**State Advisor Management Conference**

**Frequently Asked Questions**

**Financial Information and Fundraising**

1. **What’s the difference between sponsors and partners?**

The term partner and sponsor are often used interchangeably but typically a “sponsor" is when a company has paid for a service (i.e. advertising, logo placements, event sponsorship). A "partner" usually refers to two organizations working with each other on a deeper more collaborative manner. A partner, hopefully, feels a greater sense of ownership and is more committed to finding solutions to challenges that are experienced by the organization. Sponsorships are more temporary; partnerships are more lasting. A partner can sponsor an event. And, a sponsor, over time, could evolve to become a partner.

1. **Where can I find information on new grants and deadlines for applications?**

One of the best ways to get money for an organization is through corporate partnerships. It takes time to develop partnerships but the long-term return is worth the investment of time and patience. Your corporate partners will evidently connect your chartered association to financial resources as well as in-kind support and volunteers.

There are several grant options available online; a few are listed:

**Edutopia –**

Website has a list of educational grants, contests, awards, free toolkits and guides aimed at helping students and classroom. This also includes grants for professional travel for teachers.   
Website: <https://www.edutopia.org/grants-and-resources>

**Grants Watch** –

Website posts federal, state, city, local, and foundation grants on one website. The grants are categorized by type (i.e. teacher grants). Website: <http://www.grantwatch.com/>

[**U.S. Department of Education/Office of Career, Technical and Adult Education** –](http://www.grantwatch.com/)

Grants and Programs for Career and Technical Education

[Website:  https://www2.ed.gov/about/offices/list/ovae/pi/grntprgm.html#cte](http://www.grantwatch.com/)

**Teachers Count –** The K-12 **school grants** website provides teachers with the latest updates.

Website: http://www.teacherscount.org/grants/

**Grants for Educational Travel for High School Students**

Website: <http://traveltips.usatoday.com/grants-educational-travel-high-school-students-57040.html>

1. **What are some unique fundraising ideas for more participation for students to attend conferences and events?**

Again, it is highly recommended to seek sponsorships among the health industry including professional associations. If your state or chapters must fundraise, several options have been made available through a publication called “Fundraising Ideas for Chartered Associations and HOSA Chapters” which is a collection of fundraising activities from assorted youth-serving organizations including HOSA Chapters. The publication also includes valuable information about developing a fundraising proposal as well as a sample letter and elevator speech to potential donors. The publication can be found on the 2017 State Advisors Management Jump Drive or online at [hosa.org/advisor](http://www.hosa.org/advisor).

In addition, HOSA has published the following articles online about fundraising: [7 Tips on Asking for Donations](http://www.hosa.org/node/360) and [Fundraising: Work Smarter, Not Harder](http://www.hosa.org/node/255).

**Fan-Pledge.com**

Fan-Pledge is a simple and effective fundraising solution to earning money. This company helps youth organizations and nonprofits meet their fundraising goals in less than an hour with fail-proof live events! It is quick, easy and makes a LOT of money in less than an hour!!!

There a number of online websites that specialize in helping people achieve very specific goals which could include support to attend the International Leadership Conference—why and how much support is needed.

1. **What is Perkins legislation as it relates to CTSOs?**

The Carl D. Perkins Career and Technical Education Act of 2006 (Perkins) provides federal support for CTE programs in all 50 states and the territories. The law focuses on the academic and technical achievement of CTE students, strengthening the connections between secondary and postsecondary education, and improving accountability. Perkins includes a new requirement for programs of study (POS), which is intended to seamlessly link academic and technical content across secondary and postsecondary education. Perkins is the largest federal investment in America’s high schools and a significant source of support for postsecondary institutions offering CTE programs. For more information, go to <https://www.careertech.org/perkins>.

1. **How can I recruit partners and sponsors at the state level?**

Whether you are looking for conference partnerships or scholarship sponsors, it is recommended to start in your local community. Identify businesses with an interest in health (i.e. Health Systems, Doctor Offices, Colleges and Universities) or develop an advisory committee (i.e. HOSA alumni, advisors, community contacts, school administrators) who can help you make the right contacts in your state.

Here are some helpful hints, to attract sponsors from [entrepreneur.com](https://www.entrepreneur.com/article/217913):

* **Start with a story.**It could be your story, or the story of someone whose life you changed. Whatever you do, tell a story. This will get your proposal to stand out and make an emotional connection. That person has to make an emotional decision to give you the money.
* **Describe what you do.**This is your mission statement. It explains why you do what you do.
* **Benefits.**You have to have really great benefits for the sponsor you're approaching.
* **Describe your demographics.**
* **Create an advisory board.**If you don't have experience, surround yourself with people who have experience. Show potential sponsors that you have an A team.
* **Ask for the money.** Be specific about your needs and what the sponsor can expect in return.

If you are familiar with the HOSA-100 National Advisory Council, it is suggested that consideration be given to establishing the HOSA-100 State Advisory Council. Each Council member is a member partner of the state association. Request the brochure from HOSA Headquarters for the HOSA-100 NAC to serve as a template for a HOSA-100 State Advisory Council. Guidance will be provided by the Director of the Washington Office to use the national model for a State Advisory Council to develop partners at the state level.

**Membership**

1. **Ideas for membership growth and development?**

In addition to information contained in the HOSA Handbook ([Section C](http://www.hosa.org/sites/default/files/Section%20C%202017%20Final.pdf)) Guide to Organizing and Managing a HOSA Chapter, HOSA surveyed local chapters and developed a list of [10 Best Practices for Increasing HOSA Membership](http://www.hosa.org/sites/default/files/HOSA%20MembershipSM_0.pdf).

1. **Where can I get HOSA Membership Cards?**

[Awards Unlimited](http://www.awardsunlimited.com/store/c/103-HOSA.aspx) offers Membership Cards for sale each year. Cards can be purchased individually by members or in bulk by chartered associations. For more information, contact Tim Moravec at [tmoravec@awardsunlimited.com](mailto:tmoravec@awardsunlimited.com).

**Policies and Procedures**

1. **Who serves as chaperone to national events?**

Since HOSA is a school-based program, the travel rules are based on school policy. The ratio of student to advisor/teacher is also a school policy. If the school will allow another teacher or parents to be the chaperone for the students, HOSA will accept them. HOSA’s policy is that all students must have school-approved supervision.

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1. **What type of financial and liability insurance does my state need?**

General Liability Insurance at a minimum of $2,000,000.00 coverage, D&O Insurance, Commercial Crimes, and Molestation Coverage.

1. **How do we handle different school districts with different policies?**

At HOSA at the international level, each state has a different policy; therefore, our policy is that we allow states to make the policy i.e. number of chaperones to attend with students. We don’t make that policy. That would be a state or local district/school policy. Recommendation for states would be to try to keep away from making state policies that will conflict with different school policies and share that the policy will be a local decision.

1. **How can I get chapters to pay their bills on time?**

The State Advisor has the technological capability to put a block on the local advisor’s affiliation and registration system until money is paid. That means the chapter cannot participate in the state registration system until they pay. When they go online to register, they won’t be able to do anything because it is locked and they have to call the State Advisor to get it unblocked. If they haven’t paid at the end of the year, they will not be able to register the following year until their previous year’s bill is paid.

**State Advocacy/Boards/Advisory Committees**

1. **What is the difference between board types?**

There are several types of boards each having distinguishing characteristics. Below are the most common types of boards that represent HOSA chartered associations:

**Governing boards** lead the organization using authority to direct and control provided by the owners and the legal act of formation. They set initial direction and have the full authority to act in the owners’ best interests. Governing boards function at arm’s length from the operational organization. They focus on the big picture, future-oriented and act as a single entity.

**Working boards** lead the organization but serve as the staff. These are common in very small organizations and community based organizations that do not have the resources to hire employees. Working boards often get caught up in project management and set aside the governing function.

**Advisory boards** serve to provide insight and perspective to any decision maker including boards. An advisory board typically does not have authority of its own but works to educate some person or body. The HOSA-100 National Advisory Council is an example of an advisory board.

**Managing boards** manage the operations as a collective group. They make the day-to-day decisions of what gets done and the long-term decisions about how to organize operations to achieve the organization’s purpose.

1. **How to build strong state advocacy?**

Advocacy is defined as: active support, especially of a cause. An advocate is defined as: 1) to support or recommend publicly; plead for or speak in favor of; 2) a person who upholds or defends a cause; supporter; 3) a person who intercedes on behalf of another.

Advocating is not just about lobbying on the steps of your state and federal legislatures, it is about being an educated person and educating others about what is important to you. This ensures that when those legislators and policy makers vote and make decisions, they will have all the facts and know your best interest.

HOSA has provided an Advocacy Guide (available on your State Advisor jump drive) that includes Lesson Plans and a PowerPoint for local advisors. The Guide designed to assist you in navigating the steps necessary to become and effective advocate. This guide will focus on three areas that are vital to successful advocacy, education, relationships and action.

1. **What is the HOSA-100 Advisory Council?**

The HOSA-100 National Advisory Council serves as a vital champion of HOSA-Future Health Professionals. Council members provide HOSA with their professional expertise; their diverse knowledge of perspectives; their connections to local, state national or international resources, or colleagues; their philanthropic support or other valued assistance; and promote HOSA-Future Health Professionals as the pathway for young people interested in the pursuit of careers in health beginning in middle or high school and continuing in postsecondary and collegiate institutions.

1. **How can we increase Board member involvement?**

Here are some helpful tips to consider increased participation for boards and committees:

* Ensure members understand and can convey their role on the board/committee to members
* Ensure adequate orientation that describes the organization and its unique services, and how the board/committee contributes to this mission.
* Let go of "dead wood." It often helps to decrease the number of committee members rather than increase them.
* Consider using subcommittees to increase individual responsibilities and focus on goals. Attempt to provide individual assignments to the committee members.
* Have at least one staff member participate in each committee to help with administrative support and providing information.
* Develop an attendance policy that specifies the number of times a member can be absent in consecutive meetings and in total meetings per period.
* Generate minutes for each committee meeting to get closure on items and help members comprehend the progress made by the committee.
* Consider having low-attendance members involved in some other form of service to the organization, e.g., a "friends of the organization," or something like that, who attends to special events rather than ongoing activities.
* Rotate in new members every year.

Key to Board member involvement is “ownership.” If Board members feel a sense of ownership of the organization, they will have a greater level of commitment and their participation will increase dramatically. No ownership—no commitment—no (or limited) participation! People take care of what they own—they do not take care of what they do not own!

**Officer Election and Training**

1. **What is the Executive Council election process?**

The nomination and campaign procedures and application for Executive Council candidates are included in the State Advisor’s ILC Guide each year as Appendix B. Appendix B outlines the entire application process with the steps listed below.

1. State advisors shall receive one (1) copy of the Officer Candidate Packet. Local advisors should receive this information from the state advisor.
2. State associations in good standing may submit only ONE candidate per office but no more than four (4) total candidates; two (2) secondary, two (2) postsecondary/collegiate division candidates. Candidates must have at least junior classification in high school and have a minimum of a 2.0 GPA on a 4-point scale. Candidates must be active members of HOSA. (Article IV, Section 3, HOSA Bylaws)
3. The HOSA Nominating Committee will review all candidate applications prior to the International Leadership Conference.
4. The HOSA Nominating Committee shall administer the officer candidate written examination at the International Leadership Conference. Candidates must pass the written examination with a score of 75% as a prerequisite to be interviewed.
5. The HOSA Nominating Committee will interview all officer candidates before the final slate is determined (see enclosed "Interview Rating Sheet"). If the number of candidates warrant, there will be two separate interview panels: one for secondary and one for postsecondary/collegiate. One panel will interview candidates who wish to serve as President-Elect. Officer candidates will respond to questions by the HOSA Nominating Committee.
6. An orientation meeting for all officer candidates is scheduled on the first day of the International Leadership Conference to review nomination procedures, campaign activities and take the test. [This meeting will take place the Tuesday prior to the first day of the conference.]
7. Officer candidates will be required to participate in the Meet the Candidates Breakfast at the International Leadership Conference as well as the Annual Business Session.
8. The installation of the newly elected HOSA Executive Council will be conducted during the Recognition Session on Friday of the International Leadership Conference.

The following items are a part of the Officer Candidate Application and are required for eligibility - must be received by HOSA Headquarters no later than May 15. All items must be submitted together.

(1) Signed National Officer Travel Policy   
(2) Nomination Form  
(3) Statement of Support  
(4) Official Transcript  
(5) Candidate Information Sheet  
(6) Black and white or color photo   
(7) Black and white resume (one-page, front side only)  
(8) YouTube Video (email – instructions below)  
(9) Essay (New request in 2017)  
(10) Travel Policy

More information can be found in the HOSA Bylaws that refer to "Officer Duties and Nominating Committee Responsibilities" (Bylaws, Article IV, Sections 1-8).

1. **What are some tips for effective Executive Officer training? What topics should we include in the initial training of officers to help them be most effective in the performing and fulfilling the responsibilities of the duties of their offices?**

Section F of the State Advisor Handbook (available on the State Advisor jump drive) has materials designed to give state advisors ideas for leadership training for state officers. Topics included in this section of the State Advisor Handbook include:

* Bringing Greetings/Thought for the Day
* Introducing a Speaker
* Sample Introductions
* Sample Quotes/Poems for Bringing Greetings/Thought for the Day
* Telephone Communication
* Sitting, Standing and Posture
* Shaking Hands
* Presenting Awards
* Writing Skills
* Leadership Styles
* Effective Listening
* Constructive Feedback
* Leading Group Discussions
* Sample Letter from State Office

In addition, to the materials in the State Advisor Handbook, HOSA strongly recommends that officer candidates participate in HOSA University sessions at the ILC and the Washington Leadership Academy. HOSA University is designed to facilitate leadership development skills for HOSA members at different levels of leadership including members, local officers and state officers:

* **HOSA 100 Middle School Members**

HOSA 100 is specifically designed for middle school members. This session will focus on what it means to be a leader among their peers and build a foundation of continual leadership learning. Members will interact with fellow middle school students and cultivate their interpersonal skills through a series of relevant team building activities.

* **HOSA 101 Local Members**

HOSA 101 is for HOSA members that have not served as a chapter officer. HOSA members will focus on foundational HOSA knowledge, self-esteem building techniques, communication practices, goal-setting, leadership principles, and a commitment to strive for excellence as a future health professionals.

* **HOSA 201 Local Chapter Officers**

HOSA 201 is designed for local chapter officers. An experiential approach will be used to focus on traits of an effective officer, ability to move from “me” to “we,” people management skills, membership recruitment, time management, increased HOSA knowledge, and professionalism.

* **HOSA 301 State Officers**

HOSA 301 is for state officers only. This dynamic leadership development program will prepare state officers to be effective HOSA ambassadors, increase awareness of personal leadership strengths and weaknesses, encourage teamwork and successful networking, connect leadership development to organizational strategies, and develop advocacy skills.

**Advisor Retention and Local Chapter Recruitment**

1. **What are some suggestions for chapter advisor involvement and recognition?**

**Outstanding HOSA Advisor Award**

At the ILC, HOSA has two special recognitions specifically for advisors. The Outstanding State Advisor Award recognizes one (1) middle school; one (1) secondary; and one (1) postsecondary/collegiate HOSA advisor for each chartered association during the Recognition Session. Each state advisor may nominate one advisor for each division. The selection process is to be determined by each state association. This is a means of recognizing advisors for the time and effort they provide to successful HOSA chapter activities for their members.

**Outstanding Service Award for Local Advisors (sponsored by Goodheart-Willcox)**HOSA’s partner, Goodheart-Willcox, sponsors a local advisor award to recognize three local HOSA chapter advisors, one from each HOSA region, who have made outstanding contributions to local, regional, state and/or international significance to the promotion, development, and progress of HOSA–Future Health Professionals with an unrestricted cash award of $2,000 each. Each state association may nominate one advisor for the regional award. State associations will determine their process for selecting one nominee to complete the online application. More information about the award is online at www.hosa.org/GoodHeart-WillcoxAward.

In addition, State Advisors are also able to nominate local advisors for any of the following special awards nominations. The nomination form for each of these awards are including in the ILC State Advisor Guide (Appendix D)

* **Caduceus Award -** The nominee (individual or group) has demonstrated extraordinary leadership in promoting HOSA as the pipeline to the health professions. This award recognizes the importance of health industry leadership in working collaboratively to assure a well-qualified health care workforce for the future.
* **Above and Beyond Award -** The nominee has exceeded the expectations of service to a national or state organization.
* **Educational Excellence Award -** The nominee (educator or educational agency) has demonstrated extraordinary leadership in the educational community at a national or state level. The recipient’s vision and support enhances HOSA’s ability to promote career opportunities in health care, thereby helping HOSA members achieve their educational goals.
* **Leadership in Collaboration Award -** The nominee has demonstrated exemplary service to HOSA through partnership opportunities. The award recipient plays a unique and outstanding role in providing services to HOSA at the national level.
* **Lifetime Membership Award -** The nominee has made a significant contribution to the growth and improvement of the national organization or provided financial and/or other support to one or more special National HOSA projects.

**Conferences and Events**

1. **What are some Fall Leadership Conference ideas/topics?**

Section H of the State Advisor Handbook (available on State Advisor Jump Drive) provides information *to help you plan and implement a leadership conference. A leadership conference is usually offered in the fall of the year; however, the information can be modified and adapted the following materials to fit the needs of your state association.* Section H contains information regarding:

* Duties of Fall Leadership Workshop Coordinator
* Fall Leadership Workshop Letter (from State Officers)
* Sample Agendas
* List of Responsibilities
* Plan of Work Session (Outline for facilitating officer)
* Scripting
* Chapter Information Checklist
* Registration Form
* Evaluation and Report

Since 2016, HOSA has offered a Fall Leadership Conference Curriculum and “Train-the-Trainer” session at the ILC. The curriculum is designed to be versatile and inclusive of all levels of leadership development; the content is suitable for middle school, high school and college audiences and can be provided in settings such as leadership conferences, camps and/or chapter officer trainings.

**Train-the-Trainer Workshop**  
Each state provides state facilitators to be trained at the HOSA International Leadership Conference. A member of the HOSA staff will train up to two (2) state facilitators during a special “Train-the-Trainers” workshop. During the workshop the trainer will provide concepts for delivering the curriculum and tools to enhance student learning. The trainer will walk through each lesson of the curriculum and teach the best practices of leadership facilitation.

At the end of the “Train-the-Trainers” National HOSA provide all the leadership curriculum materials on a jump-drive for each state to reproduce and utilize at their state conferences.

In addition, to the train-the-trainer workshop, we are also offering two additional delivery methods for the Fall Leadership Conference Curriculum.

* **HOSA FACILITATOR**The curriculum would be delivered by a HOSA Facilitator. This is the most low-maintenance option for the state. The cost for this delivery method is $250 per day (including facilitator travel days), plus travel and lodging for one facilitator. National HOSA will send one facilitator per conference. The host state is responsible for the production of all student material.
* **REQUEST CURRICULUM ONLY**

States will have the option to use curriculum provided by HOSA. Delivery of the curriculum is solely the responsibility of the host state. HOSA staff will not be onsite but will provide all the leadership curriculum materials on a jump-drive for each state to reproduce and utilize at their state conferences.

1. **How do we locate keynote speakers**

* **Use your professional and partner contacts.** Review profiles, participate in groups and read the content of your contacts to identify potential speakers for your next upcoming event. These professionals are often more than willing to consider speaking engagements.

#### **Use a speakers bureau professional speakers.** These organizations can connect you with professionals who specialize in public speaking. Booking a speaker can be done through their published directory.

#### **Issue a call for proposals**. A call for proposals, also known as a call for abstracts, gives potential speakers the chance to directly submit their ideas for talks. This gives you a large pool of qualified speakers interested in speaking at your event.

#### **Reach out to your local Chamber of Commerce**. Business owners join these organizations to increase visibility for their brand or business in their area. The chamber may be another resource worth tapping into for your event.

#### **Check local health professional organizations**. Connect with these organizations to find knowledgeable health speakers.

#### **Check your local university or college.** These institutions are often the first point of contact for finding an expert to weigh in on a subject or new study. Professors can also be ideal guest speakers in that they are skilled communicators and educators. Many universities have a speaker’s bureau that connects conference and event organizers like you with professionals interested in speaking opportunities.

#### **Look to nonprofits in your area.** Leaders in these organizations are often very active in the community and are comfortable speaking in front of audiences. Consider a local nonprofit as a potential resource for a speaker.