1997, the National Health Lawyers Association (NHLA) and the American Academy of Healthcare Attorneys (AAHA) combined into a single organization, creating the nation’s largest educational organization devoted to legal issues in the health industry.\(^1\) Since that time, the American Health Lawyers Association (AHLA) has grown to include more than 13,500 members.\(^2\) In 2017, AHLA celebrated its’ 50\(^{th}\) anniversary!

AHLA’s mission is to provide a collegial forum for interaction and information exchange to enable its members to serve their clients more effectively; to produce the highest-quality non-partisan educational programs, products, and services concerning health law issues; and to serve as a public resource on selected health care legal issues. AHLA provides resources to address the issues facing its active members who practice in law firms, government, in-house settings, and academia and who represent the entire spectrum of the health industry. As a 501(c)(3) organization, AHLA elects not to advocate for or against any particular policy proposals. The public interest efforts of AHLA are designed to provide \textit{pro bono} materials to the public at large.\(^3\)

In general, “health law” is the body of federal, state, and local laws, rules, regulations, and cases that governs the health care industry. The practice of health law can focus on any number of different areas, such as antitrust, corporate compliance, fraud and abuse, transactions, health information technology, reimbursement, quality of care, and taxation. Accordingly, AHLA is organized around 16 different Practice Groups (hereinafter, “PGs”) that reflect the diversity of this body of law:

- Academic Medical Centers and Teaching Hospitals PG
- Antitrust PG
- Business Law and Governance PG
- Fraud and Abuse PG
- Health Information and Technology PG
- Health Care Liability and Litigation PG
- Hospitals and Health Systems PG
- In-House Counsel PG
- Labor and Employment PG
- Life Sciences PG
- Post-Acute and Long Term Services PG
- Medical Staff, Credentialing, and Peer Review PG
- Payers, Plans, and Managed Care PG
- Physician Organizations PG
- Regulation, Accreditation, and Payment PG

\(^{1}\) A brief history of the AHLA is available at: \url{www.healthlawyers.org/About/Leadership/PastPresidents/Documents/PastPresidentsMemoryBook2014.pdf}

\(^{2}\) See \url{www.healthlawyers.org/About/Pages/default.aspx}

\(^{3}\) Additional information is available through the AHLA’s Public Interest Page. See \url{www.healthlawyers.org/Hlresources/PI/Pages/default.aspx}
• Tax and Finance Practice Group

Nearly three-quarters of all AHLA members are enrolled in at least one of the PGs, which provide opportunities to share ideas, increase expertise and knowledge of health law issues, and network with other health lawyers. AHLA members can also participate in four Task Forces (TFs) that focus on health law topics that stretch across PGs:

• Accountable Care Organization TF
• Behavioral Health TF
• Enterprise Risk Management TF
• Health Care Reform Educational TF

In addition, AHLA PGs sponsor 20 different Affinity Groups (AGs):⁵

• Children’s Hospital AG
• Digital Health AG
• Governance AG
• Transactions AG
• Privacy and Cybersecurity Risk, Compliance and Enforcement AG
• Tech Licensing and Intellectual Property AG
• Alternative Dispute Resolution AG
• Fair Market Value AG
• Public Health System AG
• Real Estate AG
• Immigration AG
• FDA Regulatory AG
• Research and Development AG
• Physician/Attorney AG
• Health Plan AG
• Managed Care Contracting AG
• Medicare Advantage and Part D AG
• Accreditation, Certification, and Enrollment AG
• Tax-Exempt Finance AG
• Tax In-House AG

These focused AGs develop additional educational content and facilitate networking opportunities for attorneys who work in the relevant practice areas.

B. Governance

Please see the Governance/Leadership webpage for information about current leaders serving on AHLA’s Board of Directors and other governing groups.⁶

AHLa is governed by a Board of Directors that consists of 28 members. The Board is generally responsible for establishing AHLA policy and has specific oversight responsibilities for a variety of topics. Each Board member serves for a three-year term that is renewable for an additional term.

⁴ See www.healthlawyers.org/ Members/PracticeGroups/Pages/default.aspx#sthash.x6z70zZb.dpuf
⁵ See www.healthlawyers.org/ Members/PracticeGroups/Pages/affinitygroups.aspx
⁶ See www.healthlawyers.org/ About/Leadership/Pages/default.aspx
three years. The Board meets twice a year in person and several times a year by phone conference.\footnote{7}{See www.healthlawyers.org/About/Pages/default.aspx#sthash.PYewTTMi.dpuf}

The Board has an “ex officio” Executive Committee composed of eight members as specified in the Bylaws. The Executive Committee meets four to six times a year in person and by telephone conference. This group helps fulfill the Board’s governance responsibilities between meetings of the full Board.

C. Board Committees

In addition, Board members are appointed by the President to serve on the following standing committees:

- Programs Committee: Provides oversight for AHLA’s educational programs and plans the Annual Meeting.
- Public Interest Committee: Advises the Board regarding the initiation of activities in the public interest and the fulfillment of the objectives of the nonprofit purposes of the Association.
- Membership Committee: Advises the Board regarding the further development of services to the members and the expansion of the membership of the Association.
- Finance Committee: Selects the auditor, reviews the annual audit statement, and advises the Executive Committee and the Board of the findings. Prepares and recommends to the Board the adoption of a proposed budget and activity plan for the Association. Oversees the Association's investments and retirement plan.
- Practice Group Committee: Develops and recommends standards and practices to be followed by each PG, TF, and AG, as well as budget and activity requests from each of these groups.\footnote{8}{See www.healthlawyers.org/About/Leadership/Pages/PGCIntro.aspx}
- Professional Resources Committee: Makes recommendations to the Board with respect to the manner in which the Association should develop and distribute publications of interest to attorneys and others in the field of health law.
- Nominating Committee: This committee consists of the previous two AHLA Presidents, along with the current AHLA President, President-Elect, President-Elect Designate, and two at-large members.

D. Special Committees and Councils

Members may also serve on the following councils and committees:\footnote{9}{See www.healthlawyers.org/About/Leadership/Pages/default.aspx#sthash.7wQpgZ4m.dpuf}

- Dispute Resolution Council: Advises and assists AHLA in developing and promoting dispute resolution services and educational programs for members and non-members.\footnote{10}{See www.healthlawyers.org/About/Leadership/Pages/DRCIntro.aspx}
- Diversity+Inclusion Council: Serves as a resource to AHLA in achieving its goal of increasing diversity of its members and leaders, and to create a welcoming and inclusive environment. Among other responsibilities, the council recommends programs/initiatives on ways in which AHLA can better recruit and retain members from a broad spectrum of diverse backgrounds; identifies barriers to participation and suggests initiatives to
encourage members from diverse backgrounds to become more involved in AHLA; and facilitates connections and community.\textsuperscript{11}

- Women’s Leadership Council: Provides a discussion forum for members so that AHLA women members are provided with the skills, tools, and access to AHLA leaders and colleagues that make it possible for them to become more effective; networking events; and professional development opportunities.

- Young Professionals Council: Provides opportunities for young professional members to network and to develop leadership skills. AHLA’s Young Professionals Council (YPC) serves as a resource to PG leadership to help identify relevant content that would appeal to AHLA’s young professional members. The YPC holds quarterly calls and PG leaders are welcome to bring issues for discussion to the Council. YPC members are also open to participating in open membership calls to address issues of common concern. The Young Professionals Community can be used to promote resources or activities of a PG, AG, or TF to young professionals. As AHLA looks to grow its engagement of young professionals, it is important that the PGs maintain a focus on young professional engagement through content, opportunities for contribution, and leadership development.

- Fellows Coordinating Committee: Recommends new slate of Fellows to the Nominating Committee for consideration and helps plan for the annual business meeting.

- Journal of Health & Life Science Law Editorial Board: Closely reviews and evaluates submissions for scholarship, analysis, and usefulness to AHLA members. The Board also guides Journal content by monitoring article performance, recommending future topics, and identifying potential contributors.

- Quality Council: Supports the development of high-quality content throughout the Association. It has jurisdiction to review and make suggestions regarding content that emerges out of any of the Association’s functional areas: Professional Resources, Programs, PGs, Public Interest, Membership, or web-based products or services.

- Dispute Resolution Review Board: Provides guidance on the Association’s Dispute Resolution Service.

- Program Planning Committees: Plan in-person programs.

E. Membership and Leadership Diversity and Inclusion

AHLA’s membership is diverse not only in background and experience, but also in practice areas and settings. AHLA members include in-house counsel; compliance and privacy officers; finance officers; health care consultants; regulatory professionals; and those employed in health care, public health, government, and academia.\textsuperscript{12} More than three-quarters of AHLA members practice health law full time and more than 80% have been in the field for more than five years.

Diversity and inclusion are core values of AHLA. They are integral to our self-understanding and our embrace of a vibrant health law community. In principle and in practice, AHLA values and seeks to advance and promote diverse and inclusive participation, regardless of gender, race, ethnicity, religion, age, sexual orientation, gender identity and expression, national origin, or disability.\textsuperscript{13} We strive to leverage diversity and actively practice inclusion as a critical mission strategy to ensure that all members can participate equally in AHLA educational and leadership opportunities.

\textsuperscript{11} See www.healthlawyers.org/About/Leadership/Pages/ACIntro.aspx#sthash.0lNBYZFq.dpuf

\textsuperscript{12} See www.healthlawyers.org/About/Pages/default.aspx#sthash.PYewTTMi.dpuf

\textsuperscript{13} See www.healthlawyers.org/About/Pages/default.aspx#sthash.PYewTTMi.dpuf
As noted above, the Diversity + Inclusion Council serves as a resource to AHLA in achieving these goals. It is composed of up to ten AHLA members who plan, facilitate, and host numerous events including: receptions; co-sponsorship of distance learning events with the Young Professionals and/or Women’s Leadership Councils; panel discussions at Programs; and networking receptions at area law schools with the YPC. The Council also is responsible for monitoring and reporting on the collection of demographic data from the membership.
III. CHAIR POSITION (PG, AG, and TF)

A. Introduction—You are the CEO

Welcome to one of the most important roles in AHLA: Chair of a PG, AG or TF (your “Group”). This is a different role from the Vice Chair position that you may have held for a few years; you are now your Group’s CEO. Rather than work on discrete tasks in your Vice Chair “silos,” you are your Group’s leader. You set the agenda for the term; make the assignments for your Vice Chairs; chair regular meetings; oversee the progress of your team; make the necessary adjustments to keep your team on track throughout the term; and are the liaison between your Group and other PGs, AGs and TFs and other AHLA leaders. Perhaps the best piece of advice we can give you is this: pick good people, set clear goals, communicate those goals, offer to assist as needed, and then, lightly watch and guide your team to let them do the great work they are capable of doing. If you plan well for each term with clear goals and tasks, delegate tasks effectively, support your Group’s Vice Chairs and volunteers, and set aside some of your valuable volunteer time to take an active role in leading your Group, you will do well, create value for your Group’s members, and, hopefully, have some fun along the way.

B. Official AHLA Guidance

Before you get started, take a look at the official guidance created by the PG Board Committee, “Sample Division of AHLA Practice Group Leadership Tasks” accessible on the PG, TF, and AG leaders’ website (www.healthlawyers.org/PGLeaders) under the “Policies & Procedures” tab. This is a great place to start to understand the overall responsibilities and assignments for PG leaders. The Board and the PG Board Committee have delegated to you fairly wide discretion to manage your Group, so once you have reviewed the basics, you will want to set forth your own vision of responsibilities and assignments for your Group, your team of Vice Chairs, and all of your PG’s volunteers. Remember that communication is key: your leaders, volunteers, PG’s members, and most of all, your AHLA staff support will never know what you are thinking unless you tell them, and provide the opportunity for adequate discussion of your vision, ideas, and goals.

C. Suggested Best Practices

We have distilled the experience of some of AHLA’s most successful PG/TF/AG chairs into the following guidance. This guidance certainly does not mean that there is only one way to lead your team. We think that these suggestions bear careful consideration. Do not hesitate to strike out in another direction if you feel that a new approach will be more productive. If you do have new ideas about leading your team, consult with other PG/TF/AG Chairs, prior PG/TF/AG Chairs, or your Board liaison because they may have also tried different approaches over the years and can offer valuable insight.

1. Some Quick Tips from Successful Chairs

Here are a few one-liners from Chairs who were highly successful:

“Remember that everyone is a volunteer.”

“Make the most of it and do not be afraid to take risks.”

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14 For simplicity, this chapter sometimes refers generally to PGs, AGs and TFs collectively as “Groups” and individually as a “Group.”
“Establish a focus each year for your PG.”

“Nurture your relationship with AHLA staff.”

“Surround yourself with good Vice Chairs.”

“Communicate regularly with your PG leadership.”

“Delegate as appropriate and do so effectively.”

“Challenge your VCs to achieve, and they will rise to it.”

“Don’t forget to have fun!”

“There are probably more ineffective practices than best practices.”

Building off of those tips, the remainder of this guidance will distill and explain the essence of each tip in terms of effective best practices in three broad areas: leadership, organization, and business relationships.

2. Leadership

Since you will be the CEO of your Group, first, and foremost, you should act like a CEO. It is your responsibility to set the vision (e.g., Annual Work Plan\(^\text{15}\)) and the tone (e.g., management style) for your Group each term. You are not required to follow the same plan or emulate the style of your predecessor. You are encouraged to make the Chair role your own; in order to do that, you need to be passionate about this new leadership role in order to inspire your team to help achieve your vision. Regrettably, many lawyers do not have formal leadership training and sometimes have difficulty delegating tasks effectively. Fortunately, good leadership is a skill that can be learned; one need not be a “born Chair.” If you do not feel that your career development to this point has honed your leadership skills enough, take some time before your first term starts to read a few “self-help” books about management and leadership. If time is short, the *One Minute Manager* is a solid resource to help get you off and running. Additionally, it is a great idea to set up time (preferably at least an hour) to speak with your predecessor(s) about their leadership experiences, so you can learn from their challenges and build on their successes.

An essential leadership technique is communicating your vision for your Group’s activities and accomplishments over the next term and subsequent terms. Think about a broad and lofty goal for each term; do not hesitate to be bold. Take some time to map your vision out in writing and share it in draft form with your Group’s Vice Chairs so they can see the direction you want to head with both new and existing projects. There may be crossover on projects and your vision document will help identify where you need to have Vice Chairs collaborate and where you may need more volunteer resources. If you are new to the role, ask your current Chair if you can get

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\(^{15}\) Refer to chapter VIII for a description of the required Annual Work Plan process, which is the primary responsibility of the Vice Chair of Strategic Planning and Special Projects. However, if your PG/TF/AG has no Vice Chair of Strategic Planning and Special Projects, then the Annual Work Plan is the responsibility of the Chair to develop, document and track in accordance with the process described in Chapter VIII.
started on this prior to the Annual Meeting so you can hit the ground running when you become Chair at the Annual Meeting, and not try to get “kick started” afterward.

As far as drafting a vision goes, the simplest thing to do is to incorporate it into the Annual Work Plan (generally created by the Vice Chair of Strategic Planning and Special Projects); that Annual Work Plan will include your vision for each Vice Chair’s activities for the program year. The Annual Work Plan does not have to be much more than a document that identifies your goals for the Vice Chair’s substantive area of responsibility; for example, “sponsor a webinar series” or “design a practice area toolkit.” The Annual Work Plan then usually will go on to list, at a high level, the tasks needed to accomplish each goal. It may even include assignments and rough timelines. Additionally, you can elect to utilize AHLA’s project tracking template for this purpose. The main point is to use whatever tools will help you effectively communicate and follow through on your vision. Whatever you do, make sure that, in the month or so following the Annual Meeting, your Group’s Annual Work Plan is discussed and drafted (and then completed by September 15), and make sure your plans and agenda reflect the Annual Work Plan’s stated goals.

One of the most important components to good leadership is to be able to motivate individuals to do the work required on various projects. This skill is especially critical in an association where your “staff” are volunteers of extremely busy lawyers. Remember that motivation must be tempered with patience and respect for your Vice Chairs’ other professional and personal obligations. Keep your Vice Chairs focused on the good work they are doing for your entire membership, and share positive feedback (and constructively critical comments) you may get from members or AHLA leadership about the work your Group is doing. Make sure to praise in public, but correct in private. Calling out a Vice Chair or volunteer in a public forum by recognizing a particularly effective bit of work, or a compliment received by another leader, is extraordinarily useful. In other words, your Group’s leadership and volunteers need to know that the hard work they are dedicating to your Group does make a difference to a member, a staff member of AHLA, or a leader within AHLA. However, if corrections are needed, do not hesitate to make them; just be objective, and do so in private. If the corrective issue is a thorny one, consult with your AHLA staff person and your PG Board Committee liaison before taking action; they can usually offer helpful strategies and, in extreme cases, your PG Board Committee liaison can act on your behalf if the liaison believes that is in the best interest of your Group and AHLA.

### 3. Organization

If you are not an organized person in every other area of your work and personal life, get organized for just the Chair role. Your Group will not run itself; that is your job. Your Vice Chairs will do the work you ask them to do, but their job is not to run your Group. AHLA staff will work hard to support you, but they will not run your Group either. Balancing your work, personal, and new volunteer CEO-like roles will be challenging and that is why you have to be highly organized. Get that work plan for the term done and finalized at or shortly after the Annual Meeting. Then get to work managing your Group. Many of the PGs have over 1,000 members, and you are working for their interests and the interests of the overall Association. There will be many moving parts to your Group, quite a few projects to manage, and, if you take on a new bold project, lots to do. Being highly organized is key to your success as a PG Chair.

To keep everyone on track with your vision, always make sure to attend your regular PG leadership conference call meetings with all of your Vice Chairs and your AHLA staff support person. Even if a meeting is brief, make sure to talk with each of your Vice Chairs to understand
the progress that everyone is making with tasks and new developments (or the difficulties they are having in achieving the goals you’ve set). Email meetings can be used to supplement the regular PG leadership calls, but should never be used as a substitute for the live calls. On the calls, make sure to use your agenda to give every Vice Chair an opportunity to present his or her projects, progress, and concerns, and make sure to encourage your Vice Chairs to comment on each other’s work; that is one of the best ways to keep a cohesive PG management team and create synergies. Just because a Vice Chair is handling strategic projects during a particular term does not mean he or she does not have great ideas for programs or publications that he or she can share. Once the call is done, your work for the next meeting begins. A good practice is to touch base with each Vice Chair individually in between calls to make sure projects are moving forward. In short, you want to set your Vice Chairs up for success by establishing an expectation that their assigned tasks will be completed prior to each call, rather than doing the task work during the meetings. Although this technique seems simple, in an organization of volunteers, the more you can do to shepherd projects, the more successful your PG will be completing them (and finishing on time). Make sure to focus on your Group’s progress to meet the criteria in the Group Annual Work Plan at each meeting; that is the only way you will successfully finish the program year and complete your goals.

When you have effective communication with your Group’s leadership, you will quickly learn if there are any issues with your vision of your Group or your progress toward the goals in your Group’s Annual Work Plan. Your one-on-one calls with Vice Chairs should focus each Vice Chair on the work he or she needs to complete to execute your vision. If you get the sense that a Vice Chair is swamped at work and needs some help accomplishing tasks, you can recruit a dedicated leader from your Group or another Vice Chair to help. Some PGs have Leadership Development Programs (LDPs) and others have less formal lead coordinator roles that are used to recruit good volunteers to help staff projects.

If you do recruit volunteers, assign the management of each volunteer to a specific Vice Chair. You will have enough to do managing the work of your Vice Chairs. On very large projects like a 50-state survey, there may be 20, 50, or even 100 volunteers. Forming a solid team to assist the Vice Chair in charge of a large project will be critical, whether that team consists of two participants or a panel of member-volunteers.

It is essential to regularly touch base with AHLA support staff and leadership. They will always offer ideas for managing and organizing your Group’s work, and may be able to marshal additional resources to assist in moving ahead “stuck” projects.

4. Personal Relationships

Often overlooked in today’s busy work environment of clogged email inboxes, snippy text messages, and the solitary nature of law practices in general is the need to develop good personal relationships with the people you are managing. Here, the little stuff matters. Send thank you notes (yes, hand-written), especially to AHLA staff. If you are at in-person programs with PG leadership, take time to meet with them as a small group or one-on-one. Let your Vice Chairs and volunteers take the credit for work they have done on a project, and if they are reserved, be sure to praise them in public by citing specific examples. If you let them shine when good work is accomplished, they will become more interested in their volunteer work and supporting your vision for your Group. You also will be able to identify potential new Chairs to take over from you and new Vice Chairs to join your team.
Make it a point to call and/or email your AHLA staff and PG Board Committee liaison from time to time. They both are good resources for you to share ideas and to troubleshoot issues. Spend time with both of those individuals at in-person programs.

A more difficult skill to develop as a Chair is to know when to step in and protect your Group leadership and volunteers from any issues that may arise during your tenure. For example, a member may be critical of a newsletter article or a project may not be progressing due to significant delay from a volunteer. Good Chairs understand that they are the CEO and it is their job to intervene when needed, adapt as needed, and positively move your Group work forward. Blaming others is not the answer to getting things done; your job is to figure out how to get things done, while respecting a wide variety of diverse interests that constitute the essence of an association such as AHLA. Be respectful, ask probing questions (“Why do you feel that way” and “What has your experience shown about this in the past” are great questions to get through tense moments), and give respect to differing viewpoints even if your final decision about what is best for your Group does not serve a particular member’s interest. You need to be a consensus builder, but, at the end of the day, you need to do what is best for your Group and for AHLA overall, and, sometimes, that means that certain interests cannot be advanced. Be prepared for that.

Remember too that you have a personal relationship with all of your customers, (i.e., your Group’s members). Think about them, reach out and ask what they need and want, and determine how your team’s work can bring value to your PG’s members. They will know who you are because your name and photo are on AHLA’s website and often in the Connections magazine. When you meet members, take a moment to ask about their professional practice setting, and ask them two important questions: (1) what have we done well in your Group; and (2) what would you like us to do in addition/differently? Take note of their responses, and integrate them into your thinking about your Group’s activities and strategic plan. Thank them for their input and offer them the opportunity to assist on projects of interest to them. Those are the keys to a positive interaction with a PG member.

D. Conclusion

There is no cookie cutter approach to being a PG, AG, or TF Chair. Everyone has his or her own management style that he or she can and should bring to the role. The key to success, however, is to be an effective leader. If that does not come naturally, you need to take the time to train yourself. Spend some quiet time before you step into the role thinking about what you want to accomplish, map it out, make thoughtful Vice Chair assignments, recruit good volunteers to help your Vice Chairs, set clear and well defined goals, and get to work managing your Group. The time and energy you put into the role will be recognized by your Group’s membership and by AHLA. Most of all, make it fun for yourself and your team.

E. Website Resources

Information and resources for all PG, TF, and AG leaders are available on the AHLA website (www.healthlawyers.org/PGLeaders) and provide the following information:

- **Overview**: contains important program year reference materials and links to resource webpages for each area of leader responsibility;
- **Policies & Procedures**: contains current PG guidance, procedures, and policies that govern PG, TF, and AG operation;
• **Contact Information:** contains PG, TF, and AG Vice Chair contact information, contact lists by area of leadership responsibility, and PG Board Committee and Liaison contact lists for current program year; and
• Other relevant information/resources added as needed.
IV. VICE CHAIRS OF MEMBERSHIP

The lifeblood of any association is its membership, and AHLA PG/TF/AG Vice Chairs of Membership play an important role in maintaining and growing this lifeblood. Sustaining and growing membership can seem like a daunting task, particularly for those new to the role. This chapter provides guidance to help those in the role, insight into the basic responsibilities of the Vice Chair of Membership, explanations of best practices, and creative ideas that can benefit the PG, AG, or TF as well as AHLA.

A. Basic Responsibilities

The AHLA Board of Directors PG Committee has developed a “Sample Division of AHLA Practice Group Leadership Tasks” accessible on the PG, TF, and AG leader website (www.healthlawyers.org/PGLeaders) under the “Policies & Procedures” tab. The list is intended to serve as a guide for leaders and has been refined over the years as we realign staff, eliminate redundancies, streamline, and improve efficiency. Tasks and responsibilities can be completed either by the PG, AG, or TF leader or through the involvement of or delegation to other volunteers. In fact, involving volunteers is an effective way to promote the engagement and involvement of members. The list of Vice Chair of Membership responsibilities is as follows:

- Solicit and Review PG members’ feedback on existing PG, AG, or TF benefits and ideas for new benefits/resources etc.
- Solicit and track volunteers for various activities and projects.
- Welcome new members.
- In the case of PGs, develop TFs and/or AGs, if deemed appropriate by the PG leadership.
- Participate in Board Membership Committee activities as appropriate.
- Coordinate with AHLA’s Membership Department staff and the Board’s Membership Committee on efforts to recruit, engage, and retain AHLA members.
- Coordinate outreach to young and otherwise underrepresented members.
- Assist with promotion of the AHLA Mentoring Program including outreach to new members, young attorneys, and otherwise underrepresented members.
- At times, responsible for writing summaries of activities under one’s scope of responsibility to be published in AHLA Connections.

B. Existing Membership

1. Reporting to PG Leadership

The Vice Chair of Membership should review, summarize, and report on membership statistics during leadership calls. Enrollment statistics and a roster of new members are posted to the leadership website each month. The Vice Chair of Membership can also utilize the online Membership Directory to identify members of specific PGs and AGs. In reporting to the PG or AG leadership, the Vice Chair of Membership may want to provide information on the total number of current members and whether there has been an increase or decrease since the start of the program year. (S)he can also provide information about how consistent this is with the trends in the organization as a whole. In reviewing these reports, the Vice Chair of Membership should be mindful of how the PG’s or AG’s initiatives and efforts are impacting membership.
2. Welcoming New Members

It is exciting when members join a PG, AG or TF, and it is important to welcome each one; contact information for new members can be found on the leadership webpage. Vice Chairs of Membership can contact new members by phone or email to share information about the PG, AGs, and TFs, and ways to get involved. Examples of welcome letters are available on the leadership website (www.healthlawyers.org/PGMembershipResources).

3. Surveying Terminated Members

Another very important role for the Vice Chair of Membership is contacting PG members who opt to leave the PG. AHLA employs a contract agency to perform the initial survey of all members who do not renew their membership in AHLA or in one or more PGs. In the event that the agency determines that the member has terminated for other than a routine reason (i.e., forgot to renew, don’t practice in that area any longer, etc.), the terminated member’s name and contact information will be provided to the pertinent PG’s Vice Chair of Membership for a follow up survey call. These survey calls provide an excellent peer-to-peer communication opportunity and often provide helpful information about the reasons the PG’s or AG’s membership may be changing. For example, one PG learned that generally, people who were dropping out of the PG had terminated AHLA membership altogether, had terminated for financial reasons, or had changed jobs. In formulating a survey for terminated members, the following questions will be helpful: Why did you join the PG (or AG)? Why did you leave? What could AHLA/PG have done better? What could we do to get you back? Don’t be offended by anything you hear; rather, view their responses as valuable information that you might not otherwise be able to obtain. Always remember to ask: Is there anything we can do to earn your membership back?

4. Promoting the Mentoring Program

AHLA’s Mentoring Program matches seasoned health law practitioners (mentors) with less experienced health care lawyers (mentees) to permit the mentors to share their professional values, to help their mentees address practical concerns and problems in advancing their careers, and to promote greater involvement in AHLA and other professional associations. The Mentoring Program builds on AHLA’s commitment to create a collegial community and meet members’ needs for networking and relationship building; to promote leadership, self-development, and professional competencies; to provide opportunities for career planning and development; and to provide guidance on specific fields of interest within health care law.

The Vice Chair of Membership should become familiar with the AHLA Mentoring Program (www.healthlawyers.org/Mentoring) and share that information with other leaders.

C. Identifying New Members

The Vice Chair of Membership should approach the work and meetings of the PG, AG, or TF ever mindful of opportunities to engage and increase membership.

1. Attendees of In-Person Programs, Webinars, Open Membership Calls

Many potential new members for PGs, TFs, and AGs attend AHLA in-person meetings and Vice Chairs of Membership should be on the lookout for opportunities to connect with them and promote their Group. One way is through networking events (discussed in more detail in this chapter below).
AHLA sends follow-up letters to non-members following in-person programs and webinars. Additionally, when the PG, TF, or AG hosts webinars or open membership calls, the Vice Chair of Membership may want to include remarks about how one may join the PG or AG.

2. Membership Campaigns

Membership campaigns are yet another way to increase new membership. When AHLA conducts a “Member-Get-A-Member Campaign” the Vice Chair of Membership can help promote the campaign to PG members. In addition, AHLA’s membership staff always welcomes your input for new and innovative ways to increase membership and/or retention.

3. Nontraditional Sources

Collaboration with other associations in the health care field can be a unique way to identify new membership. There are a number of collaborations that various groups have piloted. The following are some examples:

- Joint membership arrangement with National Association of Medical Staff Services (NAMSS), which includes an enrollment in the Medical Staff, Credentialing, and Peer Review PG. AHLA and NAMSS collaborate on distance learning events and cross-referral of speakers for meetings.
- Joint membership arrangement with the Association for Law, Medicine and Ethics (ASLME).
- Joint membership arrangement with the National Association of Certified Valuators and Analysts, which includes enrollment in the Hospitals and Health Systems PG.
- Centers for Disease Control and Prevention that includes collaboration on distance learning events. For example, the Hospitals and Health Systems PG and Public Hospital System AG worked on a joint webinar series that resulted in more than 60 new AHLA members.
- Healthcare Financial Management Association and the Fair Market Value AG.
- Healthcare Information and Management Systems Society and the Health Information and Technology PG.
- American Telemedicine Association and Health Information and Technology PG.
- National Bar Association.
- Health law sections of various state bar or health law associations.

Contact msc@healthlawyers.org when you believe there are opportunities to collaborate with groups that share subject matter interests. There may be opportunities to benefit both memberships through collaboration on joint educational programming, publications, or other coordinated project and the AHLA staff can help determine potential next steps.

D. Keeping Members Engaged

Not only is it important to obtain new membership, but it is critical to keep existing membership engaged. The Vice Chair of Membership should be alert to opportunities to do so. Maintaining a volunteer talent pool, tracking specific interests of group members, and coordinating networking events are ways to keep members involved.
1. Tracking Volunteers and Members

The Vice Chair of Membership should have a mechanism to keep up with group members, including contact information and, if possible, each member’s particular interest and area of focus. This information can be helpful when groups are looking for individuals with particular expertise for volunteer, speaking, or writing opportunities.

Another important reason to track areas of interest in the PG’s membership is to identify trends that can be used in the PG’s Annual Work Plan. PGs have the ability to sponsor and/or promote AGs and TFs in areas of special interest. While the primary responsibility for working with these sponsored groups is typically with the Vice Chair of Strategic Planning and Special Projects, the Vice Chair of Membership should collaborate with their colleague to identify possible opportunities to sponsor AGs based on group members’ interests. It becomes much easier to identify these opportunities when those interests are being tracked.

2. Volunteer Talent Pool

A number of PGs, TFs, and AGs have created a “Talent Pool.” Talent Pools are composed of members who have indicated an interest in volunteering or participating in the PG, TF, or AG, but who are not currently serving in a leadership position. There are a variety of sources that the Vice Chair of Membership can look to for populating the talent pool. Those include members who indicate an interest in volunteering in response to a call for volunteers, those who apply for leadership positions or appointment to a Leadership Development Program (LDP), past alumni from the group’s LDP, or anyone who has expressed an interest in volunteering (or who has been recommended for such involvement). Including these members in the talent pool is a way to avoid losing touch and keeps them involved and engaged. As the Talent Pool is populated, the Vice Chair of Membership should manage the group by tracking names, contact information, and specific areas of interest for each member. A simple Excel spreadsheet is recommended to keep and maintain this information, and for ease of passing it along to future Vice Chairs of Membership.

When recruiting members to join the Talent Pool, it is important to help the potential members understand the benefits of participating. Members of the Talent Pool will often get the “first change” to participate in interesting and innovative PG projects. Many groups have found that once this talent pool resource is available there are many ways to make use of the volunteers. The work of the Group’s leadership becomes a little easier with a go-to group of volunteers who have already indicated an interest in contributing. The Vice Chair of Membership should take the lead on communicating volunteer opportunities with the talent pool, providing frequent notices to members to keep them involved and engaged, and providing early notice of the PG’s (or TF’s or AG’s) plans.

3. Networking Events

PGs, TFs, and AGs can keep existing members engaged and recruit new members through informal networking events at AHLA in-person programs. These events can be promoted on the in-person program Community and should be scheduled to prevent conflict with other major events. Note that the Vice Chair of Membership may wish to enlist additional help with this type of event, by engaging existing volunteers from the talent pool or LDP.

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16 See [http://communities.healthlawyers.org](http://communities.healthlawyers.org)
For a networking event, a venue can be selected that is in or near the conference hotel to allow for easy transportation for the event participants. These events are generally “Dutch treat,” with participants paying their own way. It may be necessary to obtain a restaurant reservation large enough for the anticipated number of participants; some restaurants may require a deposit. Some networking dinners have featured a fixed-price menu.

The location, time, and date should be established well in advance of the meeting, and the Vice Chair of Membership should communicate with the AHLA staff for timely coordination purposes. RSVPs should be directed to and tracked by the volunteer organizer. It may also be helpful to obtain payment in advance from participants to the extent possible, as this will lessen the burden of collecting money at the event. This will be more appropriate for a networking dinner as opposed to a happy hour.

At the meeting itself, it is helpful for the Vice Chair of Membership or volunteer to send an email to attendees, suggesting a meeting spot in the hotel so that groups of people can go to the venue together. It is often the case that additional people indicate interest in attending once they arrive at the in-person program, and if you are able to accommodate them, they’re usually very grateful.

Once the participants are settled at the networking event, the PG, AG, or TF leadership in attendance should make introductions and brief remarks about their Group. After that, the participants may be left to network among themselves and share their interests.

4. Open Membership and Educational Calls

Open membership calls are often popular because they are free and allow for live interaction between a Group’s leaders and its members. The Vice Chair of Membership should help organize and coordinate these calls with the Chair, other Vice Chairs, and Distance Learning staff. On the call, each leader should provide an update of activities within his or her role and solicit ideas for new activities and volunteers for these or other, already existing projects. These calls are typically an hour long and include a webinar component. Some Groups hold open membership calls on a monthly, quarterly, semi-annual, or annual basis. If the open call is the Group’s annual “state of the PG/TF/AG” call, make sure to leave time for an “open mic” question-and-answer session at the end. One technique to get the conversation started is to seed the audience with PG volunteers who pitch canned questions designed to get the listeners more engaged. Some PG’s have also started including an informal discussion topic component in their open membership calls, with a speaker presenting on a hot topic for 15-30 minutes and allowing for a short question and answers session, and reserving the second part of the call for updates on Group’s activities and reviewing volunteer opportunities. Utilizing this format has been successful in engaging participants in discussion during the calls and enlisting members to assist in various volunteer opportunities.

Educational calls are similar to open membership calls in that they provide an opportunity for interactivity between the members and presenter, but focus more on an educational component—one to two speakers are identified to present on a topic of interest to the Group’s membership for about 45 minutes and there is an opportunity for participants to ask questions. The Vice Chair of Membership should coordinate with the Chair and/or Vice Chair of Educational Programs and Distance Learning staff as needed to identify presenters and assistance with setting up and marketing these events. Events in both formats are typically an hour long and include materials/slides that are accessible via a webinar platform (in addition to
audio via phone) to support the presentation. See also chapter VI for further discussion of educational and open membership calls.

**E. Promoting Content to Members**

Developing educational content and publications falls within the scope of the Vice Chair of Educational Programs and the Vice Chair of Publications (in coordination with AHLA’s Publications staff), respectively. The Vice Chair of Membership should assist in promoting content to the AHLA membership, and assisting with social media efforts when needed, including Twitter, LinkedIn and AHLA Communities. The Vice Chair of Membership may also assist in providing input for membership materials. Examples of these types of documents are available on the leadership website.

**F. Website Resources**

Information and resources for Vice Chairs of Membership are available on the leadership website at [www.healthlawyers.org/PGMembershipResources](http://www.healthlawyers.org/PGMembershipResources). Those resources include:

- Contact information for all PG, AG, and TF Vice Chairs of Membership and relevant AHLA Committees;
- Meeting agendas and minutes;
- AHLA Membership Application and Guide, Member Benefits information, and PG/AG Enrollment Form;
- AHLA membership statistics, PG/AG/TF Enrollment statistics, and information about new PG/AG members;
- Information about AHLA’s Mentoring Program Leadership Development Program;
- Information about AGs and TFs; and
- Other relevant information/resources added as needed.
V. VICE CHAIRS OF PUBLICATIONS

The Vice Chair of Publications is responsible for the PG/AG/TF’s written (hard copy and/or electronic) communications. The Vice Chair of Publications should be prepared to identify relevant and timely publication topics, recommending the appropriate format for each publication, recruiting authors (and, when necessary, editors), and coordinating publication schedules with the AHLA’s Publications staff.

A. What to Publish?

There are a range of different types of resources (based on format and length) that are available to the Vice Chairs of Publications. Become familiar with the different PG resources using the guidelines provided by the Publishing staff. The most valuable exercise that you can engage in is to learn about these options so that you can select topics and recruit authors that are best suited for each one. A brief overview of each is set forth below:

- **PG Alerts**: Alerts are short 1,000 words or less, summaries of breaking news covering topics not already covered in AHLA current awareness resources. Topic approval by staff is required.

- **PG Bulletins (NEW)**: This is a new resource in FY 2018, which offers a short article (1,000-2,000 words) on a current topic and includes analysis and application. Topic approval by staff is required.

- **PG Newsletters**: Newsletters are 12-16 pages in length and contain short articles related to the PG’s practice area. Each PG may develop 2 newsletters each year, one in the first half and the other in the second half of the year. Specific delivery dates for each PG newsletters are set by staff at the beginning of the fiscal year.

- **PG Briefings**: These are more substantial articles, containing in-depth analysis on health law topics. They range in length from 8-over 100 pages and are often written by multiple authors.

- **PG Topical Libraries (NEW)**: These are new resources in FY 2018 containing a collection of current AHLA content from all sources and posted on a webpage where members can easily view all the most relevant and recent resources relating to their respective practice area. Links to the most recent PG resources would also be available on this page. Staff will work closely with an Editor-in-Chief from each Practice Group to launch these libraries in FY 2018 and update/refresh the content offerings every 6 months.

- **PG Toolkits**: These are collections of content offerings accessible from a single webpage. In FY 2018, with the creation of Topical Libraries, Toolkits will still be created, to the extent that the content fills a particular niche. Examples of targeted, niche Toolkits include surveys of state laws, content relating to a discrete subject area within the broader practice area of a PG, and forms banks with practice tools.
B. Topic Ideas and Selection

The most valuable service that you can perform for the members of your PG is to provide them with content that they need and will use. At every opportunity, including regular leadership calls, in-person events, and in the published resources themselves, reach out to members to solicit ideas about what content the PG should develop. Of course, it is always helpful to begin with a list of your own suggested topics, to get the dialogue going and structure ideas.

Throughout this process, the Publishing staff can provide you with essential support and information and help you flesh out the suggested topics. They can help you select the correct format and length for the topic in development, and refer you to related research resources. They can also help you determine whether the resource you are proposing is unique, to ensure that valuable authorship efforts are not directed at creating educational content that is already available to AHLA members. Most members of the Publishing staff are attorneys who are well versed in all health law issues, and who have extensive publication management experience. Reaching out to them for guidance and/or encouragement is always good advice.

C. Who Will Author the Publication?

Once you've identified your topic and the format for the publication, consider who will author your publication. Often a volunteer author will contact you or your Group with a specific topic in mind. However, if you are in search of someone to author a publication, there are a few different techniques you may want to consider:

1. Use the AHLA Call for Volunteers process

As of June 1, 2017, AHLA will be working to streamline the number of emails sent out to recruit volunteers, and will no longer be sending individual Calls for Authors to support a particular project. Membership is consolidating the Calls for Volunteers process into a single monthly campaign, with input from Publishing staff about which projects need to be included each month. If you need to recruit authors or volunteers to help with a publishing project, make sure that you let the Publishing staff know, so that they can add your project to the list of available volunteer opportunities every month.

2. Target Volunteers Who Have Expressed an Interest

One way to recruit authors is to reach out to volunteers who have expressed an interest in getting more involved with AHLA or your Group’s specific practice area. Pairing a less experienced attorney with a more-experienced attorney to write on specific topics that are of interest to your Group is an excellent way to get new volunteers involved, and coordinating such efforts with the YPC is an excellent way to develop “up and coming” authors.

3. Solicit Recommendations from Your Leadership Team

If you have a specific topic in mind and need to find someone to write on that topic, don’t hesitate to reach out to the other Vice Chairs and Chair of your Group. They often know who the leading authorities are on these subjects and have personal knowledge of individuals who would be interested in authoring a publication on a specific topic.
4. Use the Talent Pool

Check with your Vice Chair of Membership about drawing upon the group’s talent pool of individuals who have submitted proposals for other AHLA meetings, programs, or publications and weren’t selected at the time. Individuals who applied for, but were not selected for your PG’s LDP are another great resource to explore.

D. How to Ensure the Quality of Publications?

AHLA has a strong reputation for high-quality, balanced, and objective publications. The authors of each publication will be primarily responsible for ensuring that their content is accurate and meets publication requirements. AHLA staff will assist in final review of formatting and proofreading the final draft for general errors. However, there are some steps you can take as a Vice Chair of Publications to help ensure the highest quality of publications.

1. Enlist the Assistance of Peer Reviewers/Editors

As a Vice Chair of Publications, there may be topics outside of your specific practice area where it would be valuable to have someone with specialized expertise or experience review the draft before publication. Consider enlisting the assistance of an editor or peer reviewer to review each publication your Group publishes. In addition to adding a second layer of review, it creates additional AHLA volunteer opportunities for people who want to be part of the publication process but may not have the time to devote to writing an article. You may also want to consider including a call for editors and peer reviewers in the next monthly call for volunteers.

2. Determine Publication Worthiness and Appropriateness

If you determine a submission is not publication-worthy for your Group due to insufficient analysis or insight, consider whether enlisting the assistance of a co-author with more expertise or experience could salvage the publication. Other times, you may determine that a draft would be more appropriate for publication by a different PG, AG, or TF. In those situations, encourage the author to reach out to that specific Group, or forward the draft to your counterpart in that Group. If all else fails, don’t be afraid to turn down an author’s submission if you are worried about the quality. It’s hard to do, but it maintains the quality of AHLA content.

3. Keep an Eye out for Plagiarism

With the very high caliber of volunteers that AHLA enjoys, plagiarism and copyright infringement are very infrequent occurrences. However, such may unintentionally occur. If you suspect either, alert your PG Chair and the Publishing staff who can assist you with dealing with the situation.

E. What Should You Know about Logistics?

1. Set Realistic Deadlines

Set realistic deadlines for your authors. Remember, you’re working with volunteers. If you need a draft by a specific date, consider setting a deadline for your author several weeks in advance of when you really need the draft. Many authors request an extension or just miss the initial deadline due to unforeseen circumstances, so give yourself a buffer just in case. Be
understanding about delays and always show your appreciation for your authors’ and editors’ efforts.

2. Develop a Content Calendar

You may want to develop a content calendar for the year. It helps organize ideas and track follow-up. It also provides a big picture overview of goals for the year and allows you to easily see what has been accomplished.

3. Be Respectful of the AHLA Staff

Be respectful of AHLA staff time and make sure to recognize their efforts on your Group’s behalf. Give your staff liaison and the AHLA Publishing staff team plenty of lead time on a publication, especially longer publications. Make sure that you have copyright and publication release forms obtained for all of your publications and authors when you submit the draft to AHLA for final review. Finally, post publication feedback about the entire process and the success of your efforts is always appreciated.

F. How Should You Coordinate with AGs?

Many PGs sponsor AGs, which can be a great source for special interest or specialized expertise publications. PG and AG leaders should consider scheduling a call twice a year to coordinate publication efforts and reduce redundancies (and/or ensure that a designated AG leader participates in the PG’s regular calls and reports on planned activities of the PG, including potential publication efforts under consideration and those that may already be underway). Additionally, PG Vice Chair of Publications may want to consider allowing the AG Vice Chair of Publications to spearhead one of your PG’s publications each year on a topic that would interest both groups. When searching for peer reviewers and editors, consider enlisting the help of your AG(s) to leverage specialized expertise in the AG(s) on those topics.

G. What about AHLA Connections Feature Articles?

AHLA Connections feature articles are assigned to each PG or TF about once every sixteen months. Allow plenty of lead time for authors working on these drafts as AHLA has a strict publication schedule to adhere to. With that in mind, choose your authors carefully so that you don’t run into issues with the deadlines. If you receive submissions for the Connections feature article that you do not use, consider whether the draft could be repurposed as an article for an upcoming newsletter, briefing, or email alert.

H. Website Resources

Information and resources for Vice Chairs of Publications are available on the publications resources webpage (www.healthlawyers.org/PGPublishingResources) of the PG, TF, and AG leader website. Those resources include:

- Contact information for all PG, TF, and AG Vice Chairs of Publications;
- Publications progress charts/schedules;
- AHLA Connections feature articles calendar;
- Publication guidance documents and copyright releases;
- Examples of several publication options;
- Publishing Department’s pipeline report for non-dues publications; and
• Other relevant information/resources added as needed.
VI. VICE CHAIRS OF EDUCATIONAL PROGRAMS

New Vice Chairs of Educational Programs will find much to do within the confines of their area of responsibility. This position has been called “the workhorse of the PGs.” There is much work to be done, but there are also great rewards. You have the opportunity to work with many AHLA colleagues who are experts in their fields as well as with other AHLA leaders. You also have the opportunity to learn a great deal about cutting-edge topics in your Group’s area.

Each task seems to lead to multiple factors to consider. As a result, this chapter is designed to provide a comprehensive roadmap for education planning, execution, and follow-up, as well as best practices for each step along the way. It is organized according to the responsibilities of Vice Chairs of Educational Programs as delineated by AHLA.

A. Getting Started and General Tips

If possible, the Chair of your Group should provide sufficient transition time between Vice Chair of Educational Programs appointments to allow the incoming Vice Chair of Educational Programs to “shadow” the outgoing Vice Chair of Educational Programs through at least one distance learning event. This allows the incoming leader to see the complete educational planning, implementation, and follow-up process in practice.

Coordination with your Group’s Chair from the beginning is essential. Discussions about the number and types of distance learning events (webinar, roundtable discussions, or educational calls), as well as scheduling throughout the program year, are critical to implementing an organized, systematic approach to the responsibilities of the Vice Chair of Educational Programs.

Organizational skills are also critical for Vice Chairs of Educational Programs. At the outset of the program year, and in collaboration with your Group’s Chair and other Vice Chairs, you must plan for the number of webinars you aspire to present in the program year, a process that should dovetail with the establishing your Group’s Annual Work Plan. Remember that there are limitations on the numbers of educational presentations, and the days/dates/times during which they can be presented, and plan accordingly to produce measured presentations throughout the year (understanding that “emerging/hot” topics should be handled with appropriate urgency, and will almost always be accommodated). It is recommended that the Vice Chair of Educational Programs communicate with the Distance Learning staff as soon as possible after appointment to understand AHLA’s process for reserving/calendaring time for distance learning. In addition, Section D below provides more in-depth guidance on this topic.

Many Vice Chairs of Educational Programs have the opportunity to work with LDP participants. The ability to delegate tasks to LDPs in your Group will be a great asset as you manage your Group’s educational programs. You may consider enlisting the LDP participant to coordinate at least one webinar on their own, with appropriate instruction, guidance, and oversight.

Vice Chairs of Educational Programs should consider co-sponsorship opportunities as a means of increasing educational opportunities for the Group’s members on cross-cutting issues. However, they should be prepared to actively participate in the planning of co-sponsored programs to ensure adequate coverage of issues. For example, the Post-Acute and Long Term Services (PALS) PG co-sponsored a webinar that addressed arbitration. Through coordination with the primary sponsors of the session, the PALS PG Vice Chair of Educational Programs was able to secure a speaker that would address issues associated with the use of arbitration agreements in the nursing facility environment. As a result, while co-sponsorship opportunities
can be an effective means of increasing the number of educational sessions available to your Group’s members, they still require planning and collaboration with the sponsoring Group’s Vice Chair of Educational Programs to bring true value to the membership.

B. Planning—Identification of Topics

AHLA’s document delineating the division of leadership tasks—accessible on the PG, TF, and AG leader website (www.healthlawyers.org/PGLeaders) under the “Policies & Procedures” tab—notes that the Vice Chairs of Educational Programs should identify topics for webinars, roundtable discussions, and educational and open membership calls in conjunction with the rest of the Group's leadership. Involving the Group's Chair and other Vice Chairs in the topic identification process is important because individual practitioners within the Group’s leadership often have diverse practice specialties and thus can suggest topics that the Vice Chair of Educational Programs would not have considered otherwise. It can also be used to promote a “theme” for the Group’s programming year.

Some sources for topic ideas include:

- Proposals Submitted for In-Person Programs—Each year, AHLA receives far more proposals for its in-person programs than it can select. Proposals not selected for the in-person programs often provide excellent sources for topic ideas because they generally deal with timely issues of relevance to the Group’s membership. In many cases, they can provide a ready source of speakers for a webinar or roundtable discussion. It is recommended that the Vice Chair of Educational Programs review past in-person and distance learning programs to minimize the possibility of topic saturation, unless there are major developments in the topic to be covered.

- Brochures for trade association conferences similarly can provide leads on topic selection by highlighting legal sessions of importance to the clients we serve.

- General media sources can provide leads on hot topics. These include news reports, trade publication features, law firm issue alerts, etc.

- Topics that appeal to more than one PG, AG, or TF allow for multiple Groups to participate as co-sponsors and can increase participation by AHLA members.

The type of educational programming being planned also helps drive topic selection. While webinars can accommodate the broadest array of topics, roundtable discussions, educational calls, open membership calls, and PG luncheon programs require attention to whether the topic lends itself to the particular format.

- Roundtable Discussions—While roundtable discussions are similar to webinars in that they incorporate PowerPoint presentations by one or more speakers, they are typically controlled by leadership of the sponsoring Group. Accordingly, they are most often used to promote a thematic approach to a given subject that is being pursued by the Group as a whole. Roundtable discussions are offered to members of the sponsoring PG(s), AG(s) or TF(s), as well as government, academician, public interest, solo practitioner, student, and retired members of AHLA at a nominal fee, and slightly higher registration rates to other AHLA members and non-members. They are typically 75 minutes in duration, and Continuing Legal Education (CLE) credits are usually not available.
• **Educational Calls**—Educational calls are designed to facilitate interactive discussion among the speaker and participants. During such calls, one to two presenters discuss or provide an update about a hot-button issue and then open the lines for a discussion/Q&A. As a result, the topic must be sufficiently timely and controversial so as to lend itself to an extended discussion. Educational calls are 60 minutes in duration and are typically sponsored by an AG or TF, though PGs are not prohibited from sponsoring them. Like roundtable discussions, educational calls do not offer CLE credits. The sessions are open only to members of the sponsoring PG, AG, and TF (and sponsoring PGs of that particular AG and/or TF).

• **Open Membership Calls**—Open membership calls are similar to educational calls in that they provide an opportunity for interactivity between the participant and presenter, but an added component is interaction with sponsoring Group’s leaders. These calls typically feature a more informal discussion topic that is addressed by one presenter (from 15-30 minutes), and a short Q&A session. The second part of the call is devoted to reports from Group’s leadership about projects and activities that the Group is undertaking or plans to undertake, and provides an opportunity to solicit volunteers for specific projects, feedback on the Group’s work, and ideas for future activities. Open membership calls are 60 minutes in duration and may be sponsored by a PG, TF, or AG, and are open only to members of the sponsoring PG, AG, and TF (and sponsoring PGs of that particular AG and/or TF). No CLE credits are offered for participation.

• **PG Luncheons**—PG luncheons are held in conjunction with an in-person specialty program for the PG and the AHLA Annual Meeting. TF and AG leaders should work with leaders from their sponsoring PGs, if they have suggestions for luncheon topics and/or speakers. Topics that are most appropriate for these programs typically involve an in-depth discussion of a singular event or case by those who were involved in it. Examples include a discussion by the parties of the strategies that went into a successful defense to a False Claims Act case and the emergency response by a nursing home provider to destruction occasioned by Hurricane Katrina in 2005. Also effective topics for PG luncheons are panels including government lawyers and private practitioners discussing regulatory and enforcement trends, and narratives from inside the Beltway about how certain hot-button legislation came to pass.

Although AHLA is able to offer some reimbursement of expenses for government speakers, luncheon speakers from the private sector are typically not provided with reimbursement for airfare or lodging. All luncheon speakers are able to attend sessions on the day of the lunch at which they are speaking. Some complimentary and discounted registration fees are available for government speakers who would like to attend the entire conference, however, complimentary registration is not provided for private practitioners who attend the full program.

The Vice Chair of Educational Programs should consider the location of the event in choosing a topic and try to find a local expert to speak or to choose a topic that has broad appeal to members, but is rooted in the particular location. It is prudent for the Vice Chair of Educational Programs to reach out to membership in the state or city where an event is to be held early in the planning process to help inform themselves of engaging topics and speakers local to the area. As noted elsewhere, proposals that are not selected can serve as a good source for potential topics and speakers for the luncheons. AHLA, however, has a policy of having no more than two people from a particular firm or organization speak at an in-person program (exceptions are made for
government agencies) and no more than one person from a firm or organization on a particular presentation. This applies to luncheons and breakfasts as well as to sessions so the PG leaders must consider firm representation when suggesting speakers for the luncheons. Because the lunches are a component of an in-person program, Programs Department staff will work with PG leaders to coordinate the scheduling of luncheons as well as the marketing for these events and the logistical arrangements.

PG luncheons are frequently sponsored by vendors/consulting firms. The sponsorship helps offset speaker and audio visual expenses. The sponsoring company is allowed to distribute materials to the luncheon attendees and is given an opportunity to have a representative make brief welcoming remarks at the luncheons.

It is important that the PG leadership be represented at the program at which their PG is holding a luncheon and, of course, at the luncheon itself. All PG leaders, not just the Vice Chair of Educational Programs, are encouraged to attend and take advantage of the opportunity to network with current and potential PG members. Absent extraordinarily extenuating circumstances, the PG Chair should always be present at the PG luncheons.

- **Webinars/Multi-Part Webinar Series**—Webinars are typically 90-minute-long, live web-based seminars planned and executed by PGs, TFs, and/or AGs. A presentation is followed by a Q&A session in which questions are submitted electronically to the presenters, and the presenters answer them in real time during the event. Many Groups have elected to sponsor a series of educational programs, which consist of a several webinars (or a combination of webinars and roundtable discussions) involving various aspects of a single practice area, e.g., compliance throughout the long term care continuum. When selecting a topic for a multi-part series, care must be taken to choose a topic that lends itself to multiple installments. One strategy involves starting out with an introductory session about a given area of law and increasing the level of sophistication with each successive installment. Another strategy involves focusing on different facets of the topic for each installment. In either case, great care must be taken to make sure that the content of the installments is not duplicative. Planning for a multi-part webinar series is very much frontloaded and involves management of multiple sub-topics, speakers, and calendar reservations. Every aspect of the series must be in place before AHLA can begin to market it to members. As a result, the Vice Chairs of Educational Programs should leave sufficient time for the extensive planning required to produce the program.

While sessions that are geared to an academic exploration of one or more legal issues have their place in AHLA’s educational programming, PG, AG, and TF members are largely private practitioners dealing with clients who face significant legal hurdles. As a result, educational programs should focus specifically on the practical implications of legal issues and provide participants with specific recommendations for dealing with the issue(s) where possible.

### C. Planning—Selection of Speakers

Selection of speakers is often the most difficult aspect of the educational planning process. A good speaker can engage the audience and create a robust learning environment regardless of the medium. A poor speaker, however, can make even the best content unpalatable to participants. In choosing speakers, it is critical for the Vice Chairs of Educational Programs to use experience as a guide whenever possible to select individuals that are knowledgeable
about the subject matter, reliable, and, most of all, are skilled engaging presenters. Even the most expert subject matter can be perceived by the audience as valueless if it is not presented well.

It is advisable for the Vice Chair of Educational Programs to compile a list of potential speakers by topic and to keep it updated throughout their tenure. Talented speakers can come from a variety of sources:

- **Past AHLA Programs**—If available, the Vice Chair of Educational Programs should review the proposed speaker’s past evaluation scores to determine whether the speaker would be a good candidate for the particular session being planned. One of the largest audience dissatisfiers is a speaker who, while knowledgeable, presents by reading all (or nearly all) of their slides. Speakers should be reminded that their oral content should complement their slides, and not merely repeat the information contained in them.

- **Other Association Speakers**—Conference brochures and distance learning program descriptions from other associations in the same field are available online and are often good sources for speakers. It may be necessary to determine the speaker’s proficiency through listening to an audio clip of the speaker or reaching out to colleagues who have listened to the speaker.

- **Colleagues**—Colleagues are an excellent source of speakers or recommendations for speakers. Personal knowledge of colleagues’ practice expertise and skills as a speaker can provide a high degree of confidence about their commitment to the program and their ultimate performance as a speaker. However, Vice Chairs of Educational Programs should not have more than one speaker from any one law firm, consulting firm or other organization.

- **Recommendations from PG, AG and/or TF Leaders**—Similar to receiving recommendations from colleagues, a Group’s Chair and other Vice Chairs will often have personal knowledge of speakers who are well-suited to a particular topic. The same can be said of leadership from other Groups that may be co-sponsoring the session, especially with respect to speakers who can address the matters of interest to the co-sponsoring Groups.

- **“Eager Beavers”**—Newcomers and those seeking to become more involved in your Group’s activities often volunteer themselves to speak. While such volunteers may not always be proven speakers, they certainly have the motivation to commit themselves to presenting an educational program and serve to diversify the speaker pool. A good way to identify and involve new talent is by balancing the newcomer with experienced presenters.

- **AHLA Publications**—AHLA has a wide variety of books, newsletters, briefings, and other written educational material. There are many authors associated with these materials who also make excellent speakers.

Where the program being planned involves a panel presentation, the Vice Chair of Educational Programs must use care to make sure that the speakers selected complement each other in terms of content expertise and represent a variety of perspectives. Given the time constraints of most distance learning vehicles, a maximum of three speakers is recommended. Please make sure to consider members from the various underrepresented constituencies when selecting
speakers/panels, consistent with AHLA’s commitment to diversity and inclusion in our membership.

D. Planning—Managing the Calendar and Speaker Preparation

Keeping ahead of the calendar is the biggest challenge in planning successful distance learning programs. With 16 PGs, four Task Forces, and several AGs planning webinars, roundtable discussions, educational calls, and open membership calls, AHLA’s calendar fills up very quickly. It is, therefore, essential for Vice Chairs of Educational Programs to schedule their programming months in advance in order to reserve a favorable time slot. The lead time requirements for reserving a date are:

- **Webinar series**: 75 days in advance
- **Webinars of general interest**: 75 days in advance
- **Webinars on hot topics/late-breaking issues**: 45 days in advance
- **Roundtables**: no later than 45 days in advance
- **Educational calls**: no later than 45 days in advance
- **Open membership calls**: no later than 45 days in advance

Once the topic and format have been selected and a time slot has been reserved, the Vice Chair of Educational Programs must then provide information for marketing the program to the AHLA. The required marketing elements include a formal title, the details of the content, and the confirmed speakers. Depending on the format of the program, this information should be submitted to AHLA according to the following timeline, before the program is scheduled to occur so that it can be marketed to members. It is important to adhere to the deadlines in order to allow for the marketing of distance learning events to be effective.

- **Bootcamps and webinar series**: 60 days in advance
- **Webinars of general interest**: 60 days in advance
- **Webinars on hot topics/late-breaking issues**: 30 days in advance
- **Roundtables**: 30 days in advance
- **Educational calls**: 30 days in advance
- **Open Membership calls**: 30 days in advance

Final materials from the presenter(s) are required to be submitted to AHLA a minimum of two business days before the date on which the program is scheduled to occur. This is because AHLA must reformat the presentations to include certain standard templates and information. The final product is then posted for access by everyone who registered for the program. AHLA staff arranges for a practice call to run through the webinar platform and the basic flow of the program one business day before the webinar or at a time most convenient for the presenters.

As a result of the foregoing, there is often a significant lag time between speaker selection and the actual presentation of the program. Because speakers are volunteers and are often beset with unanticipated workload challenges in their practice, it becomes critical for the Vice Chair of Educational Programs to communicate with the speaker periodically to ensure that the speaker is committed to the program, understands the goals for the session, and is working to meet required deadlines for producing content. Otherwise, the Vice Chair of Educational Programs may be put in the position of having to reschedule the session or scramble to find another speaker on short notice, neither of which is particularly easy to do. Recommendations for keeping speakers on track include the following:
• **Meeting Requests**—The Vice Chair of Educational Programs should send out electronic meeting requests for brief check-in calls to ensure that everything remains on track. Also, while AHLA will send out their own electronic meeting requests as the scheduled date for the distance learning event draws closer, it's important to get the deadline for submission of materials and the event date on the speaker's calendar from the beginning even if just a placeholder. This practice has the added benefit of keeping the Vice Chair of Educational Programs ahead of the calendar as well!

• **Add Some Cushion to Deadline for Submitting Materials**—As noted above, AHLA requires the PowerPoint slides to be submitted two business days prior to the scheduled date of the distance learning event. While such a deadline is generous to the speakers, it does not afford the Vice Chair of Educational Programs sufficient time to review and assess the materials for their appropriateness and scope. It, therefore, is recommended that Vice Chairs of Educational Programs work with their speaker(s) to obtain the slides and other materials a week in advance. That leaves sufficient time for the speaker(s) to make changes, if necessary.

• **Backup Plan**—If possible, it is a good idea to have a backup speaker in mind for a distance learning event if the committed speaker is unable to proceed. This becomes very difficult to do if the committed speaker backs out close in time to the scheduled date of the event. Keeping the lines of communication with the committed speaker open throughout the planning process helps minimize this problem.

E. During and After the Event

Although the heavy lifting of educational programming is complete when the scheduled date for the event arrives, there is still important work to be done by the Vice Chair of Educational Programs.

• **Moderator Selection**—While it certainly isn’t critical or even possible for the Vice Chair of Educational Programs to serve as the moderator for every webinar, roundtable discussion, and educational call, it does provide him/her with an excellent opportunity to assess the effectiveness of the speaker(s) and the distance learning event itself. If also affords an opportunity to engage the speaker(s) in targeted discussions during the Q&A period. If the Vice Chair of Educational Programs cannot serve as the moderator, it is beneficial to find a moderator that has a working knowledge of the topic and can, if necessary, formulate additional questions for the speaker(s) if the prepared questions have been exhausted and no questions are forthcoming from the audience. Moderating is a skill, and a moderator should be interested in serving in that role, and ideally, experienced in panel moderation (where applicable). If the proffered moderator doesn’t have the expertise necessary to serve well, it is a good idea to seek out an experienced AHLA moderator to provide some mentorship/knowledge transfer. A member of the AHLA’s staff will be able to identify members who have successfully moderated in the past, should this type of mentoring be needed.

• **Practice Calls**—Especially if speaker(s) are unfamiliar with AHLA’s distance learning platform, practice calls with the speakers, the moderator, the Vice Chair of Educational Programs, and AHLA staff are very important. The calls don’t have to be long, but are critical to familiarizing participants with the technological infrastructure for the program,
as well as the flow of the presentations if there is more than one speaker. The current “AHLA Practice Group Distance Learning Event Planning and Implementation Process” guidance (available at www.healthlawyers.org/PGLeaders under the Policies & Procedures tab under “Distance Learning”) specify that AHLA staff will schedule a practice call one business day prior to the program or at a time most convenient for the presenters/moderator.

- **Canned Questions**—Preparing three to four questions in advance of the session that build on the materials in the speaker’s presentation is critical to keeping the program moving when it transitions from lecture mode to Q&A mode. Webinar participants are often frustratingly slow in asking their own questions. Canned questions, however, can stimulate discussion among the participants and lead to follow up questions from the audience. They are also an excellent means of discussing the practical implications of the materials being presented. All canned questions should be shared with the speaker(s) in advance.

- **Read and Analyze Program Evaluations**—Once the distance learning event has concluded, AHLA staff will email an evaluation survey to everyone who registered for the event. The evaluations measure various aspects of the subject matter and presentation. Accordingly, they can be very helpful to Vice Chairs of Educational Programs in assessing the value to the membership and for making changes going forward, particularly in cases involving a series of related webinars such as multipart series.

- **Consult with Other Vice Chairs of Educational Programs**—There are several opportunities throughout the programming year for Vice Chairs of Educational Programs to share their experiences. AHLA schedules regular conference calls for Vice Chairs of Educational Programs to discuss Association initiatives and trends related to educational programming. They also present leaders with an opportunity to share any concerns they may have as well as best practices for various aspects of their responsibilities. More importantly, in conjunction with AHLA’s Annual Meeting, the Association conducts a Leadership Training program for new and returning PG, AG and TF leaders. The meeting includes a breakout session for Vice Chairs of Educational Programs that is very helpful in terms of allowing leaders assigned to this role to meet each other, share ideas, and delve into the finer points of serving AHLA as a Vice Chair of Educational Programs.

- **Coordinate with the Social Media Coordinator**. It is strongly recommended that you coordinate with your Group’s Social Media Coordinator to publicize upcoming distance learning events on Twitter, LinkedIn, and AHLA Communities. These publicity opportunities can include:
  - Providing marketing materials early in the process for promotion on social media platforms;
  - Coordinating live tweeting or providing “canned” tweets in advance for the Social Media Coordinator to release on Twitter. You can ask your speakers to provide tweets for this purpose;
  - Providing copies of PowerPoint slides to the Social Media Coordinator for release, as providing images in addition to text provides variety that makes the content more interesting and engaging for followers.
F. Conclusion

There is no secret to planning a successful distance learning event. It merely takes time, effort, and above all, organization. Vice Chairs of Educational Programs who understand that from the beginning and take control of the calendar before it controls them will find their service as a Vice Chair of Educational Programs to be a very rewarding and productive endeavor.

G. Website Resources

Information and resources for Vice Chairs of Educational Programs are available on the educational programs resources webpage (www.healthlawyers.org/PGEducationResources) of the PG, TF, and AG leader website. Those resources include:

- Contact information for all PG, AG, and TF Vice Chairs of Educational Programs and relevant AHLA Committees;
- Distance learning event planning and implementation process guidance/webinar best practices, PowerPoint templates, and speaking training tool;
- “Leadership Excellence” webinar series materials and recordings; and
- Other relevant information/resources added as needed.
VII. VICE CHAIRS OF RESEARCH AND WEBSITE

The responsibilities of the Vice Chairs of Research and Website may vary slightly from PG to PG, and many of them share the role of developing PG resources with their counterpart, the VCs of Publications. Generally, the VCs of Research and Website focus on online resources, including toolkits, tutorials, and podcasts. In FY 2018, AHLA’s Publishing staff will also be working with all of these leaders to create Topical Libraries for their respective PGs.

A. PG Topical Libraries

These are new resources in FY 2018, made up of a collection of current AHLA content from all sources, posted on a single webpage where members can easily view all the most relevant and recent resources relating to their respective practice area. Links to the most recent PG resources would also be available on this page. Staff will work closely with an Editor-in-Chief (designated by the Vice Chair of Research and Website) from each PG to launch these libraries in FY 2018 and update/refresh the content offerings every 6 months. We will launch 16 topical libraries, one for each PG, by the end of the fiscal year.

More information about the structure and process for developing these topical libraries will be made available. Based on the enthusiastic response received from PG leaders about the value of this resource, it is clear that launching and maintaining these libraries will be a critical part of the responsibilities of this leadership position.

B. PG Alerts

The Vice Chairs of Research and Website may be assigned the responsibility for production of alerts. Such responsibility is determined by the Group’s Chair at the beginning of the program year and may be assigned to either the Vice Chair of Publications or Vice Chair of Research and Website. As defined in chapter V of this Guide, alerts are short 1,000 words or less, summaries of breaking news covering topics not already covered in AHLA current awareness resources. Topic approval by staff is required. For guidance related to alert production, please refer to the resources webpage for Vice Chairs of Research and Website, accessible at www.healthlawyers.org/PGRResearchResources.

C. Toolkits

The Vice Chairs of Research and Website are typically responsible for coordinating the publication of toolkits on their respective Group’s website. Toolkits are a collection of resources and information on selected health care topics that fall within a Group’s jurisdiction, and are accessible online to members of the sponsoring PG, AG, or TF. The current formal definition of “Toolkit” (found at www.healthlawyers.org/PGRResearchResources) is “an online collection of resources and information on a particular health law topic. The resources and information are primarily original AHLA content.”

As of FY 2018, Toolkits will co-exist with PG topical libraries as introduced above. The topical libraries will fill the need for a single webpage where members can access all current AHLA content relevant to that practice area; Toolkits will focus on discrete topics, state law survey, forms and practice tools. Links to a PG’s toolkit(s) will be posted on the topical library page, to provide a one-stop shopping experience for members.
The initial step for leaders is to generate ideas for toolkits. At the Group’s first regular conference call of the new AHLA program year, leadership should take time to brainstorm about potential new toolkits that the Group may want to develop during that year. If feasible, the Group should consider setting a goal of adopting one new toolkit, and updating at least one existing toolkit, during any given program year. One way to generate ideas for possible toolkits is to review the curriculums for AHLA in-person meetings and determine whether any of the educational topics covered would translate to a good toolkit.

Production of a quality toolkit requires dedicated volunteers. Toolkits take much more time to develop and refine than smaller projects such as alerts. Soliciting dedicated volunteers to work on a toolkit is similar to the process for soliciting authors as otherwise explained in this chapter. The Vice Chair of Research and Website may also want to identify experts in the area to be addressed by the toolkit to serve as volunteers and potentially oversee the construction of the toolkit. These experts may be identified by members of your Group or may be listed as speakers on educational topics presented at in-person AHLA meetings and distance learning events.

The next step in the toolkit process is for the Vice Chair of Research and Website to monitor the volunteer effort as it relates to the actual toolkit construction. Consider selecting one of the toolkit volunteers to coordinate and supervise the toolkit’s development, as opposed to taking on this role yourself—the Vice Chair of Research and Website does not have to serve as the toolkit supervisor, but may do so if none of the volunteers are willing to accept this role.

The Vice Chair of Research and Website and the toolkit supervisor, if one is appointed, should hold an organizational call to discuss the parameters of the toolkit and the best way to make use of toolkit volunteers. If you determine that you have more volunteers than necessary, select the most qualified volunteers to do the work. If you do not utilize all of the volunteers who responded to the request to participate on the toolkit, you are encouraged to send them a “thank you” email for volunteering and let them know about other opportunities for involvement in the Group.

Once the toolkit work group is identified, the Vice Chair of Research and Website and toolkit supervisor should hold an initial organizational call and distribute an agenda for the meeting before it’s held. To ensure that volunteers are invested in the process, you should ask them to provide suggestions, comments, or changes on the topic areas that the toolkit is to address. The Vice Chair of Research and Website and toolkit supervisor should then assign topic areas to the volunteers and set a definitive deadline for completion of the assignments. It is helpful to coordinate access to an existing toolkit(s) for the volunteers, so they may review format(s) and structure(s) used in previous toolkits for purposes of drafting their chapters and subsequent layout of content.

Toolkits must include original, secondary source content and may also include a selection of links to key public domain documents. Toolkit volunteers should provide reliable confirmed links to the documents and/or PDFs of the documents. They should also be aware of any intellectual property issues that are implicated in distributing content and provide all relevant permissions if the copyright is held by an outside source. It is important to monitor your volunteers’ progress on the toolkit to ensure you meet your publication deadline. This can be done by communicating with them on a regular basis, sending reminders, and/or scheduling periodic status update conference calls. Expectations for the project, deadlines, and follow-up format/style should be outlined during the initial organizational call.
Upon completion of the initial draft of the toolkit, the draft should be distributed to volunteers who have agreed to serve as editors. Depending on the size and scope of your Toolkit, you may need several volunteers to serve as editors to complete the editing process. Editors should attempt to format the drafted chapters of the Toolkit in a similar fashion so that the Toolkit has consistency and uniformity. It is important to set a definitive deadline for your editors to complete the review process.

The Vice Chair of Research and Website should regularly report on the status of the toolkit to the AHLA staff responsible for coordinating toolkit publication on the website. Make sure to inform staff about any changes to deadlines.

In order for your Group to get the most exposure for the toolkit, and for your members to get the most use out of the toolkit, you should recommend and support efforts to promote the publication. The Group should consider choosing a toolkit publication date that is tied to an AHLA in-person meeting, specifically, where your Group sponsors a luncheon, so that you may announce and highlight your toolkit as an additional, excellent resource for your members. The Marketing, Communications and Business Development staff may also have some ideas on how to regularly remind PG members that they have access to one or more toolkits, as part of a broader strategy to market the specific benefits of PG membership. More generally, Vice Chairs are encouraged to collaborate with staff to spell out the value of specific PG resources, and to help promote them effectively by designing a meaningful marketing message.

As always, you should take time to thank your toolkit volunteers for their participation in constructing or updating the toolkit. Failure to appropriately recognize volunteers is the best way to lose volunteer participation.

C. Tutorials and Podcasts

**IMPORTANT NOTE:** In FY 2018, AHLA will be investigating new e-learning software in order to offer a more up-to-date format for producing this type of content. Staff will be exploring different software packages, and training to use the new software and implement instructional design principles. The development of new tutorials is currently on hold, but will be re-activated later in the fiscal year. Staff will be communicating with the Vice Chairs of Research and Website on a regular basis, and will update you on their progress in this area as needed.

Tutorials and podcasts are another vehicle to deliver educational content to your Group’s members. Tutorials are pre-recorded, brief audio lessons, approximately 30-45 minutes in length, on a topic of interest pertaining to PG your Group’s members. Tutorials are typically overviews or fundamental reviews of broad topics, but may be more narrow in scope (depending on the topic to be covered), and typically feature up to three speakers with expertise in the subject matter.

D. Website Organization and Content

The Vice Chair of Research and Website should periodically review the Group’s website, including, for PGs, the webpages/content of any AG or TF tied to the PG, to ensure that the content is still relevant, identify content that should be added, and flag any items that should be updated or removed.
More specifically, it is important to test the links on the website on a regular basis as hyperlinks may stop working over time, especially those that are directed to resources/content on other websites (not housed on the AHLA website).

E. Conclusion

There is no right or wrong way for Vice Chairs of Research and Website to perform their tasks and responsibilities for their respective Groups. Vice Chairs who dedicate enough time to accomplish their tasks, and who have the “buy in” from their volunteers, will produce quality educational content to be distributed to their members. However, the best practices outlined in this chapter may help you be more efficient and organized in handling your responsibilities in your role as Vice Chair of Research and Website.

F. Website Resources

Information and resources for Vice Chairs of Research and Website are available on the research and website resources webpage (www.healthlawyers.org/PGResearchResources) of the PG, TF, and AG leader website. Those resources include:

- Contact information for all PG, AG, and TF Vice Chairs of Research and Website;
- Toolkit and document library information/guidelines and samples;
- Tutorial and podcast instructions, basics, and examples; and
- Other relevant information/resources added as needed.
VIII. VICE CHAIRS OF STRATEGIC PLANNING AND SPECIAL PROJECTS

A. Introduction

Strategic Planning and Special Projects is the newest PG/TF/AG Vice Chair position. The primary role of the Vice Chair of Strategic Planning and Special Projects is to help create, document, and monitor the PGTF/AG’s “Annual Work Plan.” AHLA already uses the name “strategic plan” to refer to the master Association Strategic Plan, so in the context of PGs/TFs/AGs, the name “Annual Work Plan” was selected instead. The PG’s Annual Work Plan is intended to be similar to a strategic plan. The Annual Work Plan informs the work of the Chair and each of the other Vice Chairs. In this role, the Vice Chair of Strategic Planning and Special Projects serves as the keeper of the PG/TF/AG’s “institutional memory” and also prevents the PG/TF/AG leadership from “reinventing the wheel” by keeping the PG/TF/AG focused on the Annual Work Plan throughout the year. The remainder of the Vice Chair of Strategic Planning and Special Projects’ duties are secondary to the Annual Work Plan process, and can be as varied as the duties performed by the Chair and/or the Vice Chair. The flexibility inherent in this position allows the leaders of a PG/TF/AG to define the other tasks of the Vice Chair of Strategic Planning and Special Projects based on the PG/TF/AG’s needs and priorities.

B. Primary Responsibility—the Annual Work Plan

The Vice Chair of Strategic Planning and Special Projects’ primary job function is to manage the PG/TF/AG’s development, publication, monitoring, and fulfillment of the Annual Work Plan. This strategic planning focus was added to the job description in 2015, and further standardized across all PGs/TFs/AGs in 2017, in order to ensure that each Group engages in project planning on a regular and consistent basis, and reports progress to the Board in a timely and consistent manner. Previously, several PGs incorporated strategic planning roles but strategic planning was not adopted by the PGs/TFs/AGs on a consistent basis. Further, timing and documentation varied, making efficient Board oversight challenging.

As of 2017, all PGs/TFs/AGs are required to maintain an Annual Work Plan and follow the Annual Work Plan process described below.

1. Timing of Annual Work Plan Process:

   a. Planning and Development Phase (prior to first PG/TF/AG Call)

      i. April/May/June – transition period for leadership;
      ii. At or before Annual Meeting – Outgoing/Incoming Vice Chairs of Strategic Planning and Special Projects confer to transfer reigns of Annual Work Plan process;
      iii. At the Annual Meeting (or shortly thereafter—first two to three weeks after) - Incoming Vice Chair of Strategic Planning and Special Projects circulates prior Annual Work Plan to all Vice Chairs in the PG/TF/AG, and solicits updates, modifications, and new strategy suggestions;

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17 As noted in the Chapter III, for any PG/TF/AG that has no Vice Chair of Strategic Planning and Special Projects, the responsibility of the Annual Work Plan falls to the Chair of that PG/TF/AG, adding to the Chair’s many other responsibilities. Thus, AHLA encourages any such PGs/TFs/AGs to consider whether to add a Vice Chair of Strategic Planning and Special Projects role, if possible, to alleviate that burden.
iv. Before first PG/TF/AG leadership call – Vice Chair of Strategic Planning and Special Projects receives back and processes all updates and suggestions to Annual Work Plan, circulates new draft to leadership for final comment ahead of leadership call.

b. Completion and Submission Phase (key deadline - September 15)

i. 1st PG/TF/AG call (should be held no later than August 31):
   1. The Annual Work Plan should be a key agenda item on the first leadership call, and not delayed to future calls;
   2. On the first leadership call, Vice Chairs hold any discussion regarding the content of the Annual Work Plan, as warranted (with all Vice Chairs given the opportunity to comment or suggest improvements, etc.);
   3. If the Annual Work Plan is completed and ready to submit before the 1st leadership call, that is perfectly fine.

ii. Within 7-10 days after first leadership call, but no later than September 15:
   1. Vice Chairs of Strategic Planning and Special Projects updates and finalizes the Annual Work Plan based on discussion and final comments;
   2. Chair or Vice Chair of Strategic Planning and Special Projects forwards the Annual Work Plan to PG Board Committee liaison for their review and then to AHLA staff for submission to the PG Board Committee for its review.

c. Tracking and Update Phase (remainder of Program Year)

i. Throughout the remainder of the program year:
   1. Vice Chair of Strategic Planning and Special Project tracks progress of goals, fields any issues, or requests for changes to the Annual Work Plan.

ii. On remaining leadership calls, the Annual Work Plan is a standing agenda item, where:
   1. Vice Chair of Strategic Planning and Special Projects reports progress to date on accomplishing Annual Work Plan goals;
   2. All Vice Chairs can discuss any issues or changes that become necessary during the program year.

iii. Mid-Year and Annual written Reports to Board:
   1. Vice Chair of Strategic Planning and Special Projects, as part of their section of the written reports to the Board, provides a written narrative reporting actual performance compared against Annual Work Plan goals and objectives;
   2. Other Vice Chairs may be asked to comment on progress of particular Annual Work Plan goals/tasks that are specific to their area of responsibility.

2. Format and Content of Annual Work Plan:

   a. Annual Work Plan – Standard Format for Documentation
i. Purpose of the standard format for documentation of the Annual Work Plan is to help the Board with the review process. There are 40 PGs/TFs/AGs that will generate Annual Work Plans, and a standardized format is needed to ensure the Board can review them all efficiently and effectively.

ii. Annual Work Plans will be documented using a PowerPoint slide format with separate slides for each separate objective with the following bullets:
   1. **Objective** – description of the goal or objective
   2. **Goal** – numerical description of objective (if applicable, or can be combined with Objective bullet, as appropriate)
   3. **Strategies** – how the objective will be accomplished
   4. **Measures** – numerical measure that will indicate success

iii. Example Slide:

   **Annual Workplan – Objective #1 - Membership**
   - **Objective #1**: Increase PG Membership
   - **Goals**: 25% increase during program year
   - **Strategies to achieve goal**:
     - Hold series of targeted educational activities open to all of AHLA
       - Offer membership to attendees who are not already members
     - Identify recently departed members and reach out to them to determine if they would like to rejoin PG
   - **Measures**: % increase in membership tracked regularly (at least every 2 months)

iv. More detailed examples of the Annual Work Plan format are available on the Vice Chairs of Strategic Planning and Special Projects resources webpage referenced at the end of this chapter.

**b. Annual Work Plan – Content (vision and specific goals and measures)**

The Vice Chair of Strategic Planning and Special Projects’ primary function is to oversee the development and implementation of the Annual Work Plan to memorialize their PG/TF/AG’s goals for the program year, working collaboratively with the Chair and the other PG/TF/AG Vice Chairs. The responsibility for each goal's accomplishment is assigned by the Chair to individual Vice Chairs.

i. Vision for the PG/TF/AG:
   1. The concept of vision is discussed at length in the chapter covering the Chair role (chapter III). The PG/TF/AG vision is the responsibility of the Chair, with substantial development input from entire leadership group (all Vice Chairs), and should generally represent a “compelling image of an achievable future;” PG/TF/AG leaders may wish to state the vision at the beginning of the Annual Work Plan.
   2. The PG/TF/AG vision generally requires some level of buy-in from all Vice Chairs to be successful.
ii. Specific objectives and measures:

1. The Annual Work Plan should include substantial goals that:
   a. Require coordination or a significant commitment of time and/or resources;
   b. Are calculated to increase the satisfaction of the PG/TF/AG’s membership, serve underserved constituencies in the PG/TF/AG, and benefit AHLA overall; and
   c. Must be consistent with AHLA’s mission and vision statements.
   d. Should be discrete, and should not include the general tasks or duties that the Vice Chairs are already expected to undertake independently.

2. Individual objectives will vary
   a. Some will be simple; others more involved
   b. Some can be PG/TF/AG-wide; others specific to certain Vice Chair roles
   c. Individual Objectives do not need to be profound paradigm shifts, but do need to comport with the PG/TF/AG vision

3. Some will last beyond the program year, or may take longer than one program year to accomplish—that is perfectly fine.

4. Falling short on some goals is okay - obviously, everyone wants to be successful, but it is fine for some goals to be ambitious as well.

3. Role of Vice Chairs of Strategic Planning and Special Projects

The Vice Chair of Strategic Planning and Special Projects should do the following to help ensure the PG/TF/AG goals are appropriately established and accomplished during the program year:

1. Communicate with other PG/TF/AG leaders to track issues and events that recur over the course of several years to coordinate continuous, consistent coverage and project management for ongoing issues.

2. Review and evaluate the past year’s PG/TF/AG and project resource allocation to identify trends and to track areas, topics, and opportunities that both attract the most member attention and that require the greatest resources in order to anticipate likely resource needs for the upcoming year.

3. Throughout the year, in cooperation with the Chair and Vice Chairs, develop and/or assist with special projects and activities relating to topics of interest to the AHLA membership that are not the subject of other special projects or initiatives, which are substantial enough to be added to the Annual Work Plan for the remainder of the year, and coordinate such projects or help PG/TF/AG leaders identify the coordinator for such projects.

4. Assist the Vice Chairs who may be experiencing difficulty achieving progress to help ensure that their assigned goals remain reasonably attainable.

5. When necessary, re-evaluate whether the goals can or should be accomplished as initially conceived and modify the Annual Work Plan accordingly. Report material changes to the Chair.

6. Prepare a summary of the challenges faced by the PG/TF/AG in achieving the Annual Work Plan goals, and the tools/techniques utilized to meet those challenges,
and share the summary with the PG/TF/AG leadership and the Vice Chair of Strategic Planning and Special Projects’ working group.

C. Other Responsibilities

Other than the management of the PG/TF/AG’s Annual Work Plan (an extraordinarily important task), roles of Vice Chairs of Strategic Planning and Special Projects can vary substantially. The “Sample Division of AHLA Practice Group Leadership Tasks”—accessible on the PG, TF, and AG leader website under the Policies & Procedures tab (www.healthlawyers.org/PGLeaders) encourages PG/TF/AG Chairs to obtain the input of the Vice Chairs to identify matters requiring extended time and effort for assignment to the Vice Chair of Strategic Planning and Special Projects. The above mentioned document also recognizes the Vice Chair of Strategic Planning and Special Projects’ role as extending to matters such as assisting on projects and activities falling outside the scope of the other Vice Chair responsibilities or demanding the attention of multiple Vice Chairs, and provides examples of various responsibilities that can be assigned to a Vice Chair of Strategic Planning and Special Projects.

In line with this flexibility, Vice Chairs of Strategic Planning and Special Projects may assume a wide variety of roles, including:

- Coordinating or assisting with special or long-term projects, such as toolkits and webinar multi-part series;
- Serving as a resource for the Chair and Vice Chairs of the PG/TF/AG and its affiliated entities (such as AGs or TFs, in the case of PGs);
- Interfacing in a liaison role with affiliated TFs and AGs;
- Pursuing strategic partnership opportunities involving TFs, AGs, and other PGs or outside organizations;
- Mentoring activities with PG Leaders and Leadership Development Program (LDP) participants;
- Coordinating the PG’s LDP or similar programs;
- Surveying the PG/TF/AG’s members and identifying needs that are underserved;
- Preparing PG/TF/AG reports; and
- Coordinating luncheon or webinar programs.

Most of the responsibilities commonly assumed by Vice Chairs of Strategic Planning and Special Projects overlap to at least some extent with responsibilities of other Vice Chairs. These roles are discussed in other chapters of this guide. Collaboration and strategic partnerships are discussed below in this chapter.

D. Customizing the Strategic Planning and Special Projects Vice Chair Role

The varied portfolio of tasks that may be assumed by a Vice Chair of Strategic Planning and Special Projects creates challenges as well as opportunities. The flexible nature of this Vice Chair role offers the opportunity to tailor the position to advance the objectives of the PG/TF/AG and to pursue initiatives and create synergies that may otherwise be out of reach. However, without sufficient forethought, the Vice Chair of Strategic Planning and Special Projects can feel (and be) underutilized.

Various factors come into play in determining the roles of the Vice Chairs of Strategic Planning and Special Projects and how responsibilities are shared among the Vice Chairs. Issues of
particular relevance include the purview of the PG/TF/AG and the focus, priorities, unmet needs, and Annual Work Plan of the PG/TF/AG as well as the interests and time commitments of the PG/TF/AG’s Vice Chairs. Of course, the Vice Chair of Strategic Planning and Special Projects’ role as steward of the PG/TF/AG’s Annual Work Plan remains of primary importance.

Planning, creativity, coordination, and communication within the PG/TF/AG leadership group are essential for customizing the Vice Chair responsibilities to provide a clear purpose and vital role for the Vice Chair of Strategic Planning and Special Projects. It is crucial for the Chair and all Vice Chairs of the PG/TF/AG to discuss, coordinate, and plan for the responsibilities of the Vice Chair of Strategic Planning and Special Projects and how the PG/TF/AG’s leaders will work together, preferably early in each program year (if not before), and to periodically review and adjust the approach.

E. Collaboration and Strategic Partnerships

Collaboration underlies many of the functions typically performed by Vice Chairs of Strategic Planning and Special Projects. Collaboration is needed at multiple levels, including within the PG and with leaders of TFs, AGs, and other PGs as well as with organizations outside AHLA.

It is common for PG Vice Chairs of Strategic Planning and Special Projects to serve in liaison roles with AHLA TFs and AGs that are affiliated with the PG. This role typically focuses on acting as a bridge between the PG and the TF or AG by participating in conference calls for the TF or AG, being inquisitive, paying particular attention to issues of interest to the PG, and communicating with the PG’s leaders and the TF’s or AG’s leaders regarding common interests.

AHLA has maintained collaborative relationships in various forms with a broad range of organizations, such as health care associations, consulting firms, state and local bar associations, health law associations, and federal agencies. Associations that have entered into collaborative relationships with AHLA in recent years include, without limitation:

- Accredited Medical Equipment Providers of America
- American Academy of Home Care Medicine
- American Academy of Physician Assistants
- American Association of Nurse Attorneys
- American College of Radiology
- American Hospital Association, Society for Healthcare Strategy & Market Development
- American Medical Group Association
- American Society for Healthcare Risk Management
- American Telemedicine Association
- Centers for Disease Control and Prevention (Public Health Law Program)
- eHealth Initiative
- Center for Advancing Provider Practices
- Healthcare Financial Management Association
- Healthcare Information and Management Systems Society
- Medical Group Management Association
- Metropolitan Chicago Healthcare Council
- National Association Medical Staff Services
- National Bar Association
- University Health System Consortium
Depending on the PG/TF/AG and the particular subject matters involved, the number of associations that may be viewed as potential partners can vary from a few (or perhaps only one) to hundreds. Before agreeing to any strategic partnership it is important to consider the potential pluses, minuses, and other implications of the contemplated relationship. Synergies from strategic partnerships can benefit AHLA as well as the other association(s). Potential benefits include broadening the potential audience for programs and publications; obtaining access to expertise, speakers, authors, programs and publications; multidisciplinary collaboration with expanded access to expertise from non-health law experts; access to public interest convener sessions with government officials and health care stakeholders; and increasing visibility and membership.

In some cases it might make sense to expand strategic partnerships to include additional projects and perhaps other PGs/TFs/AGs. In addition, leaders of other PGs/TFs/AGs may be able to provide helpful input or involvement with the partnership.

With respect to potential downsides of a contemplated strategic partnership, particular attention should be paid to dynamics that could create complications, such as inadvertently getting involved in turf battles between organizations or other stakeholders with conflicting interests on a particular issue. For example, it is not unusual for physicians within different specialties, and therefore their specialty societies, to have conflicting interests on an issue, particularly in light of the hundreds of physician associations, many of which are focused on a particular specialty. Virtually every physician specialty has a physician association (and in some cases more than one). In addition, states and localities also have their own physician associations. This abundance of physician associations creates a wide range of potential partners, as well as risks of getting involved in turf battles between associations or of being viewed as favoring one association over another.

Due diligence will generally be in order when considering possible strategic partnerships with associations. A small commitment of research time on the Internet can often uncover positions taken by particular associations. Discussions with association officials and others who are familiar with the association can also provide valuable information. The mission, agenda, and interests of the organization and their members, as well as issues that could arise out of a contemplated affiliation, should be examined. An important question to consider before pursuing an affiliation is how other organizations would likely react.

Associations vary in their approaches to collaboration and their objectives. Some associations are receptive to certain types of partnerships or may be opportunistic with respect to certain issues. Moreover, the policies of an organization may change over time, particularly upon changes in leadership or philosophy.

When considering collaboration with another association or organization, please refer to AHLA’s “Affiliation Guidance and Special Project Intake” resource for guidance. It is accessible on the “Policies & Procedures” tab of the PG, TF, and AG leader website (www.healthlawyers.org/PGLeaders) under “Miscellaneous Policies and Procedures.” The request may be submitted in writing to AHLA staff at msc@healthlawyers.org and is required to include information as set forth in the document.

AHLA staff members can provide assistance on collaboration issues and should be consulted early in the process of considering strategic affiliations. In addition, please consider discussing collaboration opportunities with leaders of other PGs that may have contacts with the organization or an interest in the collaboration.
F. Conclusion

The importance of Vice Chair of Strategic Planning and Special Projects’ role in managing the PG/TF/AG’s Annual Work Plan cannot be overstated, and the Annual Work Plan process has been standardized in an effort to clarify and simplify the task for all PGs/TFs/AGs. However, the flexibility of the remainder of the Vice Chair of Strategic Planning and Special Projects’ portfolio are typically developed on an individual basis, and are expected to continue to evolve. In order to get the most out of this position, it is important for the leaders of each PG/TF/AG to work together in customizing the role to fit the particular PG/TF/AG and complement the other Vice Chairs.

G. Website Resources

Information and resources for Vice Chairs of Strategic Planning and Special Projects are available on the strategic planning and special projects resources webpage (www.healthlawyers.org/PGStrategicResources) of the PG, TF, and AG website. Those resources include:

- Contact information for all PG and TF Vice Chairs of Strategic Planning and Special Projects;
- Vice Chair of Strategic Planning and Special Projects job description;
- Description of the Annual Work Plan process (including timeline, format, and example Work Plan templates); and
- Other relevant information/resources added as needed.
IX. SOCIAL MEDIA COORDINATORS

Over the past several years, social media has evolved from a powerful means of personal communication to a medium for businesses and other organizations to promote their products, services, missions, and purposes. As with other industry organizations, AHLA seeks to capitalize on its own social media opportunity. This chapter is designed to outline best practices PGs/TFs may leverage to further specific PG/TF objectives through social media.

A. Why Social Media—Developing Your Social Media Objectives

While many scramble to develop a social media presence because “everyone else is doing it,” it is important for a PG/TF to first think about and determine what it wants to accomplish by using social media. This will not only drive what content a PG pushes through a social media tool, but also what social media tools a PG/TF uses. Some common objectives for PG social media use include:

- Attracting additional PG members;
- Providing members with news and other substantive content;
- Promoting webinars, publications, and related in-person meetings; and
- Increasing dialogue among members.

PGs should thoughtfully consider the objectives they want to accomplish through social media and then choose the right social media tools (described below) to accomplish these objectives. When establishing these objectives, PGs should consult and otherwise ensure such objectives and their means of accomplishment are consistent with AHLA’s “Social Media Policy,” which can be accessed, along with other social media related guidance and information, on the PG social media resource webpage (www.healthlawyers.org/PGSocialMedia) under “Social Media/Twitter Guidelines and Policies.”

B. Social Media Tools

There are many social media tools available for PG use. Those most commonly used by AHLA and its PGs and TFs include:

- Facebook
- Twitter
- LinkedIn
- AHLA Communities

To date, each PG and TF is active on Twitter, which provides real-time communication, content, and interaction with members. When using Twitter, PGs/TFs should make sure to include the designated AHLA hashtag to link all AHLA-related tweets together. AHLA encourages you to begin to expand and grow our conversations on both LinkedIn and the AHLA Communities, as well.

PGs are free to consider use of other social media tools, but should discuss using these tools with AHLA staff to ensure that they will be useful to accomplishing their objectives and serving the PG membership, while advancing the PG’s/TF’s Annual Work Plan. Social media is generally effective only when it is actively used/updated, so PGs/TFs should not seek to establish accounts with social media tools that will rarely be used.
C. Social Media Policy

All PG social media activities must be consistent with and comply with AHLA’s Social Media Policy. All PG/TF leaders, members, and volunteers who use a PG’s social media tools should review AHLA’s Social Media Policy and PG guidance documents prior to undertaking any social media activities.

D. Content

One of the significant considerations PGs must make when using social media is what content they will push through their social media tools. The most common forms of content shared via PG social media tools include relevant news stories, substantive PG materials, and the promotion of PG and other AHLA programs.

1. News Stories

In this day and age, there is no lack of news reporting or outlets through which individuals can receive breaking or other relevant news. This vast availability of news and information directly affects the health care legal industry where laws, rules, and regulations are constantly evolving, and it is imperative for health care legal professionals to stay abreast of such developments. PGs can use their social media tools as valuable resources to provide news of such developments and other relevant information to PG members.

For a PG/TF to maximize its distribution of news stories and other information and promote its relevance to its members, the following should be considered:

- Disseminating relevant and targeted content;
- Ensuring content is current; and
- Including a thought, a question or brief insight to generate conversation.

2. PG/TF Programs and Materials

PGs/TFs should consider sharing and promoting PG resources, activities, and distance learning events through social media tools. These may include:

- Newsletters, toolkits, and other publications;
- PG-sponsored distance learning events; and
- Relevant PG in-person/networking programs and events.

3. AHLA Programs and Materials

In addition to promoting PG-sponsored materials and events, PGs/TFs are strongly encouraged to promote relevant AHLA resources including in-person programs and post-program materials; public interest-sponsored events, publications, and other resources; monthly issues of AHLA Connections magazine; and any other resources that may also be valuable to AHLA members.

E. Live Posting

PGs/TFs may use Twitter, LinkedIn, or AHLA Communities to “live post” PG/TF or AHLA in-person programs. Live posting is an innovative way to: (1) provide AHLA members with real-time content and summary dialogue where members cannot attend a program; and/or (2) give members an opportunity to interact with the PG on certain relevant and thought-provoking topics.
Good opportunities to live post are at in-person programs and during webinars. Live-posting at in-person programs should be coordinated with the relevant PG/TF responsible for coordinating such activities, or AHLA (if no PG/TF has been designated to do so), to ensure maximum coverage of all sessions during an in-person program. If a PG/TF wants to assume responsibility for this role at a certain in-person program, the Chair should contact AHLA staff and the AHLA Social Media Chair to coordinate efforts.

When a PG live posts during an in-person program session or webinar, it should use its PG Twitter handle (for Twitter) and aim to summarize key points of the presentation using between 12-15 tweets. LinkedIn and AHLA Communities allow for longer, more insightful posts. As previously discussed in this chapter, each tweet should be consistent with AHLA’s Social Media Policy and should not only explain a key point, but promote dialogue among AHLA members and Twitter followers.

F. Volunteers

A significant challenge for PGs/TFs is obtaining and sustaining a meaningful social media presence. AHLA Social Media Coordinators may become overwhelmed if they try to do it all by themselves, so finding willing and dedicated individuals to participate in these efforts is key to having a successful social media strategy. Volunteers may be identified in a number of ways, including:

- AHLA’s monthly announcement of volunteer opportunities;
- Within a PG’s/TF’s LDP or an existing, more informal volunteer program within any given Group;
- Among a PG’s members;
- In coordination with the Young Professionals Council and/or the Diversity and Inclusion Council (or both); or
- Within a Social Media Coordinator’s own organization (firm, health system, etc.).

Soliciting volunteers is a great way to have existing PG and AHLA members become more involved in AHLA and also gain new members (to the extent solicited individuals are not already members).

G. Website Resources

Information and resources for Social Media Coordinators are available on the social media resources webpage (www.healthlawyers.org/PGSocialMedia) of the PG, TF, and AG website. Those resources include:

- Contact information for AHLA Social Media Chair and AHLA Social Media Coordinators;
- Monthly Twitter profiles statistics;
- AHLA Social Media Policy/guidelines;
- AHLA Twitter handles; and
- Other relevant information/resources added as needed.
X. LEADERSHIP DEVELOPMENT PROGRAM (LDP)

The LDP was born in 2009, as a way for the Hospitals and Health Systems (HHS) PG leaders to solve several related problems:

- A long list of PG goals, given the large, diverse PG membership;
- A motivated, but small PG leadership team that needed help to get it all done;
- A desire to give more members a chance to feel involved in the large PG; and
- A desire for a new and better way to identify volunteers and future PG leaders.

Credit goes to the HHS PG Chair at the time, Marc Goldstone, for his concept to enlist volunteers from the PG membership to shadow each Vice Chair, assist with specific PG tasks and projects, and generally learn the ropes of AHLA, and perhaps become future AHLA leaders. From a historical perspective, it is important to recall that the name “Leadership Development Program” was selected from several alternatives to best identify the nature of the opportunity offered by the Program. The Program does not guarantee any participant a later opportunity to serve in a leadership role, and so names such as “Leadership Advancement Program”, and Leadership Readiness Program” were not chosen.

The value of the program has been in exposing members to the projects and initiatives undertaken by the Group. This advance exposure provided by the LDP has reduced or eliminated the transition time for new PG leaders, thereby enabling PGs to maintain momentum and efficiency in accomplishing their objectives each program year. No doubt, this “AHLA Best Practices Guide for Practice Group Leaders” is also intended to help address the leadership transition challenge, but the LDP is intended to be the hands-on companion, providing the functional equivalent of knowledgeable “understudies” to the current PG leaders. Numerous alumni of the program have gone on to leverage their experience, and have applied for and earned leadership opportunities at all levels of the Association, including on the Board of Directors.

With that premise, this chapter sets forth some best practices for implementing and operating a successful LDP, based on the experience of several different PGs over the last several years. There is no special magic to these best practices. There are likely plenty of other ways, some yet to be conceived or attempted, for a successful LDP to ultimately be valuable to its PG. This chapter is merely meant to relay what has worked so far (and what has not), to help PGs avoid problems and avoid having to start from scratch.

A. Overview of the LDP Program—Annual Timeline and Milestones

LDP program—Annual Timeline and Milestones:

December—Call for applications announced

January 30—Deadline for application submission

April:
- PG/TF leaders review applications and select new LDP participants
- Newly selected LDP participants are notified and their willingness to serve is confirmed
- New LDP participants indicate preferences for initial Vice Chair assignments
Candidates not selected are informed and encouraged to stay active.

**June**
- New LDP participants connect with Vice Chairs and former LDPs to transition into role
- New LDP participants attend PG leadership conference calls

**July through May—Bulk of Program Year**
- LDP participants work with assigned Vice Chair; encouraged to take active roles in key activities
- Rotations—LDP participants may rotate assignment during the year to vary the experience
- LDP participants attend PG/TF leadership conference calls
- LDP participants encouraged to attend AHLA in-person programs to meet Vice Chairs and others
- LDPs participants encouraged to attend PG mid-year PG lunch programs when possible

**June (end of LDP program year)**
- LDP participants assist in transitioning tasks to new LDP class
- LDPs encouraged to attend Annual Meeting to meet new LDPs

**B. Selection of LDP Participants**

Selection of new LDP participants is one of the most challenging aspects of the program, because the number of strong applicants typically far exceeds the available slots. The volume of applications requires significant time and effort to review and makes for difficult and sometimes hair-splitting selection decisions. Each applicant is expected to submit a brief resume or curriculum vitae, a summary of AHLA activities, and what contribution the applicant can make as a member of the LDP. Candidates should be members of the applicable PG (or a member of any PG that sponsors a TF, if applicable). Selection of LDP participants is made by PG leadership. In making its selection of LDP participants, the PG leadership considers prior AHLA contributions; ethnic, gender, and racial diversity; geographic location; practice interest; balance of in-house and private practice settings; and any other factors deemed relevant by the PG leadership. By way of example, the HHS PG has typically asked each Vice Chair to rank their top ten applicants based on the various criteria listed above, and from that ranking, a consensus generally emerged on the best applicants, with the Chair having the final say on the selections. After the selection process is completed, each applicant is notified and their willingness to serve is confirmed.

Incoming LDP participants are encouraged to begin participation immediately by connecting with assigned Vice Chairs and make introductions. Further, incoming LDP participants should begin attending PG leadership conference calls (typically starting in July), which are intended to further describe the LDP and answer any questions. Finally, incoming LDP participants are encouraged to attend the AHLA Annual Meeting.

Candidates who are not selected for the program are typically informed shortly after the incoming LDP participants are confirmed. As a result of the large number of strong LDP candidates, those applicants who are not selected are encouraged to apply again in future.
years. Further, those not selected can be offered opportunities to serve in other available roles in the PG, and should be encouraged to join the PG’s/TF’s Talent Pool so as to capture their energy and keep them engaged with the PG/TF. Willingness to volunteer and contribute effort, despite not being selected to an LDP, is certainly a factor that should be considered when an applicant reapplies in future years.

LDP positions are for one program year, past LDP participants are typically not eligible to apply, and members may only hold one role within the PGs during a given program year. Application of these filters ensures that LDPs are offered to as many PG members as possible during any given year.

C. Roles of the LDP Participants and Rotations (Maximizing the Experience)

1. Assignments and Rotations

Each LDP participant is paired with a PG Vice Chair (or the PG Chair). Certain busier Vice Chairs (such as Vice Chairs of Educational Programs) may have two LDP participants assigned to assist with their heavy volume of activities and tasks. PG’s may elect to have two or more rotations, where LDP participants are reassigned to a different Vice Chair at some point during the program year to expose LDP participants to some variety of experiences. The HHS PG has found that two rotations per year works best for its program, given the dual desire for variety of experience, and for LDP participants to have the chance to see certain tasks through to completion before the rotation ends (or shortly thereafter). If there are rotations, assignments are typically made about a month before to allow for sufficient transition time, and some nearly completed tasks may continue to reside with the outgoing LDP participant when appropriate.

2. Active Role

LDP participants typically take an active role in specific projects and activities. While shadowing Vice Chairs is also a valuable activity for exposing LDP participants to leadership decisions and processes, most LDP participants have reported that the real value in the LDP has been in the opportunity to have a hands-on role in specific PG/TF programs, publications, and activities. Nothing prepares these potential future PG leaders better than actually trying out the job and nothing helps AHLLA more than the chance to “audition” its future PG/TF leaders through active LDP participation. In short, giving LDP participants lots of opportunity and responsibility pays dividends for everyone involved.

3. Attending PG/TF Calls

In addition to their role working with Vice Chairs on specific PG/TF tasks, LDP participants participate in PG/TF leadership calls, gaining insight into the leadership process on many levels. Further, LDP participants frequently participate in the calls, relaying activities they are working on, or delivering activity reports to the PG leadership when appropriate or when their assigned Vice Chair is unavailable.

4. Connecting with other LDP Participants

LDP participants participate in an initial check-in call and, effective in FY18, in the LDP online Community; this provides LDP participants with an opportunity to share what they are working on, indicate if there are any issues or concerns, and generally interact with each other. Leaders should also schedule monthly or quarterly LDP calls during the year to coordinate the activities
of the participants, gauge progress, and monitor the satisfaction of the participants. The Vice Chair of Membership (or other LPD Champion—see below) should chair such calls, and should report any issues detected on the calls to the PGs leadership, so that they can be quickly resolved.

5. Attending In-Person Events

LDP participants are encouraged to attend AHLA in-person programs throughout the program year they serve, if possible (with recognition that schedules and budgets may present challenges for certain LDP participants). The value in meeting with others face-to-face is certainly a key aspect of leadership generally, and one vision of the LDP program is to encourage frequent face-to-face time, whenever possible. The PG/TF will often plan gatherings for LDP participants at in-person programs, including arranging for assigned tables at PG luncheon events or breakfasts, and less formal gatherings during dinners or other social events. Typically the PG/TF luncheon at the Annual Meeting will include some recognition of the outgoing LDPs who have served during the prior program year.

D. Roles of the Vice Chairs in Working with LDP Participants

The following sections outline the role of the Vice Chairs (and Chair) in working with LDP participants:

1. Vice Chair and LDP Participant Relationship

The PG/TF Chair and Vice Chairs are central to the success of the LDP program. The crux of the experience for LDP participants is to be empowered by their assigned Vice Chair(s) to take an active role in the activities of that Vice Chair (Vice Chairs, if applicable). In so doing, Vice Chairs should be able to accomplish more than they otherwise could without the LDP participant assisting on key tasks and objectives. Vice Chairs must ensure their assigned LDP participant is included in various communications, to keep them informed, involved, and engaged in the PG activities they are participating in. Vice Chairs should also suggest specific project ideas for the LDP participant to adopt, and encourage their LDP participants to indicate interest when particular projects or activities interest them. Without this key element of Vice Chair participation, LDP participants are likely to report getting far less from the LDP program.

2. Vice Chair Support Generally

At the larger PG/TF leadership level, Vice Chairs should ensure the program provides LDP participants with education about activities of the PG/TF and AHLA generally, and provides LDP participants with access to various AHLA leaders and staff members. Finally, Vice Chairs should keep in mind that one purpose of the LDP is to help participants develop leadership skills. Many participants will be strong leaders already, but the program is also intended to help participants develop and improve their leadership skills, in a low-risk setting.

3. LDP Program Champion

Another key to success of the LDP is finding a champion for the LDP within the PG/TF leadership. While all Vice Chairs must buy into the LDP concept, as noted above, and make sure they provide the appropriate level of guidance to their assigned LDP participant, having a strong champion of the LDP is important as well—the LDP champion serves as the conduit between PG/TF leaders and LDP participants, as needed, to resolve any issues that may arise.
The LDP champion also will shepherd the selection process, attend regular LDP calls, ensure that LDP participants are engaged, and organize various LDP gatherings and activities. In the HHS PG, for example, the champion has typically been the Vice Chair of Membership, but in other Groups, the Vice Chair of Strategic Planning and Special Projects may also be assigned these responsibilities. The appropriate person may vary from year to year.

### 4. Replacement of an LDP Participant

Occasionally, a particular LDP participant may find that they are unable to continue to participate for some reason. Similarly, on occasion, leaders will observe that a particular LDP participant has failed to meaningfully participate or engage in their LDP role, whether by failing to attend calls or activities, or by affirmatively indicating a lack of continued interest or willingness to participate. Should an LDP participant need to discontinue participation (or if the PG/TF leadership determines that continued participation is no longer warranted), a suitable replacement may be sought for the remainder of the program year. Typically, if LDP applications were strong, plenty of replacement candidates are willing to step in.

### E. Regular Assessment of the LDP

The success and progress of the LDP and each rotation should be regularly assessed through conference calls and emails between participants and PG/TF leadership. In addition, a formal assessment tool may be utilized to permit the participants to provide a confidential assessment of the LDP. Another purpose of the program and regular assessments is to allow the PG/TF leaders to better connect with their membership (especially for PGs with a larger number of members). Evaluations and feedback from LDP participants has led to helpful adjustments over the years, including some already discussed in this chapter.

It may be possible to include a “law student” LDP slot, for an AHLA law student member who is interested and applies; the inclusion of such an LDP slot is subject to the discretion of the PG/TF Chair.

### F. Post-LDP—Keeping LDP Alumni Involved

When LDP participants conclude their time, keeping them involved in AHLA leadership, particularly the strongest participants, is obviously a central goal of the program. An online Community for all current and past LDP alumni, to be established in FY18, will enable LDP alumni to stay connected throughout and after their term of service has concluded. During the selection process, and after selections are announced, it is reinforced clearly to all applicants and selected LDP participants that service in the LDP is no guarantee of any future appointment to Vice Chair positions or any other AHLA position.

However, clearly one aim of the LDP is to identify future PG/TF/AG leader candidates, and many leaders have in fact served in an LDP prior to their leadership appointments, and were identified based on their service in the program. Thus, it certainly is fair to note that services in the LDP increases the odds of being selected for future leadership roles. It also gives participants the opportunity to better determine whether or not they have the skill and desire to pursue future AHLA leadership positions, as leadership may not be suited for everyone.

As it has evolved, finding suitable post-LDP roles for strong participants will always involve some deft skill and politics, particularly as the number of Groups with LDPs has grown. The
number of LDP alumni currently serving in leadership roles is substantial, but plenty of other strong participants are waiting in the wings as well, and ensuring AHLA most effectively deploys the varying talents identified by the LDP will likely be an ongoing aspect of the programs.

In some cases, LDP participants may continue to work on specific tasks to their completion, taking them a few months after their LDP year ends. In other instances, LDP participants may move on immediately to serve as PG liaisons to TFs or other PG-supported AHLA activities, such as the Young Professionals Council, etc.

The AHLA staff members are typically instrumental in identifying open positions that need to be filled and identifying matching suitable LDP alumni to serve in those roles. PG/TF leaders should work with staff to help ensure matches are made timely and the skills of particular LDP alumni are utilized most effectively.

G. Conclusion

The value of the LDP to those PGs that have an LDP has been measurable and lasting. Documenting the best practices for maintaining that success and improving on it is certainly an important goal of this chapter, and the hope is that the LDP will continue to provide that value to the stakeholders for many years to come.

H. Website Resources

Additional information and resources about the LDP are available on the membership resources webpage (www.healthlawyers.org/PGMembershipResources) of the PG, TF, and AG leader website. Those resources include:

- Example of LDP announcement and application; and
- Other relevant information/resources added as needed.
XI. TF AND AG LEADERS

A. Overview and Purposes of TFs and AGs

A TF is a group of leaders and members from two or more PGs that provides education, networking, publications, and other resources that crosses over practice areas. An AG is a group of leaders and members of one particular PG (or up to two PGs, if approved by the Board) that provides similar resources to a subspecialty or subset of members of the PG. Both TFs and AGs may:

- Publish topical articles on behalf of their sponsoring PG(s);
- Plan, sponsor, and/or create content for distance learning events;
- Publish alerts and briefings addressing topics that are of interest or importance to their constituents;
- Create or maintain online toolkits or other web-based resources for their PG; and/or
- Facilitate AHLA’s provision of other subject matter-focused member benefits that are within the purview of the TF’s or AG’s founding purpose or topical focus.

Additional detail is provided in the section of this chapter entitled “Typical Activities of TFs and AGs.” As you read this chapter, remember that, just as culture and practices within different PGs vary based on the size, practice area and predominant needs of the particular PG’s membership, the activities of individual TFs and AGs may vary.

B. TF and AG Leader Responsibilities and Operating Structure

Typically, a TF or AG has a Chair and up to five Vice Chairs. The Chair and Vice Chairs are responsible for managing the day-to-day activities of the TF or AG, with input and consultation by the Chair and Vice Chairs of the sponsoring PG(s) whenever and to the extent appropriate. The Vice Chairs’ functional responsibilities often mirror the functional responsibilities of Vice Chairs of the same title at the PG level (when a TF or AG has all five positions). For example, the Vice Chair of Educational Programs of a TF likely has responsibilities that are substantially similar to the responsibilities of the Vice Chair of Educational Programs of a PG. More information about defining the responsibilities of a TF or AG Chair and its Vice Chairs is in the section of this chapter entitled “Defining Chair and Vice Chair Responsibilities.”

The sponsoring PGs’ involvement in TF or AG activities may vary greatly. For example, some TFs and AGs primarily interact with their sponsoring PGs by participating in PG leadership calls (with more limited interaction outside of those calls), while others may have more regular contact. More information about the interaction between TFs and AGs and their sponsoring PGs is in the section of this chapter entitled “Working with the Parent PG(s).”

In addition to their different output priorities and functional needs, AGs and TFs may have different leadership cultures. The culture in the TF’s or AG’s leadership team may be influenced by the leadership style of the TF’s or AG’s Chair. The culture may also be influenced by the leadership style of the Chair of the Sponsoring PG(s) and the personalities of the individual Vice Chairs of the TF or AG. When you become a leader of a TF or AG, it may be helpful to think about the culture of your leadership team and assess how you as an individual, and your Group as a whole, can best advance the goals and objectives of the Group in the context of that culture. Identify and use your and your fellow leaders’ strengths to help make the team the most productive. Remember that good communication within the leadership team, as well as with the
leadership of the sponsoring PG(s) and the appropriate AHLA staff, may each and all be important to determining how best to execute the Group’s plans for the year.

C. Typical Activities of TFs and AGs

There are diverse needs within the diverse AHLA membership. AHLA’s 16 PGs address those needs in a fairly broad fashion. TFs and AGs help to meet more specific needs with topic-focused activities and resources. The specific nature of those activities and resources varies, but often includes at least a few of the activities from the list below. As with PGs, a TF’s or AG’s ability to engage in certain activities often depends on the commitment of its leadership team, number of leaders, its use of volunteers, and the availability of other resources from AHLA.

The process of making decisions about which of the following your TF or AG should pursue in any particular program year will be aided through development of an Annual Work Plan, which the Vice Chair of Strategic Planning and Special Projects, Chair of the TF or AG, in consultation with their TF or AG Vice Chairs and the relevant PG Chair(s) or PG Vice Chair(s), should draft at the beginning of the program year, in accordance with the Annual Work Plan process described in chapter VIII. (Again, the sponsoring PG Chairs or Vice Chairs may or may not provide input depending on the group and its leaders.) AHLA members and staff might influence the Annual Work Plan as well, and that input may be gathered from feedback offered in connection with prior activities, events, or program years. The Annual Work Plan may include a list of goals and timelines. For example:

- **Goal:** Provide education to members regarding the provisions and impact of new legislation
- **Action:** Develop and sponsor a three-part webinar series and accompanying toolkit addressing the legislation
- **Timeline:** September to February

Once the TF or AG has its Annual Work Plan documented, executing activities becomes a bit easier. Execution often requires assigning individual responsibilities and coordinating with AHLA staff. (For any planned activity, don’t forget to coordinate in advance with the appropriate AHLA staff. They are generally a leader’s most important resource for making sure that ideas can be translated into feasible plans, and to bringing those plans to fruition. If you have doubt about the appropriate AHLA staff member to contact, consult with the relevant PG’s Chair or Vice Chairs about with whom they think you should work.) TFs and AGs should be sure to coordinate with other PGs (through their leadership teams) and AHLA as a whole (through its staff) and take advantage of opportunities to combine resources and avoid duplicating efforts.

1) Sample TF/AG Activities—Educational Programs

Often, TFs and AGs will help serve AHLA members that have a particular topic interest by coordinating distance learning events that are focused on that topic. This is especially the case when there are legal, regulatory, or market changes that warrant a new or updated exploration of the topic or of some question(s) or issue(s) related to the topic. Depending on the nature of the intended audience and the timeliness and urgency of the subjects to be discussed, activities may be:

a) **Distance Learning Events**, such as webinars and web-based roundtable discussions, which may be conducted for members live and then made
available for subsequent purchase and “on-demand” download. Distance learning events may include multiple presenters and may be sponsored by, marketed to, and available to the members of multiple PGs, including but not limited to sponsoring PGs.

b) **Informal Events** held at AHLA’s in-person conferences. Some examples of prior TF and AG activities include: (i) discussion breakfasts, (ii) helping plan a PG luncheon, and (iii) submitting a proposal for a topic-specific presentation or panel discussion to become part of the conference agenda. For example, the Health Care Reform Educational TF and Behavioral Health TF co-sponsored a luncheon at the Institute on Medicare and Medicaid Payment Issues in 2017.

2) **Sample TF/AG Activities—Subject Matter-Specific Publications**

TFs and AGs may advance education or awareness regarding a subject within their topic focus through subject-specific publications. Such publications may include:

a) **Briefings.** When appropriate to provide members with detail or analysis of new legal developments such as court rulings, regulatory changes, or government policy shifts, a TF or AG may call on its Vice Chairs and/or on an established volunteer pool to draft a briefing for circulation to members of its sponsoring PG(s).

b) **Newsletter Articles or an Article in AHLA Connections.** When a topic or development warrants an in-depth analysis, the TF or AG may propose an article in their sponsoring PG’s newsletter, or may propose to coordinate and recruit topic-focused authorship for the PG’s submission to the *AHLA Connections* magazine.

c) **Topic-Focused Toolkits.** Each PG has the option to maintain toolkits on the PG’s dedicated website. For certain complex or evolving topics, a TF or AG may wish to propose and, if approved, develop content for an online toolkit that provides links, summaries and/or analysis for those seeking to better understand the topic (see chapter VII of this Guide for information and important update on toolkits).

3) **Sample TG/AF Activities—Topic-Focused Alerts**

a) **Alerts.** As a service to members, a TF or AG might utilize a committee of its Vice Chairs and/or member volunteers (who may be members of the sponsoring PG(s)’ LDP) to monitor news sources and government websites for new developments related to the TF’s or AG’s topic(s) of interest. When a new development arises, designated Vice Chairs or volunteers may, after AHLA staff approval, draft a short alert for release to members of the sponsoring PG(s).

b) **Social Media Posts.** Social media has become an important avenue for PGs to communicate with their members. TFs and AGs may use social media platforms such as Twitter, Facebook, LinkedIn, and AHLA
Communities to provide real-time updates of developments in their topic area, and to broadly promote distance learning events and publications that their group sponsors. AHLA maintains several online Communities that provide a forum for peer-to-peer questions, communications, and announcements. Certain TFs and AGs curate their own topic-specific Communities. Others may post questions, communications, and announcements on other relevant AHLA Communities. Such postings are an additional method to reach AHLA members who may have an interest in and may be served by the content and resources developed by the TF or AG. Some TFs and AGs create a “curation schedule” by which they create a rotation of Vice Chairs and/or volunteers to identify and post timely content. Such a rotation allows the burden to be spread among multiple individuals. Volunteers may work closely with the Social Media Coordinator of the sponsoring PG(s) to push out content under the Association’s social media guidelines.

4) Sample TF/AG Activities—Facilitating Networking Opportunities for Those with Common Interests

Opportunities to network with like-minded individuals can be an important benefit for AHLA members. At the beginning of each program year, and/or throughout the year, the leadership team of a TF or AG may want to consider the potential benefits and appropriate forums for facilitating networking opportunities for their constituents. One or more networking events may be identified and included in the TF’s or AG’s Annual Work Plan. Networking events may take several forms, and may be hosted by and targeted to members of just one group. They also may be an opportunity for members of different interest or practice areas to intermingle and share their different perspectives. As an example of the latter, multiple AGs that have members who undertake specific types of transactions might jointly sponsor a networking event. For example, the Fair Market Value, Physician In-House Counsel, Children’s Hospital, and Public Health Systems AGs, along with the Accountable Care Organization TF, has jointly sponsored a networking event that is intended for those who advise on regulatory aspects of physician compensation transactions.

Some examples of successful networking events from years past include:

a) **TF and AG Sponsored/Co-Sponsored Events at In-Person Programs**, including dinners, happy hours, and breakfasts; and

b) **Open Membership Calls** that allow participants to engage in interactive discussion of a hot topic or topics.

**D. Defining Chair and Vice Chair Responsibilities**

Most TFs operate in a manner that mirrors that of a PG, with a complement of five Vice Chairs who each have a specific functional responsibility (education, publications, membership, strategic activities and special projects, or research and website.) TFs may also have their own Social Media Coordinator. Many AGs operate in the same manner as TFs, with the same complement of Vice Chairs and discrete leadership roles (i.e., Vice Chair of Educational Programs, Vice Chair of Publications, etc.). However, not every AG does this. AGs have varying
sizes, membership composition, scope of focus and functional priorities, and as a result may have varying leadership needs. By way of example, an AG that has evolved to have a very substantial focus on producing publications or distance learning events may not function optimally if their Vice Chair of Publications or Educational Programs is overwhelmed while the Vice Chair of Strategic Planning and Special Projects has very limited responsibilities and engagement. This type of AG may best serve its PG and constituents if Vice Chairs “divide and conquer” responsibilities with, for example, committees of two or three Vice Chairs that are each assigned responsibility for a particular webinar, publication, toolkit, etc. Some leadership teams report their greatest successes when responsibilities have been spread among teams according to individual subject matter knowledge, enthusiasm for a particular activity, and/or availability during a crucial timeframe. The team approach allows individuals to backstop each other, and project-specific focus of teams can allow each team member the opportunity to focus on a limited number of activities where their efforts can shine.

E. Working with the Parent PG(s)

Generally, either the Chair or a Vice Chair of a TF or AG will attend the leadership calls of the sponsoring PG(s) and will make a report of their TF’s or AG’s activities during each call. These call participants effectively serve as TF or AG liaisons with the sponsoring PG(s). In addition, if needed and appropriate to discuss particular plans, activities or governance issues, the Chair of the TF or AG may have periodic one-on-one phone calls with the PG’s Chair and/or with specific PG Vice Chairs (based on the PG’s assignment of responsibilities to specific Vice Chairs). Many PGs designate a specific PG Vice Chair to be the liaison to each of its affiliated TFs and AGs. This PG Vice Chair may be the initial “go-to” person for questions and issues related to the activities that the TF or AG desires to undertake for or on behalf of the PG, and this Vice Chair may have regular phone calls with the Chair of the TF or AG. The liaison may even attend the calls of the TF or AG leadership team and become enmeshed with the PG or AG leadership team. However, when there isn’t a specifically-designated liaison in the PG leadership, or when there are questions or issues that, by their nature or potential impact on PG operations, are more-appropriately addressed to the Chair of the PG or to some specific PG Vice Chair (e.g., to Vice Chair of Educational Programs, Vice Chair of Publications, etc.). The initial or primary contact may need to occur between the TF’s or AG’s Chair and the PG’s Chair, or between a TF or AG Vice Chair and the appropriate PG Vice Chair (based on Vice Chair functional responsibilities, as described in prior sections of this guide). Specific circumstances and PG culture can influence how and when communications occur between leaders of the TF/AG and their sponsoring PG(s). A new Chair of a TF or AG may want to reach out to the Chair of the sponsoring PG(s) early in the new program year (especially if that PG Chair is also new) to establish the preferred communication protocol for any TF/AG questions or issues that may require input and counsel from the PG leadership team.

As stated above, however, the degree of interaction between TFs and AGs and their sponsoring PGs can vary significantly depending on the groups or individuals involved.

F. Managing Collaborations between AGs, TFs, and Different PGs

There may be occasions when a TF or AG determines that a subject or activity in its purview may be of compelling interest to AHLLA members who are outside the ranks of its usual followers and/or outside the ranks of its sponsoring PG(s). Alternatively, the TF or AG may determine that there is benefit to the AHLLA membership for the TF or AG to collaborate with other TFs, AGs, or non-sponsoring PGs to plan or develop a particular activity or initiative. When this occurs, someone on the leadership team of the TF or AG (usually the Chair) may, after consulting with
the Chair or designated Vice Chair(s) of the sponsoring PG(s), establish a collaborative relationship with the leadership team of another TF, AG, and/or PG. The collaborative relationship may be short-term and related to a single activity—for example, planning and sponsoring a single webinar or networking event. Alternatively, it may be a longer term collaboration that involves a single large undertaking or multiple smaller ones—for example, establishing a joint committee to assemble and edit an AHLA publication or toolkit, or co-developing and co-sponsoring a multi-part, year-long webinar series. Usually, these collaborations are most successful if they involve good communication and delegation of responsibilities to members of each group. One or two people from the leadership team of each of the collaborating TFs, AGs, or PGs may be designated to serve as the driver of the collaboration. These individuals may be responsible for developing and reporting timelines, communicating with AHLA staff, and providing regular reports (usually in the leadership calls) to the other members of their TF’s or AG’s leadership team. As in anything else, drive and enthusiasm are important factors that can influence the success of collaborations. For this reason, the Chairs and Vice Chairs of a TF or AG may want to seek out and select individuals—who may be fellow Vice Chairs, volunteers from the PG LDP, or from the TF’s/AG’s/PG’s own volunteer pool—who have the interest, time, and enthusiasm to make the collaboration a success. Check in with the volunteers regularly, and give them guidance, but give them the leeway, encouragement, and positive feedback to feel empowered. Most times, when enthusiastic and capable individuals are given ownership of a project and allowed the opportunity to shine, they work to make it a success.

AHLA’s TFs and AGs have evolved to serve an important function for AHLA members and have become vital to its breadth and depth of member benefits. As a leader of a TF or AG, you have tremendous opportunity to contribute to the resources that the Association offers, and, in turn, to influence the experience of your fellow members. We hope that this collection of TF and AG leadership tips will be a helpful guide for you to make the most of your term as a leader, and we wish you the best of luck on this endeavor.