



American Association
of Diabetes Educators

MY AADE NETWORK

Leadership Manual

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Also visit MY AADE NETWORK’s [Nationwide Leaders Network](#) for:

- Electronic versions of this document and attachments
- Electronic copies of all required forms
- Video & training materials for using

Introduction

PURPOSE OF MANUAL

The MY AADE NETWORK Leadership Manual will help you build and nurture your State Coordinating Body and Local Networking Groups' operations and serve as a place to keep updated information from the national organization readily accessible. It has been designed to be used, with the MY AADE NETWORK online community, as a resource for information and ideas and as a reference to the established guidelines of the national organization. If you have any questions relating to the content or require additional help with the business of running your group, there are many individuals at both national and state level who are able to assist you. For contacts, check the [Nationwide Leaders community](#) on MY AADE NETWORK or contact AADE staff:

Nadine Merker, Director of Volunteer Services - nmerker@aadenet.org or 800/338-3633 x 4810

Pati Mangano, Volunteer Services Manager - pmangano@aadenet.org or 800/338-3633 x 4822

John Tyler, Volunteer Services Specialist - jtyler@aadenet.org or 800/338-3633 x 4883.

AMERICAN ASSOCIATION OF DIABETES EDUCATORS

STRATEGIC PLAN 2010-2012

AADE is a multidisciplinary association of healthcare professionals dedicated to integrating self-management as a key outcome in the care of people with diabetes and related chronic conditions.

MISSION:

Driving practice to promote healthy living through self-management of diabetes and related chronic conditions.

VISION:

Optimal health and wellness for all people with diabetes and related chronic conditions.

VALUE STATEMENTS:

Leadership

AADE champions and encourages effective leadership in our organization and in our membership. Our projects and initiatives set the direction and the scope of diabetes education, and we lead the community by developing evidence-based guidelines, offering sound educational programs and promoting outcomes-driven care.

Integrity

AADE adheres to the highest ethical principles and shares a commitment to excellence in our work and our external relationships. We respect our members and the individuals they serve, and we demonstrate that through our actions, values and methods.

Diversity

AADE is committed to cultural and professional diversity. We are an inclusive and collaborative organization, and we strive to meet the needs of our diverse members and their patient populations.

Innovation

AADE embraces innovation and strategic thinking. We value and promote creativity and flexibility when approaching projects, meeting challenges and overcoming barriers.

Customer Service

AADE strives to consistently deliver high-quality service and support for our members and other stakeholders. We place the needs of the diabetes educator at the center of our products, programs and activities.

GOALS:

Public Affairs

Self-Management is central to quality diabetes care and prevention. AADE advocates for policies that improve access to self-management education by collaborating with key stakeholders in the healthcare community.

Practice and Research

The practice of diabetes self-management is evidence-based and outcomes-driven. AADE sets the scope and direction for self-management education.

Membership

AADE is the key to professional success. AADE provides opportunities and resources to advance skills and career goals and offers its members a vibrant, supportive network.

CODE OF ETHICS

Members of the American Association of Diabetes Educators accept this Code of Ethics as a statement of the ethical principles of the diabetes education profession. This code represents the values of the profession and provides guidance for the behavior of its members.

- The diabetes educator provides services with respect for the uniqueness, dignity, and autonomy of each individual as stated in the AADE Scope of Practice for Diabetes Educators.
- The diabetes educator will conduct himself/herself in a manner that demonstrates honesty, integrity, and fairness.
- The diabetes educator will avoid conflict of interest and maintain the integrity of the profession.
- The diabetes educator will accept responsibility and accountability for personal competence in accordance with the [AADE Scope of Practice and Standards of Practice for Diabetes Educators](#).

MY AADE NETWORK

This new membership connection and resource was introduced to members in August 2010 - with full access for all members in 2011 - that helps members network locally, around their states and across the country. For one dues fee, members have full access that includes unlimited Community of Interest, Local Networking Groups and state programming. By tapping into the network, an AADE member can reach other members 1 on 1, through events, and through an all-new, member-only social networking site.

From the local view, MY AADE NETWORK has three levels:

Local Networking Groups (LNG) – Small groups of diabetes educators in close geographic proximity to gather, network, hold educational events and participate in community activities. These are in many ways our traditional chapters with changes that essentially streamline the administrative duties, loosen organizational requirements and simplify the leadership structure.

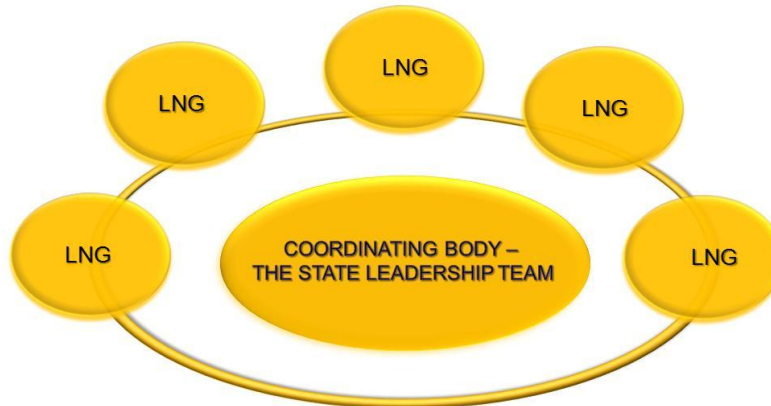
State Coordinating Body (CB) – The LNG will funnel into a coordinating body at the state level where ideas, events and resources are pooled. This hub for activity is lead by a Leadership Team with input from all LNGs.

MY AADE NETWORK Online Resource – All groups are tied into a 24-7 interactive portal being cared for and supported by national AADE. This online portal offers both administrative tools and member community tools. Through it, you can manage your events, send announcements, share documents, start group discussions, and made decisions. Members can talk to others about issues, share ideas, photos and stories, ask questions, and create instant meet-ups. These meet-ups let you get together in person to continue the conversation.

STRUCTURE MAP:

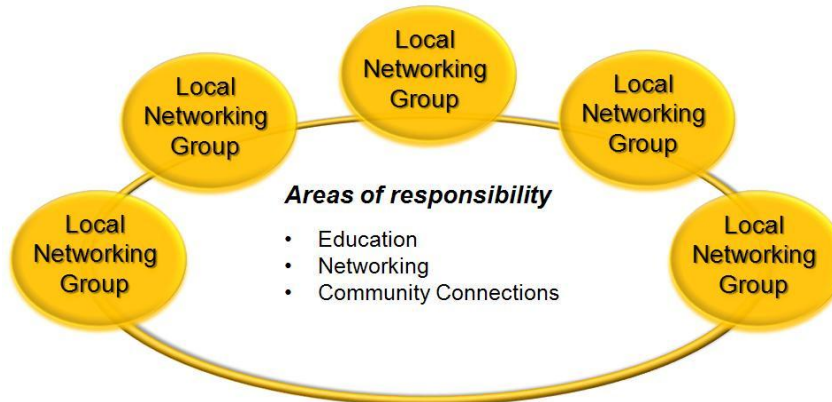


Coordinating Body Map:



Area of responsibility:
Coordinating Resources & Programs

Local Networking Group Map:



State Leadership

LEADERSHIP

This section is designed to help build your state leadership and includes suggestions for the purpose, roles and responsibilities of the team leaders. While these are by no means all inclusive, they are offered to serve as a guide to facilitate the Coordinating Body's development and operation.

COORDINATING BODY

Purpose of the Coordinating Body

- A Coordinating Body is a team of peers from around the state who together identify the priorities for meeting members needs (why and what), set the course for activities within the state (how), allocate funds, and serve as the primary contact to the national organization. Coordinating Bodies are not separate entities and therefore do not require by-laws, a governing board, incorporation or state registration (unless the state has special requirements).
- The term of service for Coordinating Body leaders should be Jan 1 thru Dec 31 to mirror the fiscal year.

Responsibilities of the Coordinating Body

- Serving as the contact point for the state to AADE national offices in terms of coordinating services and programs and on all legal and administrative matters;
- Representing the members in the state to the AADE national office to share concerns, needs and issues relating to diabetes education in the state;
- Serving at the AADE contact point within the state to diabetes educators and key constituencies;
- Serving as the financial administrator for the state, including preparing program budgets as needed, allocating dollars within the state, authorizing vendor contracts within the state as necessary, and working directly with AADE national staff which handles the financial transactions and records;
- Maintaining the state's virtual home page, including working with Local Networking Groups and members to use the site;
- Handling statewide communications to members;
- Coordinating Local Networking Group activities to maximize member participation and engagement;
- Assisting LNGs in securing CEUs through AADE for programs that require CE approval;

- Implementing state-wide programs (e.g., state-wide convention, public education campaign, affiliations with sister organizations, legislative effort) as determined by the membership and CB to be of importance to the membership;
- Selecting and mentoring future volunteers and leaders.

Requirements for the Coordinating Body

The team size, roles, working methods and schedule, and decision-making processes are to be determined by the state. The only requirements for this team are that it

- represents membership
- serves the membership as the whole
- operates by the Principles of Affiliation
- operates as a team

TEAM MEMBERS – ROLES & RESPONSIBILITIES

Below is a list of roles and responsibilities.

Chair:

- Lead the team; call for and preside at meetings
- Clarify the goals & roles for all leaders
- Steer the state overall to meet the members needs
- Serve as point person for correspondence from national office and share as appropriate with team and LNG leaders
- Represent the state to the Member Affiliates Council (MAC).
- Term: strive for a 1 to 2-year position; as needed or appropriate may serve longer; selected by the team members

Team Leaders

- **Overall Responsibilities**
 1. Work with Chair to orchestrate programs and needs within the state
 2. Together select the CB Chair
 3. Individual team members may assume oversight for specific areas such as Education, Advocacy, Membership; two roles, Technology and Finance, are critical and must be covered
 4. Individual coordinators are strongly encouraged to tap members at large for open volunteer positions and to form task forces to handle key programs such as a state-wide educational event or legislative initiative
 5. Work with LNGs and members to coordinate service delivery
 6. Term: strive for 1 to 2-year position; as needed or appropriate team members may serve a consecutive term; multiple consecutive terms are

not encouraged to assure greater opportunities for volunteer involvement from around the state

Specific Roles

Technology Leader (Req'd)

- Serve as Web Administrator, the “go to” person for the state network page online
- Keep front page updated & fresh
- Post items to calendar
- Oversee group announcements
- Serve as contact for LNGs to assist in developing their sections (calendar, discussions, etc.)
- Coordinate communication for state-wide events
- Works with the CB to ensure that ongoing activities and events, discussions & the like are captured on the state’s online community

Finance Leader (Req'd)

- Prepare, in conjunction with the Coordinating Body and input from LNGs, overall program budget to assure resources are allocated appropriately; should be prepared by June 1
- Prepare and submit as needed project requests for state-wide events
- Review and handle project requests made by LNGs
- Be the point person with national for getting financial reports, handling money requests, deposits, vendor payments, etc. within the state

Education Leader:

- Focus on building educational opportunities throughout the state largely by facilitating the activities of the LNG
- Survey members to determine educational needs and preferences and share with LNGs
- Reach out to LNGs to gather ideas and identify places to collaborate on events, replicate events across the state
- Encourage LNGs to have events
- Plan and execute (with team) state-wide events
- Be resource for LNGs

Advocacy Leader:

- Should be the AADE State Legislative Coordinator (SLC).
- Receive and communicate to state leaders and members the information regarding AADE legislative initiatives
- Coordinate “calls in action” on national and statewide legislative and reimbursement issues
- Identify and establish relationships with local state legislators and congressional representatives to acquaint them with the role of the diabetes educator as an essential member of the healthcare team and AADE’s legislative agenda.
- Communicate to the AADE Advocacy team information regarding reimbursement issues for diabetes education, equipment and supplies
- Coordinate state convening or participation in a local or regional diabetes coalition of associations sharing mutual legislative and public policy interests.

Membership Leader:

- Focus on building membership within the state
- Work with national and LNGs on membership promotions
- Actively encourage formation of new LNGs
- Work to see that AADE membership messages and materials are present at all events around the state
- Be point person for questions about membership
- Use public state network page to reach out to non-members

Suggested Team Protocols

The Coordinating Body will operate as a self-directed team sharing equally in responsibility, making decisions by consensus. To facilitate this, this section provides suggestions for meetings, decision making and elections.

Coordinating Body Meetings

There is no requirement for number or methods of meeting. It is recommended the team set-up a meeting schedule at the beginning of the year that meets the group’s needs targeting regular contact using the state leaders group discussion with phone calls and face-to-face meetings held intermittently. For example, the team may set up a bi-monthly check-in teleconference (6 per year) with two face-to-face meetings. Use the online state leaders discussion to share project updates, collaborate on ideas and make decisions.

Consensus-Decision Making

Consensus decision-making process is not as formalized as others (e.g., Roberts Rules of Order) allowing for details of implementation to vary from group to group. The core set of common procedures follows a simple structure that the CB should use:

- Discussion: The problem or decision needing to be made is defined and named. The goal here is to identify opinions and information on the topic at hand. Brainstorm possible solutions and create space for questions or clarification on the situation.
- Forming a proposal: Discuss the options written down and work through to a possible proposal.
- Call for consensus: The facilitator states the proposal so that everybody is clear and calls for consensus on the proposal. Each member of the group usually must actively state their agreement with the proposal.
- Identifying and addressing concerns: If consensus is not achieved, each dissenter presents their concerns on the proposal, and discussion continues to address or clarify concerns.
- Modifying the proposal: The proposal is amended, re-phrased or ridered in an attempt to address the concerns of the decision-makers. The process then returns to the call for consensus and the cycle is repeated until a satisfactory decision is made.

Elections

The Coordinating Body is annually selected through a call of volunteers with member input. There are two suggested methods for handling the process.

- Method 1: Call for Volunteers – Not based on geography
 - Call for Volunteers is sent out via the state network announcements with volunteer service forms returned to CB.
 - Current CB reviews submissions and places as appropriate on CB or task force.
 - Once the new CB is seated, the group seeks nominees for the Chair position from within the group. As appropriate, the CB will make the selection by either open or closed poll of the group members.
- Method 2: Call for Volunteers – Representation based on geography
 - Each LNG with more than 25* active members is invited to select a member/s to serve on the CB. The number of seats is based the LNG size with 1 seat for groups under 50* and 2 for those more than 50*. It is suggested that LNG's choose their representative through a call for volunteers with the LNG Chairs making the selection or by selecting representatives at a face-to-face meeting with those in attendance

casting a vote. We do not endorse formal elections for this process.

****Note these numbers are provided as a guideline; adjust based on average size for LNG groups in your state.***

- The CB will also select an at-large member/s to assure that the state is fully represented. They may choose to follow the process outlined in section i or the current CB could appoint an individual/s.
- The chair is selected as described in section i.3 above.

Creating a Volunteer Pool

A key element in the leadership structure is building a vibrant open volunteer pool that engages members in a variety of short-term roles such as writing, (e.g., online articles, announcements, blogs posts, press releases), contributing, (e.g., online group discussions, sharing samples, comments on blogs), rating (e.g., polls, professional surveys), speaking (e.g., event presentations), mentoring or coaching, representing (e.g., at community events, on state/local boards, to state legislature) or event coordinating.

To facilitate this, you can:

- Create list of open volunteer positions which are short-term (less than 6 months), one-time, or less than one-day.
- Set up Open Volunteer Discussion on state page to collect interested people and post openings.

Local Networking Groups

This section is designed to help build your Local Networking Group (LNG) and includes suggestions for the purpose, roles and responsibilities of the team leaders. While these are by no means all inclusive, they are offered to serve as a guide to facilitate the your development and operation.

The LNG is a group of peers in a convenient geographic area that connect and build affiliations. It is organized and authorized under the State Coordinating Body and coordinates all activities as well as administrative and funding needs through the CB.

LNGs are designed to form organically based on the desire of members. The LNG's primary role is coordinating local gatherings.

PURPOSE OF AN LNG

- Primary purpose is three-fold: facilitate networking among diabetes educators to mentoring, coaching and professional connections; provide easy-access to cost-effective education for CEs and professional development; and serve as diabetes education resource within the community.
- LNGs are also a key link to the full AADE family for all educators, consumers, patients, health care practitioners, and others and as such serve as an entry point for new members

REQUIREMENTS FOR AN LNG

- LNGs follow the policies and procedures determined by the CB and the Principles of Affiliation;
- All financial transactions for income and expense are conducted under the authority of the CB;
- Membership and participant guidelines are to be aligned with the CB and AADE; non-members and guests are welcome to participate however MY AADE NETWORK membership benefits are exclusive to paying members of AADE;
- LNGs are not separate entities and therefore do not require by-laws, governing board, incorporation or state registration (unless the state has special requirements);
- LNGs are lead by Facilitators or a Team with a Chair based on the needs of the group.

ESTABLISHING A NEW LNG

It is best to begin by identifying a few AADE members who want to build an ongoing networking group and then together identify activities that will benefit the group. It's easy to start the process using the Discussion section on the State Page.

- Start a New Discussion on the Group Discussion section in the state network to seek interested AADE members and start a conversation.
- Then stage a “meet-up” which is an informal gathering; request the event be publicized on the State Page.
- Once the core group commits to forming a group, share your ideas with the CB for support and discussion. The CB will then add your LNG to the state page and you can build from there

LNG LEADERSHIP – ROLES & RESPONSIBILITIES

LNGs have flexibility in structuring their leadership team. **Below is a sample of the two methods of selecting LNG leadership.**

Method 1: Smaller groups select co-facilitators

- Lead the LNG to meet AADE members' needs; call for and preside at meetings
- Serve as contact point for the LNG to CB in terms of coordinating services and programs and on all legal and administrative matters; reports all activity to CB
- Serve as contact point for participants in the LNG and those in state with interest in the LNG activities
- Serve as key contact on financial matters (bookkeeping and reporting handled through AADE and the CB)
- Facilitates/organizes activities in local area
- Organizes formal events including site location, topic, speaker, costs and works through CB on financial side and to secure appropriate CEUs
- Coordinates event registration (using the online system)
- Maintain the virtual LNG space, including working with members to use the site;
- Communicate with LNG participant about opportunities
- Term: strive for 1 to 2-year position; as needed or appropriate may serve longer; selected by the team members; Term runs Jan 1 – Dec 31.

Method 2: Larger groups select a leadership team chair

- Lead the team to meet AADE member's needs; call for and preside at meetings
- Serve as contact point for the LNG to CB in terms of coordinating services and programs and on all legal and administrative matters.
- Clarify the goals & roles for all team members
- Serve a key contact for AADE members & non-members in your area
- Actively seek to engage members as volunteers in the LNG
- May serve as key contact on financial matters (bookkeeping and reporting handled through AADE and the CB)
- Term: strive for 1 to 2-year position; as needed or appropriate may serve longer; Term runs Jan 1 – Dec 31; selected by the team members

LNG Leadership Team Responsibilities

- Together select the LNG Chair
- May choose to select a Vice-Chair or Co-Chair as needed
- Work with Chair to orchestrate programs and needs within the area
- Work with CB & LNG participants to coordinate service delivery
- Regularly survey LNG participants to determine needs and interest and plan activities based on the results
- Submit annually and then as needed approved expense categories and project requests to support events/activities
- Plan and develop quality educational programs
 - Work with CB to develop ideas and to collaborate with other LNGs
 - Work with CB to secure CEUs through AADE for programs that require CE approval
 - Handle event planning and logistics
 - Complete Project Request forms as appropriate
- Must cover or appoint an LNG participant as web administrator to handle the LNG's online community on behalf of the LNG. Web administrator's role includes:
 - Maintaining the LNG presence on the online community
 - Working with CB technology leader for adding events, documents and news
 - Coordinates with program planners on-line event registration
 - Sending out email communications and announcements
 - Engaging LNG participants in using the online community by marketing the community and helping them to learn how to use it
- Individual team members may assume oversight for specific areas such as Education, Advocacy, Membership, Administrator/Financial; the team may choose to give titles such as Education Program Chair

- Individual coordinators are strongly encouraged to tap AADE members at large to form task forces to handle activities
- Term: strive for 1 to 2-year position; as needed or appropriate team members may serve a consecutive term; multiple consecutive terms are not encouraged to assure greater opportunities for volunteer involvement; Term runs Jan 1 – Dec 31.

Suggested Team Protocols

LNG Leadership Teams will operate as a self-directed team sharing equally in responsibility, making decisions by consensus. To facilitate this, this section provides suggestions for meetings, decision making and elections.

Leadership Team Meetings

There is no requirement for number or methods of meeting. It is recommended the team set-up a meeting schedule at the beginning of the year that meets the group's needs targeting regular contact using the leader's community group discussion tool with phone calls and face-to-face meetings held intermittently. For example, the team may set up quarterly face-to-face meetings with regular check-in teleconferences. Use the group discussion tool to share project updates, collaborate on ideas and make decisions.

Consensus-Decision Making

Consensus decision-making process is not as formalized as others (e.g., Roberts Rules of Order) allowing for details of implementation to vary from group to group. The core set of common procedures follows a simple structure that the CB should use:

- Discussion: The problem or decision needing to be made is defined and named. The goal here is to identify opinions and information on the topic at hand. Brainstorm possible solutions and create space for questions or clarification on the situation.
- Forming a proposal: Discuss the options written down and work through to a possible proposal.
- Call for consensus: The facilitator states the proposal so that everybody is clear and calls for consensus on the proposal. Each participant of the group usually must actively state their agreement with the proposal.
- Identifying and addressing concerns: If consensus is not achieved, each dissenter presents their concerns on the proposal, and discussion continues to address or clarify concerns.
- Modifying the proposal: The proposal is amended, re-phrased or ridered in an attempt to address the concerns of the decision-makers. The process then returns to the call for consensus and the cycle is repeated until a satisfactory decision is made.

Elections

LNG leadership can be largely self-selected in small groups and more formally selected through member input in larger groups. **There are two suggested methods for handling the process.**

Self-Selection for Facilitators

- For smaller, informal groups, the participants gather to discuss what they want the group to do and assign tasks and responsibilities as well as facilitator within the group.
- To fill additional needs and encourage involvement, Call for Volunteers is sent out via the state network page with volunteer service forms returned to facilitator. The volunteer is invited to participate.

Selection for Team & Chair

- Call for Volunteers is sent out via the state network with volunteer service forms returned to current team.
- Team vets submissions and places as appropriate on team or task force.
- Once the new Team is seated, the group seeks nominees for the Chair position from within the group. As appropriate, the Team will make the selection by either open or closed poll of the group participants.

AADE Policies for Coordinating Bodies and Local Networking Groups

ENDORSEMENTS

AADE endorsement is an arrangement in which AADE name and/or logo are attached to a jointly developed document because of mutually agreed upon interests and positions on a specific topic/issue. The core issue is direct use of AADE's name and goodwill on an endeavor not substantively developed by AADE in exchange for payment.

COLLABORATIONS/PARTNERSHIPS

AADE collaborates or partners with a number of organizations in order to advance the strategic goals. They fall within two broad categories: non-profit and for-profit.

Memoranda of Understanding are signed with a number of non-profit organizations. Their purpose is to provide framework and clarity of collaboration.

Some of the organizations we have formed an alliance with are listed below:

- American Heart Association
- National Kidney Foundation
- American Diabetes Association
- National Institute for Health
- Center for Disease Control
- National Diabetes Education Program
- NQF
- Joint Commission
- NCBDE
- Diabetes Access to Care Coalition
- The Diabetes Care Project
- The STOP Obesity Alliance and The Obesity Society
- Partnership to Fight Chronic Disease
- Partnership for Prevention
- NCDP – The Alliance
- CMS, TES, JDRF, AACE

Financial Information and Record Keeping

CRITICAL DATES

<u>Date</u>	<u>Description</u>
January 1	Start of AADE Fiscal Year Coordinating Body / LNG Leader Term Begins
August	Prepare Coordinating Body plan and budget projections for next fiscal year
October 1	If you are seeking additional resource dollars through AADE, you must submit budget projections in no later than October 1 for consideration by the AADE Executive Committee in December
September	Select new State / Local Leaders
December 31	End of AADE Fiscal Year

CRITICAL ISSUES

All Volunteer Leaders have a fiduciary responsibility to perform “due diligence” in maintaining AADE assets and financial records at the local and state level.

Recommended controls:

- The State Finance Leader reviews all project requests generated in state before submission to AADE
- The State Finance Leaders reviews all financial reports from AADE and shares with State and Local leaders
- Keep the State Coordinating Body Charter and Affiliation Agreement up to date

Considerations:

- State Sales Tax may be required (501c6 tax status); consult with AADE
- Raffles and various fund raising programs may be subject to local tax and license laws

FINANCIAL POLICIES AND PROCEDURES*

*See [appendix](#) for all necessary forms

COORDINATING BODY FINANCIAL POLICIES & PROCEDURES

AADE will serve as a Coordinating Body Bank for all states, providing all standard accounting and financial services including account receivables/payable, bank reconciliation, monthly financial reports and tax returns. CB will direct how money is allocated and spent within its region. The following summarizes key policies and procedures.

Moving from a Chapter to an LNG

Existing Chapter entities will coordinate their activities with the CB and AADE. Chapters will close their tax ID numbers and utilize the national office for financial administration. Letter of Understanding

- The chapter/LNG will sign a letter of understanding to acknowledge the terms of transition.
- The chapter/LNG will designate a representative to handle remaining funds
- The chapter/LNG designate will sign a corporate card user agreement

Transfer of Funds

- All deposits will be transferred by check or wire to AADE
 - Chapter treasurers or presidents will verify that all checks have cleared
 - AADE will work with chapter leaders to handle Certificates of Deposit with maturity dates after intended transfer date.
 - A transfer form will be provided by AADE to the Chapter Treasurer
- Funds will be recorded on the AADE General Ledger
 - Funds will be recorded as received from each individual Chapter organization
 - A declining balance corporate card will be issued to the authorized Chapter/LNG representative upon receipt of funds and user agreement
 - The LNG representative cardholder will be responsible for the security and appropriate use of the funds on the declining balance. Fraudulent activity by the cardholder may result in a loss of funds.

Declining Balance Corporate Card

- The chapter/LNG leadership will submit a list of approved expense categories relevant to the needs of the LNG in lieu of a budget
 - Required cardholder information includes:
 - Legal Name
 - Social Security Number
 - Home phone number
 - Business phone number
 - Date of birth
 - Address
 - City State
 - Zip
 - Chapter Name
 - Email address
 - Security code (4 characters that the applicant can remember)
- The Chapter/LNG cardholders will submit itemized receipts and required documentation for all charges on the declining card to AADE each month.
- Once the Chapter/LNG balance is exhausted, all local transactions will be coordinated through the CB

IRS Requirements

- The chapter treasurer will complete a final Financial Activity Statement
- The chapter treasurer will file a final 990 Tax Return
 - Choose appropriate form:
 - Use the 990-N e-postcard if the chapter filed an e-postcard for 2009
 - Use the 990-N e-postcard if the chapter never filed a return and gross receipts were less than \$25,000
 - If the chapter filed a 990ez or 990 for 2009 because gross receipts were greater than \$25,000, then file the 990ez or 990 for the final return
 - Check the box indicating a final return
 - The Chapter Taxpayer Identification Number (TIN) will be closed
 - Also known as a Federal Employer Identification Number (FEIN)
 - AADE will coordinate with Chapter leaders to complete tax returns
- Chapter permanent files, financial statements and records for the previous seven years will be stored by AADE
 - To hold information for any IRS inquiry
 - AADE will provide shipping instructions

State Requirements

- Dissolution of Corporation: AADE will provide further information

- Notification of State Agencies as applicable

Funds

- CB Funds will be maintained by AADE
- Funds for each CB will be accounted for separately in the AADE General Ledger
- CB Leaders will release funds by requesting payment to vendors or for reimbursement of expenses
- An electronic monthly financial activity statement will be issued to CB leaders

Requisition of Funds

- The CB Leaders will work with AADE staff to develop a list of approved CB expenses
- Project Proposals are required for meetings and events (see section below)
- Vendor Payments
 - Vendors will invoice AADE directly
 - Payment will be made from invoices (not statements) directly to a vendor
 - Full support for delivery of goods or services must be provided before payment is issued
 - Terms of the contract must be met before final payment is issued
 - A W9 is required for all purchase of service vendors and for all individual payees
 - Volunteers may not accept gifts in exchange for preferential treatment in placing orders for the purchase of goods or services or for directing the business of the Association or the CB to specific vendors.
 - Any conflict of interest with a vendor must be disclosed to AADE prior to engagement
- Reimbursement of expenses
 - Subject to expense reimbursement policy located on the AADE website in the member center
 - An AADE expense report must be used and can be found on the AADE website in the member center
 - Itemized receipts are required
 - All food or beverage expenditures must include a listing of the individuals who participated and the business purpose of the meeting: as per IRS regulation
- Approval
 - The Volunteer Services Manager will review, code and obtain approval for payment according to the list of authorized expenses or project proposal.
 - The Director of Volunteer Services will approve CB expenditures up to \$10,000
 - The Chief Financial Officer (CFO) will approve CB expenditures up to \$50,000

- The Chief Executive Officer (CEO) will approve CB expenditures in excess of \$50,000
- Payment will be issued by AADE directly to the vendor or volunteer
 - Accounts Payable will issue payments within 5-7 business days upon receiving a correctly reviewed and coded invoice, check request or expense report with supporting receipts.

Project Proposals

- CB Leaders will work with AADE staff to prepare Project Proposals
 - CE educational programs at the State or Local Network Group (LNG) level
 - To the extent that CB funds are available
- Authority to Contract on behalf of AADE
 - CB Leaders will work with the Volunteer Services Manager to enter into necessary contracts to support budgeted programs and activities. Contracts will conform to AADE policies and procedures
 - The Director of Volunteer Services will sign contracts for funds up to \$10,000
 - The CFO will sign contracts for funds up to \$50,000
 - The CEO will sign contracts in excess of \$50,000
 - Except when the payment is only for expense reimbursement
 - Advance Payments must be invoiced by the contracted vendor
 - Advances will not be issued unless the advance terms are expressed in the written contract

Revenue

- Every CB fund will receive a direct allocation from the AADE dues paid by each member located in the CB's designated area. This direct allocation will be made in full to each CB at the time a member joins or renews, even if the member is paying for multiple year dues. Each CB needs to understand and plan accordingly that their dues allocation from AADE may vary annually based on the number of renewing or joining members.
- Registration revenue for CB educational programs and activities will be posted to the sponsoring CB's fund.
 - Grant and Sponsorship revenue obtained by the CB will be posted to the CB's fund
 - Grants and Sponsorships may be coordinated with the Volunteer Services Manager under the AADE TIN. AADE will be the payee
 - CE may be coordinated with AADE staff.
 - In lieu of advertising, CB's may obtain recognition sponsorship

- Sponsorship revenue is classified as advertising when the sponsor makes a quantitative or qualitative statement about their product in AADE printed material, on an AADE webpage, etc. in exchange for payment.
- Advertising revenue must be reported to the IRS and is subject to the corporate tax rate as unrelated business income

BUDGETING

Each state and LNG should have a simple budget of projected expenses and revenue that assures you have adequate funds to cover activities and events. (See sample form.) The larger and more complex the state and LNGs, the more detailed the budget needed to help drive decisions. AADE will track the expenses and revenue for the State. The State Finance Leader will, in concert with CB, determine allocation for dues revenue.

How to Establish Budgets

It is recommended that you prepare a program budget for each planned activity at the LNG or State Level. Each LNG will have to request funds through the CB if their planned activity is not self-funding (based on local dues, activity fees and sponsorships). It is at this point that the CB will have to weigh requests to allocate additional revenue that may be available e.g., at-large member dues, sponsorships, fund-raising dollars.) Some considerations in this decision may be:

- Extent to which it provides a service beyond the LNG sponsoring the activity
- Extent to which it is unique in the state and therefore a model or pilot
- Extent to which it is addressing an aspect of AADE’s mission that otherwise addressed
- Extend to which it is fostering a LNG

The State CB should craft a simple overall annual budget identifying key expenses for the State and revenue. This will help the CB make decisions on expenditures throughout the year.

When to Conduct Budget Planning

The AADE financial year is January 1 thru December 31. A guiding budget is best developed no later than October for review and approval by the group.

- There is no need to allocate all revenue in this guiding budget as the CB can consider project requests related to state funds throughout the year.

BANKING INFORMATION

Bank Accounts

Each CB and LNG will use AADE as their bank.

Note: Local funds must never be deposited in an individual officer's account.

CASH RECEIPTS AND DISBURSEMENTS

Please see the Financial Information and Recordkeeping for procedures and policies on all financial matters. CB should set up similar, easy financial procedures so that LNGs can without delay receive approved funds. These may include:

1. The LNG will submit a Project/Event Proposal request to CB which estimates expenses and revenue. The CB Finance Leader will review request and submit to AADE. The Project/Event Proposal
 - Activates the activity for all financial transactions
 - Open on-line registration as needed
 - Directs AADE Accounting Dept as needed for prompt processing of vendor invoices and expense reimbursements
 - Streamlines and expedites all accounting saving time and energy on program planners.
2. Receipts – Payments for registrations, membership and other activities can be paid by check, credit card or cash. Checks should be made payable to AADE . Funds will be handled as:
 - a. Any funds paid on-line for registrations or membership USING MY AADE NETWORK will be automatically allocated to the CB.
 - b. Any funds that are to be paid via mail, should be directed to AADE's Lockbox
 - c. Any funds collected on-site should be deposited immediately via AADE's Lockbox
3. Disbursements – To pay bills, submit (or have sent) the invoice or expense report (sample included, see Attachment D) via the CB to AADE Accounting:
 - a. If the payment is part of the approved Project/Event Proposal, it can be sent directly to AADE Accounting
 - b. If payment needs approval, submit to CB Finance Leader who will forward to AADE
4. All CB and LNG records are maintained on a “cash basis”. This means that money received is considered a Cash Receipt only when it is deposited in the bank, and money spent is considered a Cash Disbursement when a check is written. All cash receipts should be recorded and deposited as soon as possible and all expenditures should be recorded at the time they are made.

Tax Information

TAX INFORMATION

All CBs and LNGs are covered under AADE's tax ID and will be included in AADE's annual tax return.

FEDERAL TAX STATUS

Internal Revenue Service 501c6 Organizations

AADE – including local and state groups – has been exempted from the payment of income tax as 501c6 organization. Coverage to CBs and LNGs is based on your alignment with AADE and adherence to non-exempt purpose:

- Common business interest among its members.
- Purpose is to promote such a common interest.
- Does not engage, as a primary function, in a regular business of a kind generally carried on for profit.
- No part of the net earning may inure to any member.
- Not organized for profit. (Equity accumulation may be permissible)
- Activities are not confined to the performance of particular services for individual members.

To keep an exemption, all groups must continue to meet these standards. In some cases, abuses of the above can cause the loss of an exemption.

IT SHOULD BE NOTED THAT 501c6 ORGANIZATIONS DO NOT QUALIFY FOR NOT-FOR-PROFIT MAILING RATES.

State Sales Tax

THE ASSOCIATION IS NOT EXEMPT FROM STATE SALES TAX. The requirements for a state sales tax exemption are very stringent and relate primarily to charitable and educational organizations, such as schools, universities, etc.

RECOGNIZING UNRELATED BUSINESS INCOME

Certain income (such as revenue from mailing list sales and advertising income) of an otherwise tax-exempt organization (such as AADE CBs and LNGs) is taxable under the Internal Revenue Code. This income, called unrelated business income, is from (1) a trade or business that is (2) regularly carried on and is (3) not substantially related to the functions or objectives on which the organization's tax exemption is based. Each group must determine whether it has unrelated business income.

GENERAL DEFINITION

Trade or business

A trade or business includes any activity carried on to produce income from either the sale of goods or the performance of services. If an activity is one which business entities also carry on, it will generally be considered a trade or business for purposes of the unrelated business income.

Regularly carried on

A business activity that is frequent in nature and is carried on in a manner similar to comparable commercial activities of non-exempt organizations.

Substantially related to exempt functions or objectives

This portion of the definition of unrelated business income is generally the most critical. Income from activities is not taxable if the activity is substantially related to AADE's exempt functions. Income not substantially related to the exempt function generally is earned from activities that serve only to raise money to support exempt functions.

FORMS REQUESTED BY INTERNAL REVENUE SERVICE

If the LNG or CB has unrelated business income in excess of \$1,000, it will be necessary to submit information to AADE Controller before the November 15th IRS filing deadline.

ADVERTISING INCOME

The Internal Revenue Service says that advertising income must be considered an unrelated business activity, producing unrelated taxable business income.

Planning Process

Volunteer Leadership Forum & Resources

AADE conducts a Leadership Forum, leadership gatherings at Annual Meeting, and a knowledge base of samples, templates, ideas and group discussions for volunteer leaders to help them further develop their leadership skills and build strong local and state groups.

Log on to the [Nationwide Leaders community](#) to access resources and join or start a group discussion.

A simple way of starting a plan of action for your group is to host a brainstorming meeting. Invite all.

Before the Meeting:

- Review AADE's membership results for ideas and input.
- Get input from all members particularly those that can't attend the meeting via:
- Start a Group Discussion and invite AADE members to comment and add ideas.
- Do a series of simple polls on needs.
- Consider posting an edition of your e-letter that has a series of articles on different topics and ask for comments so you gauge interest.

Simple Agenda for a Brainstorming Session

- What did we do last year that we really enjoyed?
- What other events or activities outside AADE did you participate in and enjoy last year?
- What's on your list of "needs" to help you in your job this coming year?
- Share input gathered prior and ideas from the Member Survey.
- What are the hot topics / needs? Pick 3-5.
- Looking at each – what's the best way to address? Event, e-group, webinar, book club, teleconference, participation or lead in community event?
- Choose the activities that garner the greatest interest of the group.
- Assign volunteers to flesh out and set a time to check back and nail down plans.

Membership

GUIDELINES

Recruitment and retention of members are important activities for both the local state and national membership committees. **All participants in a LNG are required to be members of the national AADE organization.** This requirement strengthens the association's operating base and assures continuity and consistency in mission and goals. This section offers suggestions to help you perform this important function. Please refer to the "AADE Member recruitment Toolkit" for additional member recruitment information.

RECRUITING NEW MEMBERS

Recruitment of members is an ongoing function of the Membership Committee. The best source for building a viable prospect list is your current membership. The following suggestions come from groups that have conducted successful membership campaigns and are offered for your benefit.

- Register guests in a guest registration book at each meeting which includes, name, address and phone number so that you may send a new member recruitment follow-up letter (see sample) after the meeting. Contact AADE staff to add / maintain these prospects in AADE's database for ongoing recruiting efforts.
- Develop a "buddy" system for guests to make them feel welcome. Create a special way of introducing them at meetings and orient them to the organization and its projects/ "Sell" them on the benefits of the organization that are directly related to their professional needs. Follow up with a recruitment letter (see sample) or phone call from one of the volunteer leaders after guest attendance.
- Promote membership by advertising programs and project information to the local media and through the local hospital, HMO and home health in-house publications.
- Have a membership recruitment booth/table displaying your projects, benefits of membership and membership applications at all sponsored functions including workshops and other educational programs.
- Develop an incentive program for current members who sponsor and recruit new members. Award small prizes for anyone who recruits one member for the year and a trip and/or registration to the Annual Meeting for the most members recruited.
- Send membership applications with a cover letter highlighting the benefits of membership to potential members.
- Follow up on all membership inquiries with a phone call or letter.
- Enlist the cooperation of representatives from industry by supplying them with boundaries so they can keep you informed of new national members whom you can recruit for membership.

MEMBERSHIP RETENTION

Membership retention is vital to the continued health of your LNG and CB. AADE members who are actively involved in local activities rarely let their membership lapse. Make a concerted effort to match AADE members to activities that are satisfying for them. Members are the backbone and the life blood of our association. Develop a mentoring program whereby experienced AADE members function as mentors to new AADE members. This activity enables the experienced members to share their expertise and can prove satisfying to them and their new members. Additionally it provides for continuity of leadership by helping to develop new leaders.

Following are other suggestions designed to maintain interest in the LNG, avoid “drop-out” and leader “burn-out,” and generate increased attendance at meetings.

- Create a vibrant page on your MY AADE NETWORK page with up-to-date event calendar, regular e-letters or ongoing blog, active discussions and documents to share.
- Publicize meetings well in advance to allow AADE members to plan ahead and always publicize the next meeting during a meeting.
- Send notices on meetings to the AADE members via announcement and e-blast functions.
- Engage AADE members by delegate projects, involving as many members as possible in coordinating events, listing and updating a list of short-term tasks members can help with, and by hosting active e-discussions.
- Publish an online article or blog detailing activities. Meeting notices with announcements of guest speakers can be included to stimulate interest and generate attendance.
- Recognize outstanding service by AADE members at meetings and in “feature” articles in the newsletter.
- Include time in meetings for networking and socializing.
- Select meeting sites and times that meet your group’s needs. Be creative in selecting interesting sites. For instance, contact the chamber of commerce or visitors’ bureau for information on museums, historical buildings, libraries or concert halls that might be available for meetings at no charge.
- Give away door prize at each meeting. Door prizes can be table decorations, donations of products from members of industry, prizes solicited from local merchants, prizes hand made by members.
- Develop an “Educator of the Year” or “Volunteer Service” award recognition program.
- Invite guest speakers to meetings and offer continuing education credit for nurses, dietitians and other healthcare professionals as appropriate.
- Develop a scholarship award drawing program which awards registration to the Annual Meeting. Criteria for eligibility could include regular meeting attendance.

- Design a “needy patient” raffle drawing and give away diabetes care supplies donated by members of industry. Have members submit a patient name for the drawing.
- Include “I have, I need, I want” as part of the agenda of the meeting. This is a sharing session whereby educators may solicit, provide and receive help from their colleagues. Additionally it may generate seeds of ideas for future projects.

GUIDELINES FOR INVITING & INCLUDING NON-AADE MEMBERS

While the full benefit of AADE membership - including access to all the community tools on MY AADE NETWORK - are only available to full members, we know that there are others who do wish to connect and attend meetings and events. Some educators feel they are not able to join; other professionals aren’t practicing diabetes educators or have that as a minor part of their job – for these individuals membership may be impractical. It is not our intent to exclude people; however we do want to be fair to those who to invest in membership. Therefore, CBs and LNGs must follow the following guidelines:

- Limit access to full benefits – including ability to participate to get discounts, join in on member-only programs, ability to hold key volunteer positions, special recognition for activity – to paid AADE Members.
- Charge Non-members and guests more to attend your educational sessions. Make being an AADE member the cost effective choice.
- Provide names of guests to AADE staff to enter into a data base so AADE national can assist with member recruitment.
- Talk with each guest about the value of full membership and encourage them to join.

AADE Services

AADE Role, Responsibilities & Organizational Services for CBs

ROLE & RESPONSIBILITIES:

- AADE will support the Coordinating Body by providing technology, training, access to national staff for advice, and resources for the leadership team
- Determine and procure a risk management insurance program.
- Provide full volunteer management system that draws on the *Decision To Volunteer* findings and volunteer management practices; this will include:
 - Training and development programming for volunteers (ad-hoc and leaders); this includes skill assessment, skill development, education, coaching and mentoring, recognition and reward;
 - Portal for all volunteers to interact with their peers from around the country, enhance their knowledge of AADE and have access to documents and resources as needed to perform their volunteer roles; and
 - A robust volunteer recruitment programs that includes volunteer sign-up and follow-up protocols to assure individuals are placed in appropriate volunteer roles.

ORGANIZATIONAL SERVICES PROVIDED:

- MY AADE NETWORK, robust IT infrastructure to support member network groups in their activities, including
 - Web-based data management system;
 - On-line member community with discussion groups, file sharing and calendar;
 - Individual web page(s) with e-communications;
 - On-line event registrations including credit card payment and processing.
- Free CEU approval processing
- Membership processing which includes on-line join and renewal with credit card payment options.
- Financial services including banking, accounting and reporting, specified by the IRS and as otherwise may be consistent with sound accounting and audit practices; this includes easy access to accounting reports to assist leaders in planning and decision-making.
- Advice in key areas including event planning, educational programming and communications.
- Provide a compendium of resources drawn from best practices within the association profession to assist member network groups and their leaders in building and sustaining strong organizations.

Professional Development

OVERVIEW

A primary purpose of the Professional Development Committee is to enhance health professionals' competence in diabetes self-management training and care through the provision of quality continuing education on a continuum from entry level to advanced practice.

AADE programming is developed to support AADE's strategic plan which states, "AADE provides opportunities for its members and the broader healthcare community to advance their skills and career goals." This will be done by:

1. Delivering education and training to improve the skills of diabetes educators.
2. Providing education and training to the broader health care community.
3. Providing tools/options that support career pathways for educators.
4. Exploring the current status and need for credentialing.
5. Developing and implementing processes to approve curricula for diabetes education nationally and internationally.
6. Improving leadership skills.

Professional education activities providing accredited multidisciplinary continuing education credit include diverse educational formats encompassing learner or provider directed didactic and case based learning activities.

Educational opportunities are available from AADE or may be locally developed programs approved by AADE.

EDUCATIONAL OPPORTUNITIES AVAILABLE FROM AADE

Types of Programs:

- 1) **Corporate Symposia** – live 90 programs that provide objective, balanced information on a specific area of diabetes care and education; held in conjunction with the AADE Annual Meeting.
- 2) **Enduring Materials** - print or web-based instructional materials developed from the live Corporate Symposia offerings at the AADE Annual Meeting.
 - * Web: Webcast of live Corporate Symposia (audio over PowerPoint)
 - * Print: Journal supplement based on transcript of live Corporate Symposia
- 3) **Webinar** - Live web-based seminar that consists of an interactive presentation/lecture and question and answer session.
- 4) **Diabetes Educator of the Year** - The Diabetes Educator of the Year Award is presented to a diabetes educator who makes outstanding contributions to their profession. The Diabetes Educator of the Year shares these innovations through invitations to speak at local meetings and other AADE regional events. This program is a **provider unit** program and the program itself is only accredited for the duration that that person is Diabetes Educator of the Year.
- 5) **Annual Meeting Sessions** – live sessions that vary in topic each year depending on the goals of the annual meeting.
- 6) **Pre-conference programs** – are live continuing education programs held before the start of annual meeting.
- 7) **Contract Programs** - a program developed and accredited by AADE which is available to outside entities for a fee which includes slides, handouts, and content; these programs are for industry use only.
- 8) **Live Meetings** – Core Concepts Course and any other live programs developed

LOCALLY DEVELOPED PROGRAMS APPROVED BY AADE

Diabetes educators are continually seeking CE credit for license and certification renewals. AADE is an accredited approver of continuing education in nursing by the American Nurses Credential Center's Commission on Accreditation (ANCC), in pharmacy by the Accreditation Council for Pharmacy Education (ACPE), and in dietetics by the Commission on Dietetic Registration (CDR).

Applying for CE credit for RN, RD, and/or PharmD through the AADE approver unit adds extra value to your educational programs with nationally recognized continuing education (CE) credit and is easy -- one application can provide credit for all three disciplines if desired. AADE will save your LNG time and money by assuring that your programs meet all accreditation standards in three disciplines that typically have the most impact on patients with diabetes in one application. We are one of the few organizations that can grant your program accreditation for nursing, dietetics, and pharmacy education in one peer review process.

Over the past sixteen years, the American Association of Diabetes Educators has successfully approved hundreds of educational programs and granted thousands of continuing education (CE) credits on diabetes topics which have reached healthcare professionals across the nation. Whether you are holding many programs or just offering one CE program a year, AADE approved accreditation can increase the value and help to increase attendance at your program. Plan the program of your choice to fit the needs of your targeted audience and AADE's peer review process will assure that your program meets the high standards of quality that educators expect. [Note: AADE is recognized by NCBDE as an approved provider of CE credit for CDE's.]

As part of its responsibility as an accredited CE provider, AADE promotes your program with accreditation organizations and lists each program in the AADE searchable database. This helps to market your program and maximize your visibility with potential attendees.

Your application for continuing education credit will be reviewed by a multidisciplinary team of trained peer reviewers. Our peer review team will review your program's goals, objectives, and teaching methodologies to assess the educational effectiveness of the learning activity, and make sure that your program content is fair and balanced. We will provide your program administrator with valuable feedback and vital recommendations for change to assure your application complies with all standards and may be approved for credit.

The application for CE credit approval is available on our website, www.diabeteseducator.org. For more information, contact Charlene Novosel cnovosel@aadenet.org

In the remaining pages of this section we have included information that you will find useful as you develop local programs for approval for continuing education:

- **Educational Program Development**
- **Approval of a Continuing Education Program**
- **Accreditation**
- **Statements of Credit**
- **Program Activity Evaluations**
- **Delivering Your Message: Engaging Your Audience**

EDUCATIONAL PROGRAM DEVELOPMENT

Developing an educational program requires advance planning. Determining the educational needs of your target audience should be considered when planning a program. Input from members of the target audience should be used when determining educational goals and learning objectives. Strategies for assessing educational needs could include: periodic surveys of the target audience, use of an advisory or planning committee which includes representation of the target audience, or inclusion of suggestions provided on a previous programs evaluation form.

Goals and Objectives

Educational goals and learning objectives should be clearly stated and be measurable. They can be a basis for an evaluation of the program's effectiveness. These goals and objectives should reflect the relationship of the program topics to current diabetes practice. Goals should be developed early in the program planning process as well since they can provide guidance and direction for development of content, supplemental instructional material, learning assessment activities, and program evaluation. When developing goals and/or objectives use the SMARTER Objectives:

- **Specific** – uses specific terms rather than vague, abstract ones
- **Measurable** – includes a method for objectively measuring achievement
- **Achievable** - challenging but realistic
- **Relevant** – supports the strategy and structure/capacity of the organization
- **Timely** – specifies a period or deadline, which can be short-, medium-, or long- term, depending on what is appropriate
- **Effective** – focuses effort on critical, not trivial factors; addresses the “80/20 rule”
- **Reinforcing** – each goal should support the others; together they should describe the full contribution an individual will make in the coming year

Topic Development

Continuing education programs should address topic and subject matter areas which are relevant to the practice of diabetes and well-balanced in presentation. All programs should provide a presentation with fair, full disclosure, and impartial balance. Programs should be free from promotional influence or content, especially if commercially supported. The content should directly relate to the outcome of the program. A group of topics should be related and logically sequenced in an effort to provide opportunities for well coordinated continuing education experiences. If the program has multiple lectures, all segments should be integrally related. The content should provide outcomes that apply to practice.

Program Instructors

The instructors of the educational program should be competent in the subject matter as evidenced by their background, experience and credentials and present information based on scientific principles and current information. The appropriate number of instructors should be determined by; topics to be covered, the need for balance, and the duration of the entire program. The instructional method should be appropriate for learners and be compatible with the objectives and outcomes.

By incorporating all of the elements of continuing education program development, your program is geared for success. For more information, please contact:

Charlene Novosel cnovosel@aadnet.org

* Content of article adapted from Commission on Dietetic Registration (CDR) Handbook and Accreditation Council for Pharmacy Education (ACPE) Criterion

APPROVAL OF A CONTINUING EDUCATION PROGRAM

Continuing Education Application

If you have or plan on submitting an application for continuing education approval, you might wonder why AADE requests certain information and how the application gets approved. AADE is an accredited approver for American Nurses Credentialing Center (ANCC), Commission on Dietetic Registration (CDR), and the Accreditation Council for Pharmacy Education (ACPE). Each accrediting agency gives AADE the ability to approve continuing education based on adherence to their criterion or guidelines. Therefore we request certain information in your application to meet these requirements.

Continuing Education Planning Team

One of the areas AADE reviews is the members of your planning team. Since AADE is a multidisciplinary organization we prefer the planning team consist of at least two different disciplines represented by the target audience in planning a quality program for expected outcomes. Among the criteria for ANCC, there is a requirement for a nurse to be involved with the planning, implementation and evaluation of the continuing education activity. Both CDR and ACPE require that individuals who are developing continuing education be competent in the subject matter as evidenced by their background, experience, and credentials.

Approval Process

After an application is received it is reviewed by the Practice Associate, (AADE staff) to make sure all required information is present before it can be reviewed; applications must be complete before being disseminated for peer review. The review team consists of a multi-disciplinary group of volunteer reviewers. Each discipline of the target audience must be represented on the review team. Each discipline has a lead reviewer who reports the status of the application back to the Practice Associate. The lead reviewer from the RN discipline is called the **Nurse Peer Review Leader** (a registered nurse who holds a graduate degree). Currently, there is no requirement for the RPh or RD leader to have a graduate degree. Each discipline lead reviewer evaluates the program application to make sure that each activity will provide a quality continuing education experience for the participant.

If revisions need to be made, the application is sent back to the applicant/program planner for correction. Once revised accordingly, the reviewers can give final approval. If no revisions need to be made approval can be given upon finished review.

If you have any questions regarding the process for approving continuing education activities, please contact: Charlene Novosel cnovosel@aadenet.org

ACCREDITATION

Are you providing a continuing education program and seeking to obtain credit through AADE? If you have in the past or are planning to in the future, remember to visit the website: www.diabeteseducator.org to download the current application and instructions.

Promotional material requirements

In order to meet the standards of our accrediting bodies, there are certain criteria we need to include in promotional materials. To help with the promotion of educational programs a sample is available to use as a reference when developing your program (refer to attachment). All promotional materials must include:

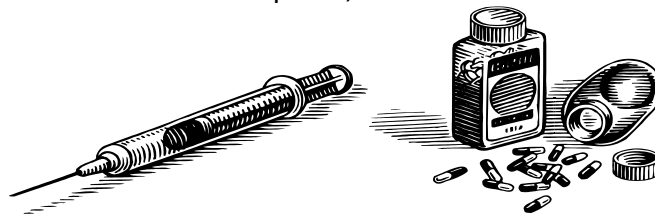
- The program title
- All objectives
- Date and time of program
- Location
- Logo(s) and credentialing statement(s).
- Overall program goal(s)
- Target audience
- Faculty member(s) & their credentials and title
- Program schedule
- Requirements for successful completion
- A statement indicating when and how a participant should expect to receive a statement of credit, (e.g., by mail within 4-6 weeks following the program)
- The initial release date
- Co-provider(s) (if any)
- Cost and refund information (if there is no cost to attend the meeting, then it must be noted)
- Number of contact hours/CEUs
- Outside financial support, must be named, if any (i.e., Supported by an unrestricted educational grant from XYZ, Inc).

SAMPLE PROMOTIONAL MATERIAL

The Southwest Indiana Local Networking Group invites you to attend:
Current Trends in Diabetes Management

Presented by: John Doe, MD
Indiana Diabetes and Endocrinology, Fort Custer, Indiana

Thursday August 17th, 2006
6:00pm-8:30pm
McKillip Hospital
Johnson Conference Room
2300 N. Hope St., Indiana 46707



This program is sponsored by an unrestricted educational grant from ABC, inc.
There is no fee for this program.

Schedule:	6:00pm-6:30pm	Dinner
	6:30pm-8:00pm	Educational Program
	8:00pm-8:30pm	Networking

Target Audience: Diabetes educators who specialize in diabetes management, such as nurses, dietitians, or pharmacists.

Educational Goals: Diabetes is a growing epidemic that affects millions of Americans a year. By attending this program you will get an up-to-date guide on how to care for your patients with diabetes.

Program Objectives:

1. Identify 3 new medications recently approved for use with diabetic patients.
2. Describe aggressive therapeutic approaches to achieve tighter blood glucose control.
3. Discuss strategies for improving patient outcomes.

SAMPLE PROMOTIONAL MATERIAL

To receive educational credit for this program attendee must attend the entire session and complete the evaluation form. Once the evaluation form is completed and turned in a statement of credit will be issued.



This continuing nursing education activity was approved by the American Association of Diabetes Educators, an accredited approver by the American Nurses Credentialing Center's Commission on Accreditation.

This program, xxxx-xxx is approved for xx contact hours.



American Association of Diabetes Educators, (AM001) is a Continuing Professional Education (CPE) Accredited Provider with the Commission on Dietetic Registration (CDR) from June 1, 2006 to May 31, 2009. Registered dietitians (RD) and dietetic technicians, registered (DTR) will receive __ continuing professional education units (CPEUs) for completion of this program. Continuing Professional Education Provider Accreditation does not constitute endorsement by CDR of a provider, program, or materials.



The American Association of Diabetes Educators is accredited by the Accreditation Council for Pharmacy Education as a provider of continuing pharmacy education. This program provides __ contact hours (.__ CEU's) of continuing education credit.

ACPE Universal Program Number: XX-XXX-XXX

Effective Date: _____ to _____

The approval of this educational offering by AADE does not imply endorsement of specific therapies, treatments, or products discussed in the presentations.

STATEMENTS OF CREDIT

A statement of credit is used to provide confirmation to each learner of successful completion of a continuing education program. Included in the AADE application for continuing education credit approval is a sample statement of credit. The Accreditation Council for Pharmacy Education (ACPE) requires that the program administrator ensure participation in order for the learner to receive a statement of credit. To determine participation in a program a learner may be required to complete a post-test, participate in a study group, or complete an evaluation at the end of a program. The statement of credit must be issued at the end of a program or at a later date (in a timely fashion). The learners name must be added by the program administrator after records of successful completion are reviewed. **Therefore no blank name statements of credit can be issued when developing a program that includes pharmacists.** If you have questions regarding statements of credit, please contact Sarah Kraus at the address listed below.

PROGRAM ACTIVITY EVALUATIONS

At the end of each continuing education program an evaluation form should be completed by each participant. The information contained on the evaluation is a vital tool to provide feedback for continued improvement and to assess effectiveness of the program.

Key components that should be monitored and evaluated may include, but are not limited to:

1. Participants - overall program satisfaction, achievement of personal goal and objectives, etc.
2. Instructors - pacing of presentation, knowledge of subject matter, clarity of presentation, etc.
3. Topic - appropriateness of the level of difficulty, relevance to practice, overall balance, etc.
4. General context - the facilities, administration of the program, convenience of location, etc.
5. Equitable balance - was the presentation un-biased, lack of commercialism, etc.

Sample Questions on the Program

- Were the objectives of the program met as outlined/described?
- How interesting was the program/topic to you?
- Can you apply 50% or greater of today's content to your practice?

Sample Questions for Improvement on Programming

- What did you find most helpful about today's program?
- Suggest one change the group could make to improve programming.
- How could the program have been improved?

Sample Questions for Feedback for the Speaker

- Rapport/Interaction – displays good eye contact, encourages questions
- Organization – relates topic to practice, information flows logically
- Presentation - explains subject matter in familiar language, speaks at appropriate pace, reinforces difficult concepts by repetition or examples
- Command of Topic Area – demonstrates comprehension of topic, covers appropriate amount of material, complexity of material

With the distribution and collection of participant evaluations, a summary of comments or feedback can be used to assess the program, speakers, and topics to help with future program development. Also, if the program is to be repeated, these comments will help the program planner to improve the program by making recommended changes before the next presentation of the program.

For more information regarding program evaluation, please contact:

Charlene Novosel cnovosel@aadenet.org

DELIVERING YOUR MESSAGE: ENGAGING YOUR AUDIENCE

Instructional Delivery Methods

When planning a continuing education program it is important to consider the method of educational delivery (live or self-study). Appropriate consideration should be given to educational content and learning objectives, as well as the size and the composition of the intended audience. Information regarding the learning format preferences of the intended target audience should be taken into consideration when selecting the delivery method.

Participant Involvement in Learning

Once the method of delivery is selected, it should allow for and encourage active participation and involvement from the participant.

What is active participation? Active participation encourages the audience to do more than passively listen to a lecture. Participants are processing and applying knowledge gained during the lecture. Active participation requires the audience to talk, listen, and reflect on the material presented.

In live programs, approaches include, but are not limited to; case-studies, problem solving activities, simulation exercise, and structured question and answer sessions.

In self studies, approaches include, but are not limited to: pre-testing, interim quizzes with answers provided, problem solving, post-testing, and other self-assessment activities.

Recommendations for incorporating active learning strategies:

- Select strategies with which you feel comfortable
- Develop a goal for the activity and determine when in the lecture the activity will occur
- Determine what preparation you will require to effectively use the activity
- Develop a plan for the activity, implement the activity and collect feedback. Use the feedback to modify the plan

For more information, please contact:

Charlene Novosel cnovosel@aadenet.org

* Information adapted from the Accreditation Council for Pharmacy Education Provider Accreditation Manual

Technology

Technology Platform - A comprehensive online resource

Each CB has a State Landing page on the MY AADE NETWORK which includes links for all established Local Networking Groups. Complete details including training videos and a tour are available on [MY AADE NETWORK](#). This is both a tool for CB and LNG leaders and an online community to build a camaraderie and engagement in your LNGs.

TOOLS AVAILABLE

- a. **Send out state announcements** so that members are kept up to date on the activities going on.
- b. **Create an e-letter.** Using the blogging platform, create articles using a Word-like tool, send to members and have it posted automatically. This also appears in the latest news area so you can keep members updated. Ideas for topics include:
 - News about LNG participants such as promotions, awards received, speaking engagements
 - Listing of new association members. Include background information to personalize your welcome.
 - Question/answer column on your LNG, diabetes education; the topics are unlimited
 - Interviews with key people in your community. This extends the newsletter as a public relations tool.
 - Promote national AADE events and reinforce the local connection.
 - Announce functions of your LNG's activities and to solicit to volunteers
 - Regular features on such things as teaching tips, member news, legislative updates or book reviews.
 - Highlight articles of interest from *The Diabetes Educator* and repeat dates and events of interest mentioned in other AADE publications (see AADEFYI).
- c. **Create a blog.** The blog articles appear in the latest news area so that you can keep members updated from a State Network level.
- d. Use **discussion forum** gather member input, collect ideas and gauge interests.
- e. Use your own **document library** upload valuable governing documents and other items and to share documents, templates, presentations and more!
- f. **Create upcoming calendar items!** Are you planning a meet-up on Friday? Add it to the calendar so other members can participate!
- g. Access to **up-to-date member database** where you can look up and add members!
- h. **Add important external/internal links.** As an administrator you have the option of adding links to the bottom of your State Networking page. This will help your members find the information they need.
- i. **Discussion forum** provides space to engage members. This is a great networking opportunity and a chance to swap best practices! The forums allow you to post directly online or participate via an email listserv. Forums are set up both at the state and local levels.
- j. **Invite comments on articles.**

- k. Invite members to share resources for the **file libraries**.
- l. Access to search and **find other members!** Remember meeting someone at one of the local events? Now you can find them online and continue the discussions and sharing!
- m. See the Toolkit title: “15 Ideas To Engage Your Members in an Online Community” in the Appendix for guidance and more ideas on building your state network page.

MANAGING YOUR STATE NETWORK HOMEPAGE*

Your State Network Page is the place members from your state can visit to keep up-to-date with what is going on. Users can view your announcement lists, forums, file libraries, blogs, meeting calendar, and more.

***Short “how-to” videos are available for admins to view at any time in the private admin and leader communities (the burgundy rectangles on the right-hand side of your state page).**

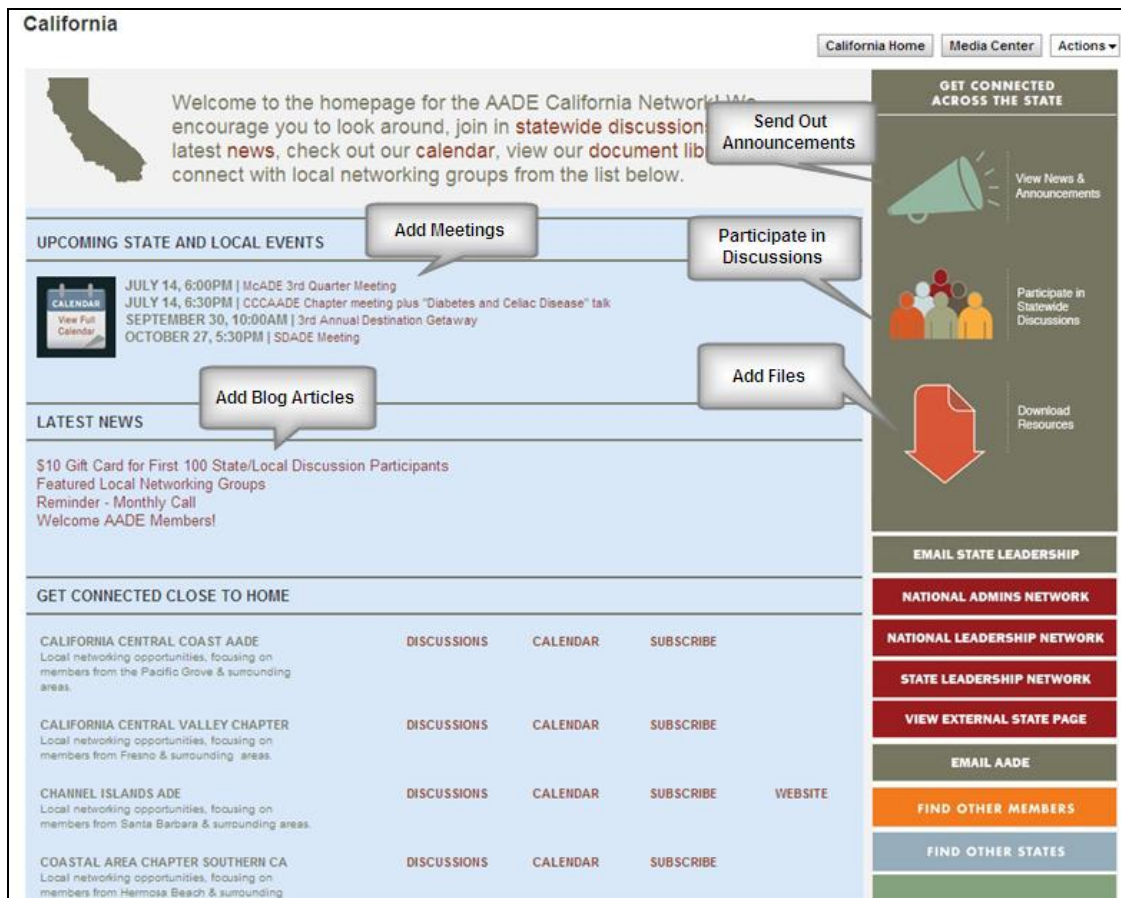


Figure 1: State Network Page

To access your State Network Page:

1. Click the My State Network menu bar item from the menu that displays at the top of all windows.

Blogs

Blogs are considered the latest news and updates that you see listed on your State Network pages. Similar to news stories, blog articles can be used to communicate information about a specific topic. You may use your blog to illustrate expertise in your specific field, or to give reviews and opinions about what your State Network is doing.

Adding and Releasing a New Blog Article

To add a new blog article:

1. From your State Network page, click on any articles in the Latest News to open your State Blog. Navigate to the blog's homepage, by clicking the Home button in the About This Blog Box.
2. Once on the Blog's homepage, scroll over the Actions drop down and select Add Article. The Article window opens.
3. Enter the following:
 - **Subject:** Enter the title of the blog article.
 - **Article:** Enter the content of your blog article in the edit box.
 - **Teaser:** Enter the teaser that displays on your blog homepage, attracting readers to your article. If you prefer not to have a teaser, click the Copy first 300 characters to Teaser button. This will copy the first characters from your article to use as a teaser.
 - **Classification:** Select Classifications to be associated with the blog article, and then click the Add button. Classifications are similar to categories that are used elsewhere on the site.
 - **Tag(s):** Enter the tags, or keywords to be associated with the article. Enter the tag and then click the Add button. You can click the View Current Keywords button to view a listing of the tags being used by other bloggers on the site.
4. Click the OK button to save your article. Your blog window will open with a message instructing you to release the article. Click the Released button to change the status of your article to Released. It can now be seen by others viewing your blog.

NOTE: See the instructions below to release an article at a later time. Also, you must be an administrator or set up as a BLOG OWNER in order to release a blog article.

To release a blog article:

Blog articles are not automatically posted to the blog. In order for a blog to be posted it must be released. You can click the Release button after adding a new blog, or follow the instructions below.

1. From the Blog Homepage, scroll over the Actions drop down and select Articles List.
2. Unreleased blog articles will have a status of Created. Click on the title of the unreleased blog article.
3. Click the Released button to change the article status.

Announcement Lists

Announcement lists are special "one-way" lists designed for you to send information out to your members. These lists are security controlled and only allow your community admins to post to them, but are easy for members to subscribe to so that they can begin receiving information from your group.

Sending Information Out to Your Announcement List

You can send an email out to your announcement list in two ways: by using your own email client, or by using our online interface.

To post using your own email client:

2. Using your own email application, enter your email exactly as you would like it sent out to subscribed members. While this can include attachments, please be aware that if your total attachments are over 500K in size, they will automatically be turned into links and posted on the site for members to download.
3. Type in a subject as you normally would, and in the "To:" line, enter the email address for the announcement list. To find the email address for your list:
 - When viewing your Announcement Topic, from the State Network page.
 - You will see an About This Topic box, the email displays at the bottom of this box. This is the email address to use when sending to that list.
4. Send the email and it will automatically go out to all those subscribed.

To post using the online interface:

1. Log in to the website and open the State Network Page.
2. Click on the View News and Announcements icon at the top of the right sidebar.
3. A new window opens displaying the complete archive of your announcements. Click the Add Thread button.
4. Enter a subject, the complete message, and then attach any files you wish to send using the online interface.
5. Click the OK button to send the message to your list.

Forums

Forums are two-way communication lists, enabling members to ask questions of other members of your organization. These lists can be public, enabling any member to post questions and replies, or they can be private, enabling only your private members to post questions and replies. Forums enable users to participate online, or they can subscribe to them and receive emails as communications are sent out.

Forums are a great way to encourage discussion and communication between members. Depending on your setup, you may have one or more forums already set up for your community. Please contact a site administrator for questions about using or implementing forums.

Using Forums Online


Once a forum is set up, anyone that has access can log in and post questions and replies for others that have access to see that forum. Below are some quick instructions for members to start participating.

1. Open your State Network Page.
2. Click on the Participate in State Wide Discussions Icon in the middle of the right side bar. The Forum will open.
3. The forum window will display the complete archives for that forum. You can then click on any thread to see the discussions and post any replies you wish to make, or click the Post New Thread button to post a new question.

Telling Members How to Subscribe to Forums to use Offline

One of the benefits of using the site is that members can subscribe to an email version of your forum, and then receive and send questions and responses right from their own email client, without having to log in. Anything posted via email or online will automatically be sent to the member and any responses or questions they send will automatically be posted in the online archives. This gives your members the choice of how they would like to interact with your group.

To subscribe to a forum:

1. When Viewing a Forum look for the [] button in the About this Topic box. **OR** Look for the Subscribe link next to any LNG directly on the State Network Page.
2. The subscription will now display in your subscription list below. At this point you can change your delivery option. See the legend at the bottom of the window for more information on what will be sent to you.

File Libraries

File libraries are a place where you can store meeting minutes, white papers, project plans, or any other document you wish to share with members.

Adding Files to your File Library

Below are some quick instructions for administrators to start adding files.

To add files to your file library:

1. Open your State Network page.
2. Click on the Download Resources Icon. The File Library window will open.
3. You will see both Add File and Add Link to File buttons near the top of the window. The Add File option will actually post the file on the site for download. The Add Link to File option enables you to specify a URL for another website from which the file can be downloaded. This second option is very useful for copy-righted or security controlled content that you want to point your members to. Click the appropriate button and a window will open enabling you to add the file.
4. Complete the following:

- **Title.** Enter the title that should be posted for the file. This should be only a single line long and be descriptive enough for users to know what the file is. This field is required.
 - **Effective Date.** Enter the date on which the file becomes effective. This is an informational field only and defaults to today's date. This is useful for whitepapers and/or minutes so that you can post the date that the paper was released and/or the meeting was on. This field is required.
 - **Description.** Enter a full description of the file. Please provide as much detail as possible for users to better understand the contents of the file. This field is required.
 - **Owner.** Select the name of the group posting the file. This should always be set to your community, but is useful in cases where you are a member of multiple communities. This field is required.
 - **Categorization 1/2/3.** These fields control where the file is posted. The category and topic will control which file library it is posted in. You can then specify a sub-topic (if this field is being used), and what type of document it is. If you wish to cross-list this file into multiple areas, you can do so by expanding the Categorization 2 and Categorization 3 areas and specifying other topics where the file should reside. This field is required.
 - **File(s).** Click the Add button. Click the Browse button and find the file you wish to post from your local machine. When you have selected it, click the Open button and we will transfer the file to our servers. Please note that this may take a while depending on the size of the file and your connection speed. A progress bar will display as the file is loaded, and will show the name of the file after it has completed.
 - **Source Type.** This is the application that created the file.
 - **Download Options.** You can provide members three options to retrieve the file. Original Only enables users to only be able to download the actual file you posted. Original and PDF enables users to download your original file, and also make available a PDF version of the file for download (created by our system). PDF Only hides your original file and only makes the PDF version (created by our system) available for download.
 - **Add Button.** You can post multiple files into a single file library entry. To add more files to this entry, click the Add button and then follow the instructions from above to add additional files.
5. Click the OK button and the file will be available for download from the system.

Downloading Files from Your File Library

Once a file has been posted, anyone that has security access can view the information about it and download it. Below are some quick instructions for members to start downloading.

1. Open your State Network page.
2. Click on the Download Resources Icon. The File Library window will open.
3. You can click on a file name to see the details of that file.
4. While viewing the file information you will see a set of buttons that will enable you to download the file or have it sent to you. For more information, see the legend on the screen.

Meetings

Meetings display on your State Network page and provide an easy way for members to see various meetings/events/calls within your group.

To create a meeting:

1. Open your State Network page.
2. Scroll over the Actions drop down and click 'Add Meeting'. The Add Meeting window opens.
3. Enter in the information that you see on the form. You will see various options regarding your meeting information.

4. If you click the Accept button, the event will be saved and notifications will be sent to appropriate members (see the text on the screen for who will be notified). If you click the Accept Do Not Notify button, the event will be saved, but no one will be notified.

Links

Links is an area of your state network page where you can reference websites and pages that may be of interest to your members. Links can only be added and edited by the primary community contact or a private member that has been granted admin privileges.

To create and modify links:

1. Open your State Network page.
2. Scroll over the Actions drop down and then click the 'Edit Links' option. The Links window opens.
3. Enter a Title and a URL for the link. If only private members should see the link, click the Private check box.
4. You can use the arrows on the left-hand side to move links up and down in the list.
5. You can click the + button to add another line for a link.
6. You can click the X button to delete a link.
7. Click the OK button to store your changes.

YOUR STATE'S PUBLIC PAGE

The Public Page allows you as a State Network leader to give non-members a peek into what you are doing as a State. This encourages them to join AADE and start participating in the State Network. Your external page looks very similar to your internal page and is designed to automatically pull content from your internal page and display it for non-members.



The three main features that are externally available are:

1. Your state's Latest News. This section is also referred to as a "blog". Any blog articles will be made publically available for members without a login.
2. Your state's calendar. Any meetings that you set up as public will display on the outside of the website.
3. Your state's links. If you make your links publically available, they will be accessible externally.

You can view what shows up on your external page by clicking on the red "View External Page" button in the right column of the State Network page.

To determine which page elements are displayed on your public State Network page:

1. From the State Network Page, scroll over the Actions drop down and select Community Administration.
2. Click on the Community Group Profile tab.
3. Click the Edit Group Profile link. The edit profile window opens.
4. There are two checkboxes that determine what appears on your public State Network Page. Check or uncheck the box depending if you want the page element displayed on the public page.
 - Show Blog on Public Page
 - Show Links on Public Page
5. Click Ok.

Publicity

GENERAL GUIDELINES

Obtaining publicity for your LNG will take time and effort, but it's often worth it. Publicity will help you achieve your membership objectives as well as increase community awareness of the roles and functions of the diabetes educator.

Suggestions for utilizing media include advertising your LNG meetings in the meetings section of your local or community newspaper and contacting the medical or health reporter about local/regional conferences. It's important to build ongoing relationships with your local media. Offer to be a resource to them and, in time, they will learn to look to you for diabetes-related expertise.

Recommending an expert from your LNG to address a diabetes self-management training or reimbursement issue during National Diabetes Education Week in November is another idea. You may want to also consider collaborating publicity efforts with the local ADA affiliate during National Diabetes Month in November.

Some small or new publications may be willing to print an article of local interest if you provide them with one that will not require much, if any, editing. Group photos from local meetings can also be submitted with the articles. In order to get the greatest exposure in your local media outlet, remember that the job of any journalist is to bring out news of interest to the public, especially the local public. Nothing is going to be published or aired just because it's important to you. Show your contact how stories about diabetes self-management training relate to something of interest to the community.

MEDIA LIST PREPARATION

A good starting place for developing an ongoing publicity effort is to prepare a list of local media outlets. The AADE Web site will be the simplest and most convenient way to identify the newspapers, radio and television stations, and magazines in your area. Go to the "Policy & Advocacy" portion of the AADE Web site. Select "Advocacy Action Center" then "Find Media Contacts" under Policy Tools and follow the instructions. Once identified, call the media outlet to determine who prepares events calendars and which writers may be interested in healthcare topics.

PRESS RELEASES

Distribute news of your LNG or state-wide activities in the form of a press release to all print media. Form is important because your release has a lot of competition from other news sources when it reaches the editor's desk. Your story must be complete and accurate. Be meticulous about correct spelling of names.

Send public service announcements to the public affairs director of television and radio stations. If possible, send a slide with a television announcement that can be put on the screen while the message is read. A suggested slide would include AADE's logo and a phone number to call for more information. Your local camera shop can probably prepare enough slides for each television station. Send both a 10-second and a 30-second version of the announcement along with the slide.

For additional questions or ideas about how to generate publicity, contact AADE's Director of Communications, Diana Pihos, at 312.601.4864, or dpihos@aadenet.org.

Sample Press Release to Announce an AADE Local or State-wide Event

For Immediate Release
(Date Mailed)

Contact: (Your Name)
(Your Phone Number and Email Address)

Local Diabetes Educators Promote Self-Management Awareness

(City) – A seminar entitled, “Self-Management Matters: Team Up with a Diabetes Educator,” is being offered by (add your LNG name here) a local networking group of the American Association of Diabetes Educators (AADE) in an effort to increase awareness about the role of the diabetes educator and the possibilities for a healthier lifestyle with diabetes. People with diabetes and their families are encouraged to attend.

The seminar, sponsored by the (your LNG name), will be held on (date) at (place) from (time). (Add sentence about materials, fees, featured speakers and their credentials, refreshments, parking, etc).

Diabetes educators are multidisciplinary healthcare professionals, including nurses, dietitians, pharmacists, physicians, social workers and exercise physiologists. More the 23 million Americans live with diabetes and efforts to prevent or delay the onset of serious complications associated with the disease are led by diabetes educators across the county. This proactive approach to diabetes management can greatly improve the quality of life for people with diabetes, not to mention the long-term healthcare cost savings.

For more information on attending the seminar, or to learn more about diabetes education, contact (your name) at (your phone number or email address).

Organizational Mentoring

Mentoring Process

Mentoring Activities provide guidance and assistance to existing CBs and LNGs that ask for assistance as well as developing groups. Through the sharing of ideas and experiences, mentoring provides an opportunity to improve leadership skills and enhance further growth.

New Groups

New groups will continue to receive mentoring during their first year of existence by a member of their CB in conjunction with other LNG leaders as appropriate.

Existing Groups

A leader of an existing CB or LNG can contact the CLA facilitator to define a problem who will in turn match the requestor with a CLA member or other leader..

Guidance and suggestions can be given but not limited to the following areas:

- Initiate contact with leaders of the LNG or CB for single on ongoing conversation
- Discuss/provide a guidance and suggestions for:
 - Defining purpose and function of meetings
 - Maintaining communication with local membership and the National Office
 - Planning for educational offerings
 - Exploring ideas and sharing experiences to increase and/or retain members
 - Fundraising
 - Increasing visibility of diabetes educators in the community
 - Developing program budget

Inactivation/ Reactivation of LNGs

AADE's CB/LNG model eliminates the need for most criteria that in the past chapters have struggled with and provides supports that ease administrative work and increase efficiency.

As the CB is not a formal organization but a leadership team, there is no cause for inactivation. It is the role of AADE to ensure CBs are successful and meeting the needs to their members. AADE will monitor activity and progress throughout the year. If concerns are expressed, AADE staff will investigate and request assistance from the MAC. AADE will bear the responsibility for assuring that there is an active CB for each state.

The model does allow for the easy start-up and sunset for LNGs. This means that LNGs can form and dissolve as AADE members needs and interests grow and wane.

It is largely the role of the CB to ensure LNGs are successful, to encourage and mentor new LNGs and to sunset LNGs as appropriate. To that end:

- The CB will monitor activity and progress throughout the year.
- Annually, they will assess LNGs to determine if the group is still active. If there is concern, they will poll the LNG participants and decide to keep open or close.
- Should a LNG wish to shut down, its leaders should simply poll the LNG participants for interest in continuing. If no leader emerges, send a request to the CB to remove the LNG from the page and notify members of other options.

Advocacy

OVERVIEW

AADE is committed to providing diabetes educators and people with diabetes a voice in Washington and in the state capitals.

The AADE Grassroots Advocacy program is responsible for maintaining a national network of diabetes educators to support activities that affect persons with diabetes and public policy related to diabetes education and care.

The AADE Board of Directors and Chief Advocacy Officer determine the Association's advocacy agenda and keep a close-watch on the happenings in Washington and raises awareness among our membership of legislative and regulatory proposals that affect diabetes educators and their patients.

AADE's Policy and Advocacy goals include:

- Attaining and maintaining reasonable reimbursement for diabetes educators.
- Ensuring that people with diabetes receive the healthcare coverage they need.
- Supporting programs and initiatives that detect diabetes or serve to prevent more people from developing the disease.

ADVOCACY TIPS

The following tips when are offered to assist you with communicating with legislators and their staff:

All politics are local politics. Even if you are talking about a national bill or a statewide initiative, personalize it for the individuals you are targeting in your communication.

Know your audience. Your communication, whether it be written or verbal, should address the issues and needs of your target audience. Examples are: media packets should be informational covering the groups they play to, such as information about the burden of diabetes in Hispanics for a Spanish speaking radio station or information about the burden of diabetes in African Americans for a African American Community newspaper.

Create coalitions. Partner with groups who have shared interests where the impact of the combined efforts of many is more than each group alone.

Keep it concise. Any written materials should contain the needed information but not excess amounts.

Keep it simple. Address the topics the audience will want to know about and explain it in a language they will understand. Avoid using jargon and explain any technical terms.

Make it compelling. Tell your story so that the human impact is understood in a way that changes the way the listener thinks about the problem. One way is to do this is to tell an individual or family's story that exemplifies the statistics you is presenting.

Include a call to action. Be specific about what you want from the communication and give specific directions to the listener about what you want him or her to do and how to do it. Make it easy by giving them the phone numbers, fax numbers, addresses and even sample letters or communications for them to send.

Pack 'em in. The presence of a large number of constituents in meetings has a great influence on a legislator's attitude about an issue. Written communications, phone calls and faxes are equally as effective.

Follow-up, follow-up, follow-up. Follow-up on your communication with the target audience to address any questions or concerns and to evaluate whether the desired communication has been delivered. Frequent communication with legislators is very effective in getting their attention focused on your issue. Use phone calls, faxes, or mail on a regular basis to get their attention.

Create recognition. An example of a communication plan using a consistent theme is the program used by the New Mexico legislative coalition between the Diabetes Control Program, American Diabetes Association New Mexico Affiliate and the American Association of Diabetes Educators Chapter, ZADE. They started with a diabetes alert based on paper dolls for diabetes.

They printed up thousands of construction paper dolls with spaces for patients to write in a message: "this is how diabetes affects me", and a place for their name and town, On diabetes alert day, they had a booth performing screenings and volunteers with paper dolls connected by a rope completely lining the walks and interior of the state capitol. The next year, when they lobbied for increases in funding for the Diabetes Control Program, the legislators had paper dolls delivered to their offices from people in their area. The paper doll theme was used in subsequent years for additional campaigns for diabetes legislation and is the hallmark of their campaign for the diabetes education and supplies legislation, which at this writing has a very good chance of sailing through the legislature.

Beware of black holes. You may do everything right and get your legislative action plan in place but because of the 'black holes' of political realities, the initiative fails. Examples include:

- Governor vetoes the bill.
- Sabotage by special interest groups with competing agendas.
- Fiscal realities-lack of support from state agencies analyzing the bill.
- Other groups who block any legislation with mandates.
- Paybacks and political favors.

Advocacy can be very rewarding, but it takes time and patience. If your first efforts don't result in the desired outcome, keep trying. Most of the time it takes more than one try with legislative changes. Build on the successes from your first effort and expand your campaign on the second try. Use communication graphics repeatedly so that your group becomes associated with a logo or communication style.

Remember, your campaign may be successful in communicating to your desired audience and yet, not achieve the outcome... but don't give up.

COMMUNICATING WITH LEGISLATORS

Tips on Telephoning Your State or Congressional Representatives

To find your representative's phone number, you may use AADE's searchable online congressional directory located in the Legislative Action Center or State Legislative Action Center. Each of these tools is found on the Advocacy web page.

This information can also be found by telephoning the U.S. Capitol Switchboard at (202)224-3121 and ask for your senator's and/or representative's office. The telephone numbers for your state representative are usually found in the "state government" listings of your local telephone directory. Another resource for identifying your elected officials is your local county or city Board of Elections.

Remember that telephone calls are often taken by a staff member, not the member of Congress. Ask to speak with the aide who handles the issue to which you wish to comment. After identifying yourself, tell the aide you would like to leave a brief message, such as: "Please tell Senator/Representative (Name) that I support/oppose (S. ___/H.R. ___)." You will also want to state reasons for your support or opposition to the bill. Ask for your senator's or representative's position on the bill. You may also request a written response to your telephone call.

Tips on Writing Congress or State Legislature

The letter is the most popular choice of communication with a congressional or state legislative office. If you decide to write a letter, this list of helpful suggestions will improve the effectiveness of the letter:

1. Your purpose for writing should be stated in the first paragraph of the letter. If your letter pertains to a specific piece of legislation, identify it accordingly, e.g., House bill: H. R. ____, Senate bill: S. ____.
2. Be courteous, to the point, and include key information, using examples to support your position.
3. Address only one issue in each letter; and, if possible, keep the letter to one page.

Addressing Correspondence:

The addresses for letters to Congress are:

To a Senator:	To a Representative:
The Honorable (full name)	The Honorable (full name)
United States Senate	US House of Representatives
Washington, DC 20510	Washington, DC 20515
Dear Senator:	Dear Representative:

Note: When writing to the Chair of a Committee or the Speaker of the House, it is proper to address them as: Dear Mr. Chairman or Madam Chairwoman; or, Dear Mr. Speaker:

TIPS ON E-MAILING CONGRESS OR THE STATE LEGISLATURE

Generally, the same guidelines apply as with writing letters to a legislative office. You may find and e-mail your representatives directly from the Legislative Action Center or State Legislative Action Center. Each of these tools is found on the Government Relations web page at http://www.aadenet.org/gov_frame.html.

Visiting Capitol Hill or Your State Capitol

Meeting with a member of Congress, state legislator or congressional/legislative staff is a very effective way to convey a message about a specific legislative issue. Below are some suggestions to consider when planning a visit to a congressional or legislative office.

Plan Your Visit Carefully:

Be clear about what it is you want to achieve; determine in advance which member or committee staff you need to meet with to achieve your purpose.

Make an Appointment:

When attempting to meet with a member, contact the Appointment Secretary/Scheduler. Explain your purpose and who you represent. It is easier for congressional and legislative staff to arrange a meeting if they know what you wish to discuss and your relationship to the area or interests represented by the member.

Be Prompt and Patient:

When it is time to meet with a member, be punctual and be patient. It is not uncommon for a member of Congress or the state legislature to be late, or to have a meeting interrupted, due to the member's crowded schedule. If interruptions do occur, be flexible. When the opportunity presents itself, continue your meeting with a member's staff.

Be Prepared:

Whenever possible, bring to the meeting information and materials supporting your position. Members are required to take positions on many different issues. In some instances, a member may lack important details about the pros and cons of a particular matter. It is therefore helpful to share with the member information and examples that demonstrate clearly the impact or benefits associated with a particular issue or piece of legislation.

Be Political:

Members of Congress or the state legislature want to represent the best interests of their district or state. Wherever possible, demonstrate the connection between what you are requesting and the interests of the member's constituency. If possible, describe for the member how you or your group can be of assistance to him/her. Where it is appropriate, remember to ask for a commitment.

Be Responsive:

Be prepared to answer questions or provide additional information, in the event the member expresses interest or asks questions. Follow up the meeting with a thank you letter that outlines the different points covered during the meeting, and send along any additional information and materials requested.

THE LEGISLATIVE PROCESS...

or How a Bill Becomes a Law

Anyone may draft a bill; however, only members of Congress or the state legislature can introduce legislation, and by doing so become the sponsor(s). There are four basic types of legislation in Congress: bills, joint resolutions, concurrent resolutions, and simple resolutions. In the states, there can be some minor variations in their titles, but "bills" is almost universally acceptable to describe legislation.

The official legislative process begins when a bill or resolution is numbered. In Congress "H.R." signifies a House bill and "S." a Senate bill, referred to a committee and printed by the Government Printing Office. In the states, there can be some minor variations in their process but bills are usually numbered by the clerk of the legislative body and printed by a legislative printing office.

Step 1. Referral to Committee: With few exceptions, bills are referred to standing committees in the House or Senate according to carefully delineated rules of procedure.

Step 2. Committee Action: When a bill reaches a committee it is placed on the committee's calendar. A bill can be referred to a subcommittee or considered by the committee as a whole. It is at this point that a bill is examined carefully and its chances for passage are determined. If the committee does not act on a bill, it is the equivalent of killing it.

Step 3. Subcommittee Review: Often, bills are referred to a subcommittee for study and hearings. Hearings provide the opportunity to put on the record the views of the executive branch, experts, other public officials, supporters and opponents of the legislation. Testimony can be given in person or submitted as a written statement.

Step 4. Mark Up: When the hearings are completed, the subcommittee may meet to "mark up" the bill, that is, make changes and amendments prior to recommending the bill to the full committee. If a subcommittee votes not to report legislation to the full committee, the bill dies.

Step 5. Committee Action to Report A Bill: After receiving a subcommittee's report on a bill, the full committee can conduct further study and hearings, or it can vote on the subcommittee's recommendations and any proposed amendments. The full committee then votes on its recommendation to the House or Senate. This procedure is called "ordering a bill reported."

Step 6. Publication of a Written Report: After a committee votes to have a bill reported, the committee chairman instructs staff to prepare a written report on the bill. This report describes the intent and scope of the legislation, impact on existing laws and

programs, position of the executive branch, and views of dissenting members of the committee.

Step 7. Scheduling Floor Action: After a bill is reported back to the chamber where it originated, it is placed in chronological order on the calendar. In the House there are several different legislative calendars, and the Speaker and majority leader largely determine if, when, and in what order bills come up. In the Senate there is only one legislative calendar.

Step 8. Debate: When a bill reaches the floor of the House or Senate, there are rules or procedures governing the debate on legislation. These rules determine the conditions and amount of time allocated for general debate.

Step 9. Voting: After the debate and the approval of any amendments, the bill is passed or defeated by the members voting.

Step 10. Referral to Other Chamber: When a bill is passed by the House or the Senate committee and floor action. This chamber may approve the bill as received, reject it, ignore it, or change it.

Step 11. Conference Committee Action: If only minor changes are made to a bill by the other chamber, it is common for the legislation to go back to the first chamber for concurrence. However, when the actions of the other chamber significantly alter the bill, a conference committee is formed to reconcile the differences between the House and Senate versions. If the conferees are unable to reach agreement, the legislation dies. If agreement is reached, a conference report is prepared describing the committee members recommendations for changes. Both the House and the Senate must approve of the conference report.

Step 12. Final Actions: After a bill has been approved by both the House and Senate in identical form, it is sent to the President. If the President approves of the legislation he signs it and it becomes law. Or, the President can take no action for ten days, while Congress is in session, and it automatically becomes law. If the President opposes the bill he can veto it; or, if he takes no action after the Congress has adjourned its second session, it is a "pocket veto" and the legislation dies.

Step 13. Overriding a Veto: If the President vetoes a bill, Congress may attempt to "override the veto." This requires a two-thirds roll call vote of the members who are present in sufficient numbers for a quorum.

For more information on these tips or other advocacy questions, please contact **James Specker**, AADE Advocacy Specialist at 800/338-3633 ext. 4873 or jspecker@aadenet.org.

Appendix

Please see AADE's website (www.diabeteseducator.org) for a complete listing of:

- AADE Board of Directors
- Coordinating Bodies

Also visit MY AADE NETWORK's [Nationwide Leaders Network](#) for:

- Electronic versions of this document and attachments
- Electronic copies of all required forms
- Group Discussions & Resources
- Video & training materials for using
- MY AADE NETWORK

All forms may be returned to AADE via fax:
312-424-2427

Or by mail:
AADE attn: Volunteer Services
200 West Madison St.
Suite 800
Chicago, IL 60606

KEY DOCUMENTS

- MY AADE NETWORK Transition Checklist
- Letter of Understanding
- Chapter/LNG Corporate Card User Agreement
- Coordinating Body Charter
- Project/Event Proposal
- Expense Report (Attached)
- Social Media Toolkit (Attached)
- AADE Identity Standards (Attached)

MY AADE NETWORK TRANSITION CHECK LIST

The first step is to select a Transition Team to carry-out the activities required to become part of the MY AADE NETWORK. Once the team is formed, the following items need to be completed to finalize your transition. These are not necessarily presented in order as some items will take additional time.

Transitioning Steps:

- Submit a List of individuals on the Transition Team including full name, credential, preferred mailing address, work and home phone numbers, fax number and e-mail
-

- Submit signed Coordinating Body Charter
-

- Submit a List of Local Networking Groups to be recognized (this reflects chapters transitioning into LNGs) & Key Contact for each (including contact information)
-

- Submit the name(s) of individuals who will serve as web administrators (and therefore need to be trained)
-

If you have chapters incorporated:

- Complete paperwork to dissolve (unique to each state; will need to take care of any corporate business that may have been neglected, including the filing of any state corporate documents and federal tax documents that may have been required for prior years)
-

For chapters who have been covered under the AADE Group Exemption & Have an EIN Number:

- Prepare & send to John Tyler (jtyler@aadenet.org) a Final Financial Statement and bank statements.
- File Final Tax Return, pending specific IRS requirements (AADE staff)
- Request IRS to retire Chapter Taxpayer Identification Number (TIN) (also known as a Federal Employer Identification Number (FEIN))

* Note AADE staff will assist chapters with these steps; contact Pati Mangano, 800/338-3633 x4822 or pmangano@aadenet.org for assistance and information.

- Send chapter's permanent files, financial statements and records for the past seven years to be stored by AADE. Contact John Tyler (jtyler@aadenet.org) for shipper information.
-

- Complete paperwork to register within the state as required by state
-

- Submit from each Chapter a full membership list (that includes any local-only members), with all data fields (preferably in electronic form)
-

- Complete Transfer of Funds (transferred by check or wire to AADE); note, AADE will work this Chapters on Certificates of Deposit that mature after the transition date
-

- Close current bank accounts once all transactions are complete
-

- Transfer of all Existing Records to AADE for storage
-

Creating the New Structure:

- Complete Re-branding (naming) by determining the naming for the state & LNGs
-

- Confirm the parameters for the Coordinating Body Leadership Team (based on the CB documents provided), set plan to select and install the first team
-

- Complete training and Set-up the State Community Page
-

- Develop (and share with AADE) state-wide activity plan
-

- Invite all members within the state to join the new Network & log-on to the State Community Page
-

Please submit completed application and documents to:

American Association of Diabetes Educators
Attention: Pati Mangano
200 W. Madison Street Suite 800
Chicago, IL 60606
pmangano@aadenet.org
800/338-3633 x 4822

Chapter (LNG) Letter of Understanding/ Chapter Funds Transfer Form

The _____
chapter of the American Association of Diabetes Educators agrees to become part of MY
AADE NETWORK.

As a duly authorized representative of the _____ chapter, I affirm that the
officers of said chapter will be forwarding the chapter fund balance of \$_____ to
AADE by _____ (date) to establish a LNG “credit card”.

In return, AADE confirms that: the funds will be used solely as directed by the chapter
(local networking group*).

The Chapter (LNG) funds balance will be designated / earmarked within the CB’s fund
balance.

Name: _____ (elected
officer)

Title: _____

Chapter: _____

Name of
Designated
Cardholder: _____

*The Designated Cardholder will be provided a “corporate card user information form”
before the card is issued.

Date: _____

AADE
Acknowledgement: _____

Title: _____

Date: _____

*The LNG will be provided a “credit card” to access the funds (up to the balance of
unused funds).

AADE - Coordinating Body Charter

This Document provides a non-exclusive charter to be a Coordinating Body of AADE to those members residing within the geographic territory referred to as [insert area]. The Charter is made on behalf of AADE members and shall stay in effect as long as it serves the members, furthers the goals and vision set forth in the *Principles of Affiliation and Operating Framework* and all requisite legal and financial obligations are met.

The purpose of this Charter is to set forth the specific roles and responsibilities of AADE leadership and staff and AADE members in their served territory of the MY AADE NETWORK.

Membership.

All members of AADE will be members of the MY AADE NETWORK in their respective area, and all local members are members of AADE. Membership criteria and categories will be set forth by the AADE Board.

Obligations of AADE.

AADE's obligations under this charter shall include:

- A. Fulfill financial responsibilities including banking, accounting and all reporting requirements specified by the IRS and as otherwise may be consistent with sound accounting and audit practices;
- B. Determine and procure a risk management program with the attendant insurance policies as part of an overall risk management practice, including general liability, property insurance, and directors' and officers' liability insurance;
- C. Provide a non-exclusive, non-transferable license to use AADE's trademarked name and logo per the conditions listed in the Member Network Leadership Guide. AADE staff will provide requirements and assist groups in the use of the organization's branding and intellectual property rights;
- D. Authorize the use of the name " [insert full name of AADE] ," acronym " [insert acronym of AADE] ," and logo of AADE in a manner consistent with AADE's branding policy for use with group materials that also feature the group's name, acronym and logo;
- E. Maintain and provide data and relevant information on members and prospects for the Coordinating Body and its Local Networking Groups;
- F. Maintain a web-based data management system, member community, communications portal and event planning and registration system for use by the Coordinating Body and its Local Networking Groups;
- G. Provide on-going recruitment, training and development for all volunteers to include a combination of education, training, mentoring, and resources.
- H. Provide support services on a contracted basis.

Obligations of Coordinating Body.

The Coordinating Body’s obligations under this charter shall include:

- A. Operate in accordance with AADE’s Bylaws;
- B. Operate in compliance with all appropriate laws and regulations governing associations on the federal, state and local level;
- C. Comply with the sound internal control policies, risk management policies and other policies outlined in the Member Network Leadership Guide provided by AADE, as it may be amended from time to time;
- D. Sponsor and conduct programs and activities that further the purposes and objectives of AADE and meet the needs of members as identified in regular member surveys and research.
- E. Encourage formation of Local Networking Groups and support and coordinate their activities in the territory.
- F. Assist in maintaining the shared membership data and relevant information.

Revenue Opportunities and Financial Participation.

- A. AADE will handle the financial responsibilities for each Coordinating Body and provide timely reports on monies collected, dispersed and available.
- B. AADE will allocate to the Coordinating Body a portion of the dues collected from members within its region.
- C. The Coordinating Body in return will be responsible for how money is allocated and spent within its region.

Intellectual Property and Confidential Information.

- A. The AADE logo must be used by Coordinating Bodies, and their recognized Local Networking Groups, chartered by the national organization on stationery, educational programs, literature, and Web sites, and others, as per the conditions stated in the MY AADE NETWORK Leadership Guide. The AADE logo should have more prominent placement and may not be used in combination with any other logo(s). Any other use requires permission and a written request with a sample of the proposed usage. All group name will use AADE or the full name, American Association of Diabetes Educators, in conjunction with geographic designation.
- B. To protect members’ privacy rights and expectations, all leaders agree to protect the confidentiality of the records in the database and shall not sell trade, transmit, or otherwise disseminate records, in whole or in part, to any third party without AADE’s and the individual’s express prior written approval.

Presented to AADE Members of MY AADE NETWORK of *(state)* _____ through the coordinating body under the chair *(name)* _____ on *(date)* _____.

Signed: _____, AADE president

American Association of Diabetes Educators

Project/Event Proposal

Please note that funds will not be reimbursed if this form is not completed.

State Coordinating Body

Local Networking Group

Expenses	Projected Expenses	Actual Expenses
Travel/Event Committee		
Event Venue		
AV Rental		
Catering/Meals		
Speaker(s)		
Marketing/Onsite Materials		
Postage/Shipping		
Printing		
Supplies		
*Other		

Estimated Revenue from Attendees \$ _____

Estimated Expenses \$ _____

Estimated Profit \$ _____

Please Explain Other Expenses:

Approval for Reimbursement for Expenses

Date Submitted: _____

CB Coordinator Signature _____ Date: _____

LNG Representative Signature _____ Date: _____

Authorized Signers: 1. _____

2. _____

Please Fax Completed Form to: Pati Mangano 312-424-2427 or e-mail to pmangano@adenet.org

Chapter/LNG Corporate Card User Agreement

Upon transfer of chapter funds to AADE, the LNG will name an AADE Volunteer to manage LNG funds via a declining balance corporate card. AADE will issue the card in the volunteer’s name. The volunteer will represent the AADE/LNG membership and conduct business using the corporate card under the Principles of Affiliation.

When the LNG balance is exhausted, financial transactions will occur on the CB level.

Cardholders agree to:

- Use the corporate card only while conducting LNG-AADE business
 - Not use the card for personal expenses
 - Maintain fiduciary responsibility for LNG funds
- Only charge authorized expenses
 - Obtain authorization from the Director of Volunteer Services in writing (email) prior to charging expenses not within an approved expense category (refer to P&P)
- Reconcile all charges with the AADE within 10 days of the cycle ending date
 - Cardholders will access their account on-line
 - Submit itemized receipts for all charges to AADE Accounts Payable Department
 - Document purpose of all charges
 - Document persons for all food and beverage charges (per IRS regulation)
- Protest inaccurate charges within 10 days of the cycle ending date
 - Protest un-authorized charges directly with the corporate card customer service hotline
 - Cardholders must also notify AADE of un-authorized charges

AADE will:

- Manage the corporate account and maintain fiduciary responsibility for LNG funds
- Reconcile receipts and documentation
- Communicate with card members if an account is out of compliance with this agreement

AADE will suspend any account that remains out of compliance for more than 30 days and upon authorization of the CEO or CFO.

Chapter/LNG Name: _____

Cardholder Signature _____ Date _____

Printed Name _____



Issuer of Card _____ Date _____

(Office Use Only)

Chapter/LNG Corporate Card User Agreement

Chapter/LNG Name: _____

The following cardholder information must be submitted directly to AADE's Controller, Natalie Rinard via fax at 312-424-2427:

Card Holder Legal Name: _____

Last 4 Digits of your SS Number: _____

Date of Birth: _____

Security code (4 characters that the applicant can remember) _____

Home Phone: _____

Business Phone: _____

E-mail Address: _____

Home Address: _____

City: _____

State: _____ Zip: _____

**Page 2 – please complete and return both pages of this document to:
Natalie Rinard – (fax) 312-424-2427
Phone – 800-338-3633 x 4828
nrinard@aadenet.org**