



## Holding a successful first meeting

You've made your first foray into starting an ACDIS local chapter. You've made contacts, and people are interested. Now you need to set a time and location for an initial get-together. First, get permission from your own facility or find a volunteer to host the first meeting, or choose your virtual event platform. Sometimes a technical college or hospital association may be willing to share meeting room space, too. Pick a time convenient for you and your co-volunteers.

Alternatively, send an e-mail to your new colleagues and ask for volunteers and votes for convenient days and times. Be forewarned, however, such a democratic approach takes a little bit of additional time. You'll never please everyone but with enough advanced warning, people can request time off, or set aside time to attend the meeting.

Once you've established your chapter, consider setting an annual calendar so members know what to expect and can plan their year accordingly. At a minimum, members should be informed of upcoming meetings at least one month in advance.

### Advertise the meeting

Consider drafting a flyer with the meeting date, time, location, contact, and possible agenda to post at area hospitals. Send it to ACDIS national and other professional organizations, too. Local chapter leaders should also leverage their own virtual resources and network to advertise the event. This may mean posting it on the leader's LinkedIn page or other social media platform. Inviting local medical and nursing students to the meeting will also help further CDI's cause down the road by exposing the next generation of clinicians to CDI work early.

As a reminder, ACDIS posts meeting information on its [website](#) and in its e-newsletter *CDI Strategies*. To add a meeting, fill out the [Official Local Chapter Request Form](#). A member of the ACDIS national team will update the website and list in *CDI Strategies* on a weekly basis.

### Welcoming CDI peers at in-person meetings

Ask for volunteers and identify roles and responsibilities for them. This may sound too formal, but for in-person events, it's a good idea for the host to pick someone to be the official greeter, someone to take notes, and someone to run the meeting. This alleviates the pressure on any one volunteer and helps the meetings run a bit smoother.

The official greeter should direct participants to a table with a sign-in form and blank name tags. Name tags foster easier conversation and recognition. You may have "spoken" over email but have never seen one another. Name tags take the guess work out generating relationships.

- ⑤ **Tip:** To avoid additional hassles for the hosts, leave the name tags blank and let participants fill in their names as they wish.

Rather than using a sign-in sheet, consider using a laptop open to the [Online ACDIS Local Chapter Roster](#). If you do use a paper sign-in sheet:

- ⑤ You may want to print out two or more sign-up sheets to avoid any traffic jams at the doorway.
- ⑤ Be sure to input any handwritten data back into the Online ACDIS Local Chapter Roster as quickly after the meeting as possible.



- ⑤ Ask meeting attendees to update their existing information and mark off individuals who are no longer with their organization or involved in CDI efforts.

### Welcoming CDI peers at virtual meetings

Ask for volunteers to join the leadership team to handle the various components of the virtual meeting, including:

- ⑤ Maintaining the list of participants
- ⑤ Creating the invitation at least a month in advance
- ⑤ Recruiting speakers and obtaining their information for submission to ACDIS (if CEUs are being requested)
- ⑤ Operating the background functions needed during the meeting (recording, monitoring the chat, controlling the slides if desired by the speaker, making announcements at the beginning)
- ⑤ Following up with attendees after the meeting by pulling an attendance report and issuing the approved CEU (if applicable)

Ongoing recruitment for roles specific to your chapter's needs, and for the particular meeting's needs, also helps encourage members to invest in the chapter rather than just participate. Consider hosting open forum format meetings in between regularly scheduled meetings to facilitate open conversation and information sharing on topics related to the practice of CDI. This should be facilitated by someone who has been designated to lead it and they should prepare information ahead of time to guide the discussion. Skilled management of virtual meetings are the key to success in terms of perception of professionalism, invested participation, recruitment of speakers, and growth of the chapter.

For more advice related to virtual meetings, please download the "Virtual meeting guide" document from the Leadership Toolkit.

### Extend introductions

First meetings generally reflect an air of informality. Foster that feeling. Spend the bulk of the time letting people get to know one another. For virtual meetings, consider letting each attendee introduce themselves briefly to the group. Chapter leaders can set the tone by kicking off the introductions.

As local chapter participation grows, this may not always be possible. In the initial stages, however, this simple act makes people feel comfortable. During the "introduction" period you may want to ask participants to state:

- ⑤ Their facility
- ⑤ Their location
- ⑤ Their professional background
- ⑤ Their certifications
- ⑤ How long they have been a CDI professional
- ⑤ How old their CDI program is
- ⑤ At least one CDI-related problem area
- ⑤ At least one area of CDI-related success

This generates ideas for meetings as well as conversation and solutions. During subsequent meetings, you may want to leave about 15 minutes at the beginning of each meeting for people to say hello to each other. You may consider having a period of time to recognize newly credentialed professionals or students as well.



Consider incorporating various “icebreaker” agenda items such as who traveled farthest for in-person meetings, who has the most children or grandchildren, who is the newest to the CDI profession, etc. with prizes for the winners.

### Determine chapter structure

Everyone’s busy. How often your chapter meets should reflect the needs of attendees. You can meet as regularly or as infrequently as you need—monthly, bimonthly, quarterly, biannually, annually—it’s up to you and your membership. And feel free to change this as the local chapter’s needs changes. You may be excited to meet monthly when you first start but find by month six that a quarterly schedule better fits your needs.

### Organize meeting hosts

Some chapters rotate responsibility for hosting the meeting, establishing the discussion topic, and bringing snacks for in-person meetings.

- ⑤ **Tip:** Establish basic plans for the next meeting before you adjourn your first session. Ask for a volunteer and a tentative date. This helps keep the momentum going. Try not to leave the first event without a concrete plan for the subsequent one.
- ⑤ **Tip:** The host of the previous meeting should try to stay involved and help the next host as much as possible. This allows everyone to grow from the experience.
- ⑤ **Tip:** Discussion topics and length depend on the interest and needs of those in your group. You might consider best query practices one month and plan a presentation from a physician advisor or champion in the next. Use the Online ACDIS Local Chapter Roster to generate ideas.

### Have fun

Local meetings represent a way for you to reach out and help your fellow CDI professionals. Share what you’ve learning during your professional experiences and learn from others in the field, too.

- ⑤ **Tip:** Take a group photo either in-person, or via a screenshot during virtual on-camera meetings. ACDIS is a community, after all. Email the ACDIS team your photo and the names of attendees and we’ll post it ACDIS national’s social media pages to help generate interest. Photos can be sent to [info@acdis.org](mailto:info@acdis.org).
- ⑤ **Tip:** Make in-person meetings potluck. If your meeting is near lunch or dinner time, why not make it potluck and ask everyone to sign up to bring some small finger food or dessert. If your meeting is near a holiday, perhaps make some holiday-themed food.
- ⑤ **Tip:** Consider setting aside one meeting a year for “fun” presentations. This model can be especially fun during the annual CDI Week festivities in September.

### Sample first in-person meeting agenda

1. Have a sign-in sheet and name tags ready, if possible—10 minutes
2. Welcome everyone—2 minutes
3. Go around the room and have everyone introduce themselves by stating—15-20 minutes depending on the size of the group
  - a. Name
  - b. Facility
  - c. Role



- d. Number of years of involvement in CDI efforts
  - e. Recognize newly credentialed professionals and any students
4. Ask everyone to get up, stretch, and find a new seat next to someone they don't know—5 minutes
  5. Ask ACDIS national for complimentary on-demand webinar. Run the audio—1 hour (you may want to stop the audio before the Q&A portion depending on time/interest)
  6. Break/open discussion—15-20 minutes
  7. Reconvene
  8. Roundtable discussion. Ask everyone to explain something they are proud of regarding CDI efforts at their facility and something they hope to learn how to do better (The second question will help you with future topic ideas)—20 minutes
  9. Discussion of future meetings—15-30 minutes
    - a. Meeting frequency: quarterly, bi-annually, annually?
    - b. Day and length: Fridays? Saturdays? Some combination? 4-hour meetings? 2 hours?
    - c. Leadership: Pass around a sheet to get volunteers contact information. Obtain:
      - i. Name
      - ii. Facility name
      - iii. Telephone
      - iv. Email
      - v. Personal email or other personal contact (this is in case that volunteer changes jobs or has some family or other issue come up and you cannot reach them in the office)
      - vi. Next meeting: Pick a host and general date (December? January? Next month?) for the next meeting.
  10. Good luck getting everyone to go home! People generally linger for a while after the first meeting.