



montana chapter

PROCEDURES EDUCATION CHAIR/COMMITTEE

GENERAL DESCRIPTION:

The Education/Program Committee is responsible for developing and coordinating all chapter educational sessions, including program content, speakers, attendee registration, site arrangements and payment, and meeting follow-up. The conference theme used will be the national Chair's Theme. The Vice-President serves as the Lead and Co-Chairperson. The President-elect serves as the Co-Chair and Mentor in support of the VP. The Education/Program Committee should include at least 12 other committee members. The committee make up should include the following at a minimum:

- 2 – PFS professionals employed at a PPS hospital
- 2 – Finance individuals employed at a PPS hospital
- 2 – PFS professionals employed at a CAH hospital
- 2 – Finance individuals employed at a CAH hospital
- 12 – Total committee members

*Include non-board members

*Include representatives of key market segments (sponsors, health plan, physician office, early careerist)

PROCEDURE AND TIMELINE – EDUCATION SESSIONS:

JUNE

- Co-chairs meet to determine a reasonable division of responsibility and work plan. Everyone has their strengths and weaknesses, assign accordingly. Talk about how you will communicate and work together. Agree to NOT procrastinate.
- Recruit a program committee team.
- Review and confirm venue contract and details.

MID JUNE/DECEMBER

- Devise general plan/theme for upcoming conferences – by January 1/July 1.
Resources:
 - LTC and National Chair's Theme
 - General conference evaluation from the previous conference.
- In December for the Spring Conference, connect with the MHIMA Program Representative
- Research and begin to identify a keynote speaker. It is never too early to secure your keynote speakers for both conferences.



montana chapter

JULY/JANUARY

- Coordinate weekly conference calls with the program committee.
 - Send summary e-mail and follow-ups to committee members after each call.
 - Ideas not used should be accumulated and saved for the next conference and the overall conference evaluation (see below); build a spreadsheet with topic/speaker ideas
- Coordinate times and speakers in the agenda schedule.
 - Assign speakers to committee members for communication and follow-up
 - As speakers are secured, have responsible committee member send Speaker Data Sheet and Reimbursement guidelines (including hotel reservation info and board dinner invitation) (attached)

AUGUST/FEBRUARY

- Send an initial “Save the Date” – no later than August 15, February 15. Include:
 - Dates
 - Location
 - Hotel information
 - Conference theme
- Send out scholarship information – coordinate with Flex for Spring conference (they offer 10 scholarships)
- Finalize the agenda
- Build the event in event management system, providing for regular registration and vendor/sponsor registration. Determine early registration deadline for discount.
- Add event information to the Chapter website
- Send out first registration invitation no later than March 1 and September 1
- Send out registration and conference information reminders every 2-3 weeks, emphasizing key dates, early registration cutoff, room block expiration. Try to make each one unique to catch attention.
- Prepare the brochure for upload to the event management system. This needs to contain:
 - Speaker name and title
 - Brief description of the topic
- Organize/participate in scholarship committee
- Start thinking about speaker gifts – try and limit yourself to no more than \$25 per speaker, including the wrapping. Use your judgment.



montana chapter

SEPTEMBER/MARCH – Preparation

- Resend the marketing e-mail (send two to three times during the month)
- Prepare evaluations in Survey Monkey and daily emails with survey links.
- Prepare CPE certificates – use the Program Toolkit resource.
- Plan registration materials, e.g. combined name badge, agenda, free drink ticket for Fall and name badge and MHIMA notebook for Spring. Less paper to manage is better. Try new things.
- Create an attendee list for the vendors and email to sponsorship chair. **DO NOT INCLUDE EMAILS ON ATTENDEE LIST!**

OCTOBER/APRIL –

- Gather presentation slides for upload to event management system. Have your responsible committee members follow up as needed.
- Add the presentation material links, by schedule to the event site.
- Upload slide decks as received. *Make sure you convert them to PDF in reduced file size. Try to have all presentation slides uploaded to the event site at least 10 days prior to the conference.
- Send out an e-mail to the registered attendees with link to event site to download the presentation materials.
- Plan Board/Speaker dinner and make a reservation

A WEEK BEFORE THE CONFERENCE

- Make a list and start gathering what you need to bring. Think about decorations for the table, providing for any drawings, marketing other events, such as the WRS.
- Print the nametags.
- Make a schedule for manning the registration table – have committee members sign up for slots (Program Chairs should man table for initial registration rush)
- Coordinate final counts with the Treasurer.
- Review AV needs with Facility volunteer. Assign a “Tech Coordinator” and have them preload the presentations on a flash drive. Generally:
 - We rent lapel microphones for each speaker
 - We bring our own computers
 - We bring our own projectors



montana chapter

AT THE CONFERENCE

- Try not to completely ruin your liver over this. This too will pass. Soon you will be watching someone else do this function and you will giggle just a little.
- Assign session coordinators (generally the program committee speaker assignments). Those individuals introduce their speaker and remind attendees about the evals.
- Make sure your Tech volunteer sets up computers and projectors around 6:45 in the morning. Make sure each of the rooms is ready for the first presentation.
- Double check the breakfast area and eat.
- Make sure all of your volunteers do their jobs

AT THE BUSINESS LUNCH

- Thank the Program Committee (bring a list so you don't forget)
- Highlight program
- Discuss number of attendees and thank everyone for coming

POST CONFERENCE

- Send follow-up eval reminder by email for overall conference evaluation; resend daily eval emails.
- Summarize the evaluations and share that and a conference summary with the program committee and Board.
- Send speakers expense reimbursement information and process as received (you can have your committee volunteers help with this also). Send to officers to obtain TWO approvals and then send to the Treasurer.
- Ensure each of the speaker contacts send the evaluation for their speaker to the speaker.
- Make notes from this conference for the next conference (e.g. – more coffee at the breaks, speaker A should not speak next time)
- CPE information will be sent automatically once the registrant completes the evaluation.
- Breath

Attachments

* A - Dinner Invitation

* B - Speaker Data Sheet, Important Information for the Spring/Fall Conference Speakers, Speaker Reimbursement



**ATTACHMENT A
DINNER INVITATION TEMPLATE**

Thank you for agreeing to speak at our **Fall/Spring** Conference in **(location)**, MT **(date of event)**. Your generosity in sharing your expertise with our group allows us to offer quality education to our members.

The Board of the Montana Chapter would like to invite you to join us for dinner on Thursday evening **(date)**, after the Business Partner Social, if your travel arrangements allow.

Please RSVP by **(date)** to your program contact or directly to the Education Chair, **(name and email)**. Dinner will be at **(location) (time)** under the reservation name **(name)**.

**ATTACHMENT B
SPEAKER DATA SHEET**

TO BE COMPLETED BY HFMA:			
Education Chair:			
Conference Theme/Topic			
Speaker:			
Speaker Title:			
Speaker Organization:			
Speaker Email:			
Date & Time:			
Topic Length of Time:			
HFMA Contact:			
Introduced by:		Date confirmation letter/e-mail sent:	
TO BE COMPLETED BY SPEAKER			
Session Title:			
Speaker Cell:			
Brief speaker bio for brochure (please limit to 50 words or less):			
Brief program description:			
Presentation Take-a-ways:			
Level of Presentation:	Travel reimbursement	Speaker expense estimate:	Waived
Presentations will be posted to the chapter website and a link sent to registrants. Please email handouts at least one week prior to the session date to your program contact			
<input type="checkbox"/>	Beginner	<input type="checkbox"/>	Intermediate
<input type="checkbox"/>		<input type="checkbox"/>	Advanced
AV Requirements: Mark as needed			
LCD	Flip Chart	# of Mics	Other:

**IMPORTANT INFORMATION FOR MONTANA HFMA FALL/SPRING CONFERENCE
SPEAKERS**

- Thank you for agreeing to speak at our **Fall/Spring** Conference in **(City)** on **(date)**.
- Your generosity in sharing your expertise with our group allows us to offer quality education to our members.
- Please complete the green section of your speaker data sheet and return to your contact as soon as possible so that we can complete our Program Brochure
- Please make your own room reservations soon to ensure you receive the conference block rate. The Conference hotel is as follows:
 - **(Hotel Name)**
 - **(Hotel Address)**
 - **(City, State Zip)**
 - **(Phone number)**
- Please send your presentation slides in PowerPoint or handouts in PDF format to your Program Contact or the Education Chair **NO LATER** than **(date)**. This will allow us to get them posted for our attendees to access prior to the conference.
- Travel expense guidelines relative to your reimbursement are included with this email
- The Board of the Montana Chapter would like to invite you to join us for dinner on Thursday evening **(date)**, after the Business Partner Social, if your travel arrangements allow. Please RSVP with your Program Contact or directly to the Education Chair.
- Please feel free to contact your HFMA Program Contact or the Education Chair, **(Name)**, or your Education Co-Chair, **(Name)**, with any questions or concerns.