

## **NJ HFMA checklist for committee's members planning an educational program**

### **Date Setting**

1. The Board determines the date of the Quarterly meetings.
2. The dates for all other education meetings would be selected by the committees with approval from the Vice President on NJHFMA Board

### **Lead Committee's responsibilities**

1. Develop theme
2. Coordinate conference call with participating committees
3. Finalize the topics to be presented and confirm with the participating committees
4. If applicable, lead committee should coordinate communication with joint associations.
5. Educational Flyer
  - i. Lead committee develops flyer
  - ii. Flyer to be e-mailed/mailed 6 to 8 weeks in advance of meeting. Therefore, flyer to be sent to full Board, at the latest, the meeting prior to the date of mailing.
  - iii. Board meets either on the second Tuesday, Wednesday or Thursday of every month
  - iv. Determine CPE allowable credits and obtain CPE approval from CPE Coordinator. This can be done before or after submission to the Board. Need at least one week, if not two weeks to obtain authorization for the CPE credits.
  - v. If there are any revisions after the Flyer has been submitted to the full Board, the VP can make the final determination.
  - vi. VP reviews flyer prior to distribution
  - vii. Submit flyer to Chapter Administrator for distribution 8 weeks prior to conference date.  
*Please note printer takes a week to ten days to process the flyer and mail it out.*
6. Develop an email to membership advertising your conference to accompany the flyer, submit to Vice President for approval, then to Chapter Administrator for distribution based on above time frame of sending flyer.
7. Lead committee to coordinate all speaker presentations onto one laptop, in advance of conference. If possible, have a back-up laptop and CD for presentations.
  - i. Forward copies of speaker's presentations to CPE Coordinator
8. Arranges for audio-visual needs through Vice President one week prior to conference
9. Prepare speaker evaluations, submit to Chapter Administrator the Friday before the conference date – per attached standard format
10. Determine who will moderate
11. Determine who will introduce speaker
12. Coordinate all hand-outs for distribution the day of the conference
13. Establish and distribute emergency/last minute contact list for speakers and moderators
14. Assign two committee members to walk around with wireless microphones
15. Collect and tally results from speaker evaluations, present to Board liaison, to bring to the next Board meeting, using attached standard format.
16. Final evaluations to be sent to CPE Coordinator after they are tallied. These are required for CPE back-up.
17. Send thank you and results of evaluation of speakers

### **Participating Committee's responsibilities**

1. Participate in scheduling conference calls for Quarterly meetings
2. Indicate whether can participate or not in Quarterly Session
3. Provide several topics if participating
4. Confirm with Lead Committee topic to present
5. Select speaker for his/her topic
6. Coordinate the speaker's presentation, ensure the presentation covers requested topic, determine audio-visual requirements, and travel arrangements.
7. Develop questions for respective speakers.
8. Send speaker's presentation to the lead committee at least one week in advance of conference.

### **Chapter Administrator's Responsibilities**

1. Chapter Administrator prepares the attendee list for distribution. The list includes the attendees', name, title and employer
  - i. This list may be given to presenters
2. Brings the CPE credit sign-in sheet.
3. Brings the evaluation forms
4. Communicate number of attendees to Vice President at least 48 hours in advance of conference
5. Brings the individual CPE sheet copies
6. Brings a limited number of agendas
7. Forwards the original CPE sign in sheets to CPE Coordinator and a set of any hand-outs
  - i. Lead Committee responsible for sending presentations to CPE Coordinator

### **Vice President's Responsibilities**

1. Vice President books the Woodbridge Hilton once the date has been approved by the Board or the Committee
2. Vice President communicates number of attendees to Woodbridge Hilton 48 hours in advance
3. Vice President orders food and coordinates time frames when reservation with Woodbridge Hilton is confirmed
  - i. Any issues on day of conference to be handled by Officer present or Chapter Administrator
4. Vice President signs the Hilton event orders

### **Logistics**

1. For Quarterly meetings, the Woodbridge Hilton usually designs the room, depending on the number of attendees. There is some flexibility.
2. Other education conferences, it is up to the committee to design the room with the Vice President one week prior to the conference.
3. All contracts are to be signed by the Chapter President (if applicable)

**We need to decide who will be responsible for the chapter's projector and getting that to the events.**

### **Checklist for speakers:**

1. Inform speakers of the conference date and scheduled time of discussion
2. Inform speakers on length of discussion
3. Establish a date and time for a speaker conference call
  - i. Inform speakers of expected audience

- ii. Ensure no overlap of speaker discussions
  - iii. Obtain bios
  - iv. Ensure presentation covers requested topic
4. Provide e-mail address for presentation submission in advance of meeting date, at least one week prior to conference
  5. Determine specific audio-visual requirements and coordinate with lead committee. Lead committee will coordinate through Vice President
  6. Inform speakers of the required 'non-sales' format
  7. Inform speakers to ship copies of handouts one week prior of the conference to hotel. Make sure HFMA and date of conference is written on box
  8. Provide directions to speakers
  9. If travel is required, determine accommodation needs (if any). Inform Chapter Administrator, who will make arrangements.
  10. Provide speakers with emergency contact name, e-mail address and phone number
  11. Obtain emergency/last minute contact phone numbers from speakers
  12. Provide speakers with anticipated audience questions