



ADVOCACY

June 29, 2012	CC: Chapter Presidents
	Programs & Services
<u>Nominations for the State Activism Council and the Federal Activism Council</u>	
<u>Action Requested/Deadline: July 27, 2012</u>	

Together, the National MS Society and MS Activists shape activism to create systems change to impact the greatest number of people possible. By aligning activism with opportunities and the Strategic Response, we magnify the Society’s impact and capitalize on resources. Currently, the **State Activism Council** and **Federal Activism Council** are both expanding membership to guide this systems change and seeking nominations.

Charge to the State Activism Council:

The State Activism Council provides direction on the Society’s state activism efforts by:

- Providing guidance related to state advocacy campaigns or positions that could have a national impact or be potentially controversial or divisive.
- Developing a platform of state policy issues to pursue in states across the country, leveraging momentum and expertise around the country in a focused manner.

Call for Nominations:

- The current call for nominations is for **volunteers** with expertise in health insurance; experience with utilization of accessible transportation, accessible housing and/or long-term supports and services; or younger persons with issues related to employment.
- The call for nominations for **staff** is for staff from the **East, Midwest and South Central Regions**

To learn more about the **State Activism Council** request for nominations, click [here](#). Use this [form](#) to submit nominations.

Charge to the Federal Activism Council:

To engage Society volunteers and staff to review federal public policy based on ideas generated by Chapters, the MS Coalition, and/or the home office.

Call for Nominations: The Federal Activism Council is seeking nominations of Society Staff and volunteers with experience in advocacy efforts at the state or federal level, excellent

communication skills, strategic thinking and analytical capability, a basic understanding of the federal legislative system and the ability to think ‘nationally’ about issues. We are seeking nominees as follows:

- Society Volunteers from the following regions: **Midwest, South Central, East**
- Military veterans (one slot designated)
- Four National MS Society Staff (including chapter and regional staff)

To learn more about the **Federal Activism Council** request for nominations, click [here](#); for nomination forms, click [here](#); and for information on the responsibilities of Council members, click [here](#).



ADVOCACY

June 29, 2012	CC: Chapter Presidents
	Programs & Services
<u>State Activism Council Issue Submission Process and Form</u>	
<u>Action Requested/Deadline: August 24, 2012</u>	

The Society’s investment in advocacy reflects our commitment to achieve policy changes that address underlying, systemic problems faced by people affected by MS. To align activism with opportunities (regardless of boundaries) and leverage resources and expertise to maximize results, the Society seeks to establish a common state-focused policy agenda that encourages state review, assessment, adoption and implementation. To create this agenda, MS Activists and Society staff are encouraged, though not required, to submit issues or opportunities for regional consideration and discussion, by Friday, August 24, to their Regional Liaisons for the Society’s “We are Activists” Strategic Response Implementation Team.

Following regional discussions that will occur between August 24 and September 7, two issues or opportunities, from each region, will be prioritized and advanced to the Society’s State Activism Council for consideration. Ultimately, from this regional outreach, review and prioritization, and in collaboration with the Society’s State Activism Council, the first-ever Society state-focused policy agenda will be established.

Use this [form](#) to solicit suggestions from others, or to submit your own for consideration as a potential Society-wide state legislative policy or regulatory priority. Please submit completed forms to your respective Regional Liaison Implementation Team members, by Friday, August 24 for consideration and discussion. Questions regarding the issue submission process or form can be directed to Renee Vandlik at Renee.Vandlik@nmss.org or 202-408-8112.

Northeast Region	Eugene Veigl
East Region	Melissa Slizewski
Southeast Region	Jenna Paladino
Midwest Region	Ruth Linnemann
South Central Region	Mireya Zapata
West Region	Jim Freeburg



CHAPTER PRESIDENTS

June 29, 2012	CC:
Chapter Manual Revision	

The Chapter Manual, (Revised May 2012) is posted on SharePoint under Chapter Management Information. The approved changes follow on subsequent pages. The changes reflect structural changes that have been made and previously communicated (NPE Policy revisions, NPE Exception Review Process, Direct Marketing) or written to achieve greater clarity (Home Office Budget and National Program Expense, and National Program Expense Allocation to Chapters).

There has also been one additional NPE policy modification with respect to the treatment of Charitable Gift Annuities that was approved by the Chapter Relations Committee of the National Board of Directors at its May 21st meeting.

Craig Weber
Vice President, Chapter Operations
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Chapter Manual, Part II: Planning and Budgeting

6. Home Office Budget and National Program Expense (NPE)

The total home office budget is determined through an inclusive budget planning process. A Budget Review Committee provides input to the CEO and is comprised of members of the Senior Leadership Team, members of the National Board of Directors and regional volunteer liaisons responsible for communicating with volunteer leadership in each region.

The home office budget provides for the following:

- Research
- Program, services and professional education
- Chapter support
- Advocacy

- Training of Society staff and volunteers
- Fundraising strategy development, training and materials
- Marketing and brand development
- Infrastructure (finance, IT, human resources, risk management, legal and insurance)
- Additional initiatives to meet the objectives of the Strategic Response 2011-15.

National Program Expense (NPE) is an allocated expense to chapters that funds a large portion of the home office budget. Other income sources for the home office budget include direct marketing, advertising, sponsorship income and investment income. Chapters receive NPE allocations as part of the Society budgeting process based on organizational priorities.

NPE is allocated to chapters based on historic revenue experience and progressive tiers. The percentages may change based on the Society's priorities, including the Strategic Response objectives. In addition, the tiers may be adjusted from time to time.

Once the total home office budget and the portion of it to be covered by NPE is finalized, the President & CEO presents the budget to the Finance Committee of the National Board and, ultimately, to the National Board of Directors for approval.

7. National Program Expense Allocation to Chapters:

Once the home office budget and total National Program Expense (NPE) have been approved by the National Board, NPE is allocated to chapters and communicated to them in writing:

- Each chapter's allocation is based on its average gross revenue (including benefit to donor and excluding in-kind, investment income and subsidies received from the home office) over the past two years of audited results.
- Revenue tiers with progressively higher percentages are used to determine the NPE allocation amount to chapter.

There is one exception to the NPE allocation process that does not require prior approval of the Chapter Relations Committee (CRC):

Treatment of Large Gifts: For any single donor gift exceeding \$100,000, a chapter has the following options:

- Treat the gift in the same manner as all other gifts. The current year NPE for the chapter would not be adjusted and, if the gift is designated by the donor for research, the transfer of the gift to the home office would offset the chapter's NPE obligation for the current year. The gift income would be included in the average revenue formula for future years in accordance with the normal NPE

- allocation process. With this option, the chapter should anticipate a higher NPE allocation in future years and should reserve funds for that purpose.
- Designate any portion of the gift as Honor Roll. The portion of the gift designated as Honor Roll would be excluded from the average gross revenue calculation for purposes of determining the NPE allocation in future years.

It is recommended that the Chapter President contact the REVP to discuss the chapter's options when it receives a gift of \$100,000 or larger. If the decision is to designate all or a portion of a gift exceeding \$100,000 as Honor Roll, the Chapter President must confirm the decision in writing to the Society's Chief Financial Officer (CFO).

In accordance with Generally Accepted Accounting Principles (GAAP), multi-year unconditional pledges are treated as revenue in the year that the pledge is received. Such pledges will be treated on a cash basis for the purposes of allocating NPE.

The Chapter's Annual Invoice is allocated into monthly payments based on the chapter's prior year cash flow. It may be adjusted during the annual budgeting process based on cash flow projections, subject to approval by the Society's CFO. Subsequent to the budgeting process, any changes in the schedule of payments must be approved by the REVP and the Society's CFO. Any revisions to the chapter's schedule of payments will be confirmed with a revised Annual Invoice.

8. National Program Expense Exception Review Process:

The Chapter Relations Committee (CRC) of the National Board of Directors is responsible for approving exceptions to policy, including exception requests related to the NPE allocation process. Instances of financial hardship are addressed through a separate process.

The NPE Exception Review Process is as follows:

- Concerns which might impact a chapter's NPE allocation may be identified at any time. The chapter president must first discuss a concern or circumstance with their REVP.
- When making an exception request:
 - The circumstance needs to be described in full and the request submitted in writing to the CRC.
 - The CRC will review the request and make a determination in writing.

The CRC has already determined that the following circumstances warrant review for possible exception to the NPE allocation process:

- 1) Targeted, one-time, research-restricted campaigns:** With prior CRC approval, a chapter may initiate a targeted one-time research-restricted campaign and may treat the aggregate total of gifts received as Honor Roll and thereby have the campaign gifts excluded from gross income for purposes of determining its future NPE allocation. This assumes that many, if not all, of the gifts would be

below the \$100,000 threshold for treatment of large gifts and that the Honor Roll amount would be in addition to the chapter's regular NPE allocation. Prior approval by the CRC is required. A proposal should first be discussed with the REVP and the Chief Research Officer

- 2) Locally Restricted campaigns:** A chapter may request an NPE exception from the CRC to exclude locally restricted campaign income from future NPE allocations. The request will be considered within the regular NPE exception review process. Factors considered will include, but are not limited to:
- a) Is the locally restricted funding from one source and significantly higher than the average locally restricted funding of all chapters?
 - b) Is the locally-restricted funding a material amount of the chapter's budgeted income?
 - c) Is the funding covering a program that is budgeted for each year, or does it cover a new, unbudgeted program with the expectation that the program will become part of the normal budget process in future years?
 - d) Is the restricted program in alignment with the priorities of the Society's Strategic Response?

An exception request should first be discussed with the chapter's REVP to determine whether it warrants further consideration.

Rental Income: A chapter may request an NPE exception from the CRC to exclude rental income, realized from sub-leasing excess space, from average gross revenue for purposes of determining future NPE allocations. If approved, the NPE exception would be effective for the remaining term of the lease or for as long as the sub-lease exists.

9. Assignment and Designation of Funds

f. Gifts in Wills, Trusts, Charitable Gift Annuities and Other Written Instruments

A gift made in a will, testamentary trust, inter vivos trust, or other written instrument will be considered restricted only if it contains a specific restriction on the use to which the funds are to be directed. No restriction of funds will be inferred simply from the manner in which the Society is named in the will, trust, or other instrument. Gifts designating the beneficiary as "National Multiple Sclerosis Society," or "National Multiple Sclerosis Society, _____ Chapter/geographic location," "_____ Chapter/geographic location, National Multiple Sclerosis Society," or "Multiple Sclerosis Society of (Chapter's state)" will all be considered unrestricted funds. Interpretation of intent by trustees, attorneys, family members, friends, or acquaintances of the donor may not alter the provisions of the written instrument in any way.

The amount of the bequest is included in a chapter's gross revenue in the year in which the request is received for purposes of determining NPE.

For Charitable Gift Annuities when the last beneficiary passes away, the residuum is transferred to the chapter and is treated in included in the chapter's gross revenue in the year in which the residuum is received for purposes of determining NPE.

I. Direct Marketing Campaigns

a. Society Direct Marketing Campaigns

A variety of direct marketing campaigns are conducted by the home office through mail, telephone and online appeals. These campaigns are vital to the Society's integrated fundraising strategy for three key reasons. The campaigns play a key role in acquiring new donors for the organization that will transition into other areas of giving over time. Secondly, the campaigns serve as a donor cultivation tool, as Society donors and event participants that receive direct marketing tend to have higher lifetime value and stay connected longer to the organization. Finally, the campaigns are an important revenue stream for the organization. For these campaigns, the chapter receives 50% of the net proceeds as an NPE credit, distributed according to the donations collected from each chapter's territory. In order to drive Society initiatives, the Direct Marketing Program revenue distribution has been revised. In FY13, the chapter will receive NPE credit for 50% of the actual FY11 audited Direct Marketing revenue. In FY14, funds received through this campaign will be applied to Society initiatives and remain as net income on the home office budget. There will be no credit to chapters through NPE.

b. Chapter Direct Marketing Campaigns

Developing relevant relationships with donors is a key element in the Society's fundraising strategy. Due to the comprehensive direct marketing program conducted by the home office for the entire organization, additional chapter resources should not be expended on extensive direct marketing campaigns. However, there is an exception specifically for donors that are capable of giving \$1,000 or more annually to the national MS Society. For those donors, chapter staff is encouraged to conduct their own bi-annual solicitations in the fall and spring according to established Society guidelines for individual giving. Donors should receive an invitation to join or review their Golden Circle Club annual membership in order to become involved with unique mission based opportunities.



DEVELOPMENT

June 29, 2012	CC: Marketing
<u>2012-2013 National Team Weeks and Blitz Days Announced</u>	

As you finalize your Walk MS, Bike MS and Challenge Walk campaign plans for 2013, please incorporate the nationwide Team Weeks and Blitz Days into your plans.

Each of these weeks highlights a strategy to recruit, cultivate and build your teams throughout the event season. They build upon each other to help you reach your financial and team registration goals. By cultivating your captains during National Team Recognition Week your chapter will register captains more easily during Team Captain Celebration Week. And the more captains you register during Team Captain Celebration Week, the higher your potential for recruiting large numbers of team members during the National Team Weeks. The Blitz Days are designed to support your ongoing recruitment and fundraising activities specifically related to Bike MS.

There will once again be a national work team focused on messaging for Team Weeks. Please contact Christy.Fath@nmss.org if you are interested in being a part of this team.

2012-2013 National Team Weeks*

- National Team Recognition Week – November 12-16
- Team Captain Cultivation Week – January 7-11
- Team Week #1 – February 11-15
- Team Week #2 – March 11-15 (MS Awareness Week)
- Nationwide Fundraising Week – April 1-5
- March Team Week is during MS Awareness Week - coordinate efforts to be most effective!*

2013 National Bike MS Blitz Days

- World MS Day Blitz: May 29, 2012
- First Day of Summer Blitz: June 21, 2012
- Summer FUNdraising Blitz: July 26, 2012

** Bike MS and Challenge Walk Team Weeks should be scheduled in a way that makes the most sense for your individual Bike MS event. We recommend one at 12-14 weeks out from your ride and an additional one at 8-10 weeks out from your ride.*

If you have questions, please contact: Sarah Klein at sarah.klein@nmss.org or 303.698.6100 x15170



MARKETING

June 29, 2012	CC: Chapter Presidents
	Development
	Information & Resources
	Programs & Services
<u>Momentum Fall 2012 Issue</u>	
Action Requested/Deadline: June 29, 2012	

The fall issue of **Momentum** will reach readers in your area by mail beginning August 1, 2012. The fully interactive **digital** and **smartphone** editions will be posted ahead of the mail date. The digital edition includes all content from the print edition, including advertisements, and allows readers to click on live links, download articles as PDFs, print pages and share articles via email, links or by posting to social networks.

This issue of **Momentum** includes a feature on families and MS that includes the personal experiences of people with MS and their family members, such as an essay by a woman on how she is so much more than her husband's "caretaker," ways to connect, resources for families and more. Other articles include a story on two family-oriented Do It Yourself events, a low-vision alert on online resources, protecting your online privacy, strength training, a guide to long-term care, financial planning for a life with MS and more.

This issue may prompt readers to ask for information about or referrals to the following:

- An MS Navigator®
- Resources and programs for families
- A social worker or counselor
- Area support groups
- Peer-to-peer programs
- Caregiver resources
- Help with personal care, including hiring a home aid
- The Financial Education Partners program
- Walk MS or Bike MS events
- Do It Yourself fundraising
- MSconnection.org
- Area fitness classes or personal trainers with experience in MS

- Elder law attorneys
- Government financial assistance programs
- Social Security Disability Insurance (SSDI) or Supplemental Security Income (SSI)
- Health insurance options
- Long-term care
- Help with appealing insurance decisions
- Society Scholarships
- Voting requirements and accessibility

Readers may ask for copies of these Society publications:

Adapting: Financial Planning for a Life with Multiple Sclerosis (brochure)

The issue mentions these books that you may want to consider for your chapter library:

Estate Planning for People with a Chronic Condition or Disability, by Martin
Shenkman

If you anticipate needing additional copies of this issue for your chapter, please email me or phone me at the number below. We hope this is helpful. Please let me know any feedback you receive.

Gary Sullivan
Managing Editor
212-476-0538
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PROGRAMS & SERVICES

June 29, 2012	CC: Chapter Presidents
	Information & Resources
<u>MSCIR PROFESSIONAL CERTIFICATION REGISTRATION</u>	
Registration Deadline: September 10, 2012	

Registration for the MSCIR Examination:

Registration is now open for the Multiple Sclerosis Information and Referral (MSCIR) exam. This exam offered twice a year and is administrated by the Professional Testing Corporation (PTC). **These are the final dates offered for the MSCIR this calendar year.** Certification is recognized for five years. If you are currently certified, please verify that your date of certification is within the past five years. If you are not sure, you may contact Janis Pluss, Janis.pluss@nmss.org.

What Is The Purpose of Certification?

Certification provides formal recognition that an individual possess a high level of knowledge of multiple sclerosis and its effects, and that they also demonstrate a high level of ability to serve people affected by MS.

Who Should Take The Certification Examination?

Certification is open to Society staff and volunteers as well as the general public. Chapter staff may choose to take the examination on their own, or may request their supervisor to approve the exam and have the cost covered by the chapter.

How Do I Know If I am Ready To Take the Examination?

The Professional Testing Corporation provides an application and handbook that details the eligibility requirements and the intellectual and practice domain areas that will be tested. It will be useful for candidates to study these handbooks carefully.

Eligibility Requirements:

- Have at least a Bachelor’s Degree
- Have at least one year or 1800 hours of direct experience in Multiple Sclerosis Information and Referral
- Complete and file an application
- Pay the required \$250.00 application fee

MSCIR Registration

Information on the MSCIR examination is now available at PTCNY.com: click on the Test Information page, then scroll down to the NMSS box and select the MSCIR icon. Cost for the examination is \$250.00. Payment may be made by check, money order, or credit card. Please see the handbook application page for more information.

Application deadline:

September 10, 2012

Testing Window:

October 13 – October 27, 2012

The certification examination will be administrated on a daily basis; during an established two week testing period at a computer based testing facility located in over 500 locations nationwide.

For more information, contact Janis Pluss at ext.15284 or Janis.pluss@nmss.org

For more information on PTC contact:

Professional Testing Corporation

1350 Broadway, 17th Floor

New York, New York, 10018

Phone: 212 356-0660, Fax: 212 356-0678

PTCNY.com



PROGRAMS & SERVICES

June 29, 2012	CC:
National Template for Self-Help Group Leader Business Cards	

In response to staff and volunteers expressing a need for one unified look, a standardized template has been developed for self-help group leader (SHGL) business cards. A group of chapter staff liaisons who work with self-help group leaders as well as the home office worked together to create the template.

The chosen design provides the requested SHGL information and has a distinct design that differentiates it from the standard NMSS staff business card.

The front of the card explains the purpose of self-help groups and that the groups are run by Society volunteers. The back of the card has room for each SHGL's contact information or group/meeting information.

The SHGL business card template provides you with different printing options:

1. Print the cards locally for individual leaders with the chapter website and logo on the front and their name and group information printed on the back of the card.
2. Insert the chapter website and logo on the front, print the back of the card blank and provide cards to group leaders to handwrite in their personal information.
3. Insert the chapter logo and website (and group information on the back if desired) and send to your SHGLs to print themselves.

This template should provide you with flexibility on printing costs while still providing a unified look nationwide.

Using the template is optional, but if used ensures that leaders have a consistent, on-brand tool to use.

The template is available on the FTP site under "SHGL Business Card_Final Folder."

For additional information please contact Monica Aden at 303-698-6100 x15169 or Monica.Aden@nmss.org



PROGRAMS & SERVICES

June 29, 2012

CC: Chapter Presidents

PROGRAM AND SERVICES STAFF EMAIL GROUP

In October 2005, the Programs and Services Department launched the Programs and Services List-Serve. There are currently over 200 chapter and home office staff members from both the National MS Society and the MS Society of Canada registered.

The goal of the list-serve is to develop networking and sharing opportunities for Programs and Services staff. The list-serve is for exchanging information on best practices, programming, community resources and managing client issues. The home office also occasionally uses the list serve to share information relevant to programs and services, such as reminders of staff training opportunities. Topics of recent conversations include:

- Staff certification programs
- Best practices for managing self-help groups
- Care management

You can post questions, seek opinions and/or ask for assistance from programs and services colleagues from across the country and Canada. Messages are delivered as individual posts or in a digest format. The benefit of the list-serve concept is that you do not need to go to a separate site to view posts—all posts are delivered directly to your email inbox.

To register, please send your name and email address to Kim Koch at Kimberly.koch@nmss.org. Upon confirmation instructions on how to use the list-serve will be provided and you can begin posting.

Please note – if you believe you are a registered member but have not received posts over the past several months, contact Kim to confirm your email address. The non-receipt of messages could be related to a change in your email address.