



IOWA SOCIETY OF MEDICAL ASSISTANTS, INC.

Affiliated with the American Association of Medical Assistants

ISMA Conference Guidelines

May 2015

Approved by the ISMA Executive Board on _____.

Updates approved by the ISMA Executive Board on _____.

ISMA Conference Guidelines

These guidelines are intended to offer assistance and guidance to those local chapters who have agreed to host an annual conference. Requests for additions and/or clarifications and suggestions for changes are welcomed by this committee. Thank you for helping to keep ISMA a strong and vital organization.

Table of Contents

ISMA Bylaws ARTICLE XIII -- MEETINGS/CONFERENCE	3
Conference Rotations	4
ISMA Conference Guidelines	6
Preliminary Planning	6
Conference Site	7
Task Delegation	8
Financial Management	9
Conference Treasurer	9
ISMA Financial Responsibility	10
Conference Receipt	12
Registration	12
Registration packets	12
Registration forms	13
Decorations	14
Affiliated Donations	14
Nonmember Medical Assistants	14
Students	14
Welcome Party Committee	14
Education Committee	15
Educational Sessions	16
Speakers	16
Exhibitors	17

Guidelines for Exhibitors.....	17
Welcome folders (See appendix A).....	18
Meals.....	18
Breaks.....	19
Student Sessions	19
ISMA President Responsibilities.....	19
ISMA Vice President Responsibilities.....	20
AAMA Representative (optional)	20
ISMA Physician Advisors	21
House of Delegates	22
ISMA Executive Council Meetings.....	23
Door prizes/Drawings/Gifts/Donations	23
Door Prizes	24
Flowers.....	24
Guest Seating and Protocol.....	24
Banquet/Luncheon	25
Photographer	25
Welcome Party /Special Events	26
Invitation to Future ISMA Meetings	26
Sponsorship.....	26
Appreciation.....	27
Guideline Revisions.....	27
APPENDIX A – Sample Conference Registration Form.....	28
Email Notice.....	28
Postcard Notice	29
Conference Program.....	30
Registration Form	31
Evaluation of Conference Form	32
APPENDIX B- Sample Exhibitor Letter.....	33
Exhibitor Response Form.....	34

APPENDIX C – Sample Letter for Chapter	35
APPENDIX D – Exhibitor Guidelines	36
APPENDIX E – Sample Appreciation letter	37
APPENDIX F - Sample Speaker Letter	38

ISMA Bylaws ARTICLE XIII -- MEETINGS/CONFERENCE

Section 1. ISMA Annual Conference

- A.** The ISMA Annual Conference will be held in April, at which time the ISMA House of Delegates shall convene.
- B.** The ISMA Executive Board must approve the conference being held any other month.
- C.** The city and date shall be announced at the ISMA House of Delegates at least one year in advance.

Conference Rotations

Component chapter presidents bid each year at the ISMA House of Delegates for their turn in rotation. The hosting chapter - the rotation schedule is to be used to determine the hosting chapter. Listing of the past conferences

	Year	Date	Chapter	City	Theme
1	1956	May 26-27	Linn County	Cedar Rapids	---
2	1957				
3	1958	May 17-18	Sioux City Chapter	Sioux City	---
4	1959		Jasper-Poweshiek	Ottumwa	
5	1960	May 6-7-8		Fort Dodge	
5	1961	May 5-6-7	Scott	Davenport	Follow Us to Davenport
6	1962	May 7-8	Blackhawk Chapter	Waterloo	
7	1963	May 3-4-5	Des Moines County	Burlington	
8	1964	May 15-16-17	Linn County	Cedar Rapids	Image and Reality
9	1965	May 13-16	Mason City Assoc.	Mason City	
10	1966	May 13-14-15	Des Moines	Des Moines	Fantastic World
11	1967				
12	1968				
13	1969				
14	1970				
15	1971		Woodbury County	Mason City	
16	1972	May 19-20	Linn County	Cedar Rapids	
17	1973			Des Moines	
18	1974	May 3-4-5	Siouxland	Sioux City	Forward with Finesse
19	1975		Scott	Davenport	
20	1976	May 14-15-16	Blackhawk Chapter	Waterloo	
21	1977				
22	1978	April 28-29-30	Linn County	Cedar Rapids	Well of Knowledge
23	1979				
24	1980				
25	1981		Scott	Davenport	
26	1982	April 24-25-26	Blackhawk Chapter	Waterloo	
27	1983		Linn	Cedar Rapids	
28	1984		Linn	Cedar Rapids	
29	1985	April 12-13-14	Siouxland		Knowledge Beyond the Rainbow
30	1986		Scott	Bettendorf	Pearls of Wisdom
31	1987	April 3-4-5	Linn	Cedar Rapids	Plant the Seeds of Knowledge
32	1988	April 8-9-10	Des Moines	Des Moines	
33	1989				
34	1990				
35	1991	April 5-6-7	Scott	Davenport	Run for Excellence
36	1992		Linn	Cedar Rapids	Under the Big Top
37	1993	April 2-3-4	Des Moines	Des Moines	A Touch of Class at the University
38	1994		Shoquoquon	Burlington	

	Year	Date	Chapter	City	Theme
39	1995	March 31-Apr 1-2	Area V	Fort Dodge	Back to the Fort II
40	1996	April 12-13-14	Mid Iowa	Marshalltown	Mardi Gras in Marshalltown
41	1997	April 11-12-13	Scott	Davenport	Fill Your Basket with Knowledge
42	1998	April 17-18-19	Linn	Cedar Rapids	Make Your Dreams Come True
43	1999		Southwest Iowa	Council Bluffs	A Blast From the Past
44	2000	April 7-8-9	Des Moines	West Des Moines	New Millennium, New Beginning
45	2001	April 20-21-22	Shoquoquon	Burlington	Relax and Have Fun in 2001
46	2002	April 12-13-14	Area V	Fort Dodge	Try Your Hand at Lady Luck
47	2003	April 11-12-13	Ames	Ames	Go For the Goal
48	2004	April 23-24-25	Linn	Cedar Rapids	Got Disco Fever?
49	2005	April 8-9-10	North Iowa	Clear Lake	Looking Back . . . To the Future
50	2006	April 21-22-23	Mid Iowa	Marshalltown	The Flavors of Life
51	2007		NW Iowa	Okoboji	Sailing
52	2008	April 4-5	Des Moines	Des Moines	Rest, Relax and Re-educate
53	2009	April 17-18-19	Shoquoquon	Burlington	Ride the Rails to Knowledge
54	2010	April 16-17	Area V	Fort Dodge	Heroes of the West
55	2011	April 15-16	Linn	Cedar Rapids	Racing the Rapids of Ever Changing Healthcare
56	2012	May 4-5	Ames/Mid Iowa	Ames	The Greatest Wealth is Health
57	2013	April 12-13	North Iowa	Mason City	Healthcare in the Heartland
58	2014	April 25-26	NW Iowa/Siouxland	Storm Lake	
59	2015	April 17-18	Des Moines	Des Moines	Fly Into the Future of Knowledge!
60	2016	April 15-16	Shoquoquon	Burlington	Twists and Turns of Healthcare
61	2017		Area V		
62	2018		Ames		
63	2019		Linn		
64	2020		North Iowa		
65	2021				
66	2022				
67	2023				
68	2024				
69	2025				

ISMA Conference Guidelines

1. The prior ISMA Conference chair shall be available to mentor the incoming ISMA Conference committee. A conference chair is to be appointed by the Hosting Component chapter.
2. The conference chair is to set up all committees needed for the conference and seek participation to complete the committee work, and be present at all ISMA Executive Council meetings.
3. Conference Chair and the Hosting Chapter(s) shall be responsible for securing the hotel and plan all meal functions, within a set budget.
4. Profit monies after expenses are met are to be divided equally between the hosting chapter(s) and ISMA.

Standing Rule #4 (Revised 1991)

Should the hosting component chapter have need of financial assistance prior to ISMA Annual Conference, a "loan" could be obtained for this purpose, this loan to be repaid within thirty (30) days following the conference.

One-half of the profit derived from the ISMA Annual Conference will be presented to the ISMA Treasurer within sixty (60) days following the conference. Component chapters hosting the conference for the first time will keep 100% of the profits.

5. Utilize the AAMA Representative for focus group during the ISMA conference weekend.
6. Have a copy of the full ISMA conference agenda available on the ISMA website and at the ISMA registration desk at check in and make announcement of changes as necessary during the conference.

Preliminary Planning

- A hosting chapter has placed a bid usually two years in advance. Then a small temporary committee is established to select a hotel headquarters which is immediately advisable, thereby insuring availability of accommodations at ISMA conference time. After this important matter is settled, you are "in business" and can proceed to organize your permanent working force.
- Competitive bids should be obtained, when possible. This will insure obtaining the best location and facilities for the most reasonable rates.

To be sure of hotel headquarters that are satisfactory for your needs, check on the adequacy of the following:

- ☐ Available guest rooms
- ☐ Space for registration

- ☐ Meeting room facilities
- ☐ Facilities for banquet, dinners, luncheons, cocktail parties, and any other social events be held at hotel

Make friends early with the Conference Manager of your Headquarters Hotel. He/she can help you avoid mistakes and save you much time and effort. Follow his/her advice on the best method to set up liaison between your committee and his/her staff, thereby avoiding confusion and duplication of effort.

Conference Site

The ISMA annual conference shall be in the spring of each year as stated in the ISMA Bylaws Article XIII and approved by the ISMA House of Delegates. The ISMA Conference Committee (the hosting chapter) shall select the dates and make the choice of hotel for this meeting.

The choice of location should be based on several factors:

- Hotel should have adequate space for the following if needed. Some of the items are.
 - Educational sessions
 - President's banquet
 - Awards luncheon
 - Exhibitors
 - Mock House of Delegates
 - ISMA House of Delegates
 - First Timer's break/welcome party
 - AAMA Representative's meeting
 - ISMA Executive Council meetings
 - ISMA Audit committee
 - Any special events and adequate hotel rooms for anticipated attendance.

Questions to ask of the potential hotel site.

- Hotels often offer incentives such as complimentary rooms for special guests, complimentary hospitality suites for the host chapter(s), special services, etc.
- Special pricing on meal functions and use of meeting rooms without additional charges may also be a consideration.
- Many hotels may offer the assistance of their professional conference planners at no additional charge to the hosting chapter(s).
- The final choice of location will depend on the ability of the hotel to comply with ISMA's desire to have the registration fee as reasonable as possible for its members.
For example:

- *A registration of \$135.00 covers the cost of at least three meal functions (Welcome Party, breakfast, Awards/Installation Luncheon, session breaks). Speaker fees.*
- *A daily conference rate of \$75.00 per day that includes lunch for the day should be offered as an option for members that can only come one day.*
- *The daily fee is subject to the \$10.00 late fee.*

1. A detailed written bid/contract from the hotel stating the total cost of meals, including gratuities and any other charges involved should be obtained.
2. In addition to the bid for meals, the Conference Committee should obtain a written description in the contract of any complimentary features and what special services or assistance the hotel will supply at no additional charge.
3. A list of the charges, including taxes, surcharges, etc., for the cost of attendee rooms should be listed in writing for single, double, triple and quadruple room occupancy. This information should be listed on the registration form available to each member and listed on the ISMA Website.
4. Determine and have the hotel block off the number of rooms needed for guests (determine if rooms are needed for handicap accessibility), for business meetings or committees, for House of Delegates meeting, for educational sessions, and for meals.
5. If possible, secure a floor plan of rooms to be used for the meetings. Determine the types of tables available.
6. Determine the number of microphones and speakers podiums necessary, and locate electrical outlets. Audio-visual equipment needed and technical support staff.

Task Delegation

There are many different tasks in planning and hosting a successful ISMA conference. These tasks should be delegated to various committees, so that no one member has a disproportionate share of duties. A Conference Chair is essential. Other committees you may need to appoint are:

1. Finance
2. Hotel reservations
3. Decorations/favors
4. ISMA Conference registrations
5. Exhibitors
6. Welcome Party/Entertainment

7. Hospitality/Reception
8. Meals/Breaks
9. Educational Sessions
10. Education committee
11. Donations, Door Prizes. Patron ads and sponsor's names printed in the program
12. Goodie Bags
13. Ways & Means tables for various committees and component chapters
14. National Representative Liaison

These committee chairs make up the ISMA Conference staff which should meet regularly to coordinate activities and to report on individual subcommittee progress. Such meetings are invaluable to pull in loose ends, eliminate duplication of effort, and avoid any possibility of failing to provide for essentials. A last minute check of specific subcommittee duties as listed on the following pages and of all arrangements with your Headquarters Hotel will contribute much to the success of your conference.

The number of members assigned to each committee and the total number and type of committees are up to the hosting chapter(s). Once the committees have been appointed, a roster list of the various committees and the members of each committee should be distributed to each member. Each member will then know whom to contact regarding any questions they may have regarding a particular aspect of the conference planning. Each committee chair should keep the ISMA Conference Chair informed of their progress and/or any problems they may encounter.

Planning sessions should be held regularly. Minutes should be kept of these sessions and distributed to the Conference Committee members, or at the very least, the Chair.

Any matters that may need the approval of the ISMA Executive Council should be brought to the attention of the ISMA President who will present it to the ISMA Executive Council Board.

Financial Management

Conference Treasurer - (appointed by the conference chair) One person should be designated to keep all financial items, (i.e. receipts, bills, checkbook, etc.) for the duration for the conference activities. In charge of the budget, balancing conference costs with income.

1. Attend all conference meetings.
2. A special bank account should be established by the hosting chapter(s) for the sole purpose of transacting the financial business of the conference with the conference chair and/or conference treasurer authorized to sign checks. All monies received should be acknowledged with a receipt, and all monies spent should be accounted for by invoices. Receipts, invoices,

cancelled checks, duplicate deposit slips and ledger for the conference should be ready for audit as soon as possible after the conclusion of the conference.

3. Prepare an itemized list of all items to be reimbursed to the conference committee by ISMA for the ISMA Treasurer. (see listing of ISMA conference cost responsibilities)
4. After the close of the conference business, furnish the ISMA Treasurer and the Finance Chair with a complete financial report by the August Council meeting.
5. Repay the loan back to ISMA. This is separate expense owed to ISMA by the hosting chapter.

Should the hosting component chapter have need of financial assistance prior to ISMA Annual Conference, a "loan" could be obtained for this purpose, this loan to be repaid within thirty (30) days following the conference. *ISMA Standing Rule #4 (Revised 1991)*

One-half of the profit derived from the ISMA Annual Conference will be presented to the ISMA Treasurer within sixty (60) days following the conference. Component chapters hosting the conference for the first time will keep 100% of the profits. *ISMA Standing Rule #4 (Revised 1991)*

Major expense items to be considered include:

Conference Expenses

- Mailing
- Printing
- Badges
- Speakers
- Invited guests
- Professional entertainers
- Food and beverages, etc.
- Exhibits

Conference Income

- Registration fees
- Contributions
- Exhibit space rental

ISMA Financial Responsibility

Standing Rule #7 (Revised 2000)

Expenses for the ISMA Annual Conference will include AAMA National Representative's lodging, registration, and incidental meals for the conference. Meals for any attending guests or speakers (and their spouses or significant other) when invited by the ISMA Executive Board or ISMA Conference Committee shall be paid by the ISMA.

Standing Rule #8 (Revised April 1998)

Cost of reception at the ISMA Annual Conference for newly installed president will be paid by Iowa Society of Medical Assistants, Inc. The component chapter hosting the ISMA Annual Conference will be responsible for all arrangements for the reception. The newly installed president's component chapter will have no responsibility for cost of the reception. The net profits after conference expenses have been deducted will be split between the hosting component chapter and the Iowa Society of Medical Assistants, Inc., evenly.

1. It is the financial responsibility of ISMA to pay the following expenses incurred during conference. These items should be billed separately to the ISMA Treasury. This should be reflected in the ISMA Conference budget.
 - a. Welcome item upon arrival for the AAMA Representative such as snacks, refreshments, etc. Communicate with AAMA Representative to their whims.
 - b. AAMA provides transportation for the AAMA Representative to the ISMA Conference. Arranging transportation to and from the airport for the AAMA Representative is set up by the hosting chapter.
 - c. Hotel accommodations for the AAMA Representative.
 - d. Full registration fee for the AAMA Representative.
 - e. All meals for AAMA Representative.
 - f. Decorations (floral, candles, etc.) for the installation table up to \$100.00.
 - g. Registration ribbons for the name badges, the name badges and lanyards.
 - h. Refreshments and/or meals during the Executive Council Meetings.
 - i. Cost of printing and mailing of the Delegates packet as a President's expense budget.

A complete financial statement must be provided to the ISMA Executive Council at the next Executive Council meeting, after the conclusion of the conference.

Refunds should be granted prior to the registration deadline at the request of the registrant. Refund requests received after the deadline should be accompanied by a letter of explanation from the registrant. These requests will be reviewed by the ISMA Conference committee and be granted or refused at their discretion.

If needed, the conference chair will ask the ISMA treasurer to supply a W-9 from the IRS.

Conference Receipt

If a receipt is needed a suggested form is provided below:

20 ISMA Conference Receipt

ISMA Conference ____ Date _____

Tax ID# (obtain from ISMA Treasurer)

Date: _____

Receipts of \$ _____ for educational seminar.

ISMA Conference Treasurer – treasurer's name / signature

Registration

- List hours the registration desk will be open. The hosting chapter members should be assigned to staff the registration desk at all times.
- Other pertinent information available. Such as church services, local establishments, etc.
- Maintain a complete list of all paid registrants received from the Treasurer.
- Order ribbons and make available in all categories to Executive Council Members, Guests, Educators, Life Members, Members, Committee Chairmen, Past Presidents, Exhibitors, and Physician Liaisons. (Present bill to ISMA Treasurer.)
- Registration committee is in charge of registration and information headquarters, including arrangements for:
 - Registration forms
 - Badges (including arrangements for fast, easily read lettering)
 - Registration equipment
 - Tables
 - Chairs
 - Change and cash box
 - Bulletin board for messages, phone calls, ISMA Conference agenda etc.
 - List of registrants with local addresses, for exhibitors and delegates

Registration packets should include:

1. Name tags - with the registrants name, credentials, chapter, and city
2. Conference program and CEUs

3. Material you may wish to include about the surrounding area
4. CEU registration sheet for AAMA
5. Evaluation form of ISMA Conference
6. Meal tickets
7. Names of Exhibitors
8. Official Program of Events
9. Patron listing, acknowledgements and thank-you

Goodies bags, containing pharmaceutical promotional items that are donated to the conference, such as note pads, pens, etc. are optional. Many registrants find the items fun souvenirs to take home. These bags if provided are handed out to attendees as they register.

A copy of the registration form should be sent to the ISMA Website manager eight weeks prior to conference for posting on the ISMA website at www.iowasma.org. A postcard reminder or e-mail notice will be sent to ISMA members notifying them of this posting.

Registration forms, after program approval by the AAMA, should be mailed out six to eight weeks prior to the conference to ISMA members. To facilitate this mailing, labels may be obtained from AAMA at no charge. At least a two week notice is needed to obtain the labels.

Registration forms should include: (See sample in Appendix A)

1. Name of organization
2. Date, time and place of meeting
3. Registrations fees
4. Spaces for name, address, home and/or work phone number and credential of registrant.
5. Check or circle box for member, non-member, physician, guest, student, and spouse.
6. Any designations that may be helpful to the registration committee, First Conference, Student, Delegate, Alternate, etc.
7. A schedule of the educational sessions and other events for the entire conference.
8. Deadlines for ISMA conference rate at hotel, early registration. Hotel information, including rates and a telephone number to make reservations. A reminder to members that hotel reservations are their responsibility including obtaining confirmations should be included.
9. A complete breakdown of the registration fees and what is and is not included (i.e. meals, non-member, student, guest meals, special functions, non-member CEU fee, etc.) including the late fee of \$10.00 for those registrations received after the deadline date.
10. Refund Policy - Registration deadline date and the date after which no refunds will be sent.

Decorations

Decorations committee is in charge of decorations for the entire conference. This includes:

- General session and/or education rooms
- Banquet and other special conference functions
- Welcome party
- Luncheon table favors/invitations provided by next year's hosting chapter

Affiliated Donations

Donations should also be solicited from the area healthcare community. Often hospitals, physicians, group medical practices, pharmaceutical representatives, insurance companies, pharmacies, uniform shops, clinical supply companies, etc. are willing to donate funds or services to help make the conference a success.

Nonmember Medical Assistants

Non-member Medical Assistants shall be charged an additional fee of \$40.00. Those nonmembers who elect to join ISMA during the ISMA Conference will receive a refund of the additional \$40.00 upon providing proof of enrollment to the ISMA Conference Treasurer.

Students

Students currently enrolled in a medical assisting program will not be charged a registration fee to attend the educational sessions of the seminar. If CEUs credits are desired, then member will be charged full registration.

Students wishing to participate in any meal functions will be charged for only the cost of the meal(s). The cost of providing breaks for student members will be absorbed by ISMA. Students attending, including those only attending the educational sessions must be registered by the deadline date. Students registering after the deadline date are subject to the late fee of \$10.00.

Welcome Party Committee

Plan the Welcome Party using the ISMA Conference theme and appropriate group participation activities, favors, decorations and prizes. The Welcome Party is usually the first day of the conference. Costumes are optional following the conference theme.

1. Work with hotel to set up space availability and time for the welcome party.
2. Provide information to the ISMA Registration committee chair of time frames and location of the party for inclusion on the registration form.

3. Determine with the hotel catering department what items must be purchased through the hotel for the party or whether food items can be brought in from the outside. (In most hotels, if the party is being held in a suite, all food, beverages, etc. and be brought in from the outside, but when held in a banquet room those items must be provided through the banquet/catering department).
4. Keep ISMA Conference chair apprised of any special needs, expenses, etc.

Education Committee

In keeping with the primary goal of ISMA, the Conference Committee will strive to obtain a maximum number of Continuing Education Units (CEU) for the attendees of the conference. This committee should plan a well-coordinated agenda. Preparation should include:

1. Complete agenda schedule allowing time for all business sessions, avoiding conflict in important meetings, and try to schedule so members can absorb and take home the maximum in information material. Time should allow for members to view exhibits. Avoid a tight schedule. Allow for flexibility.
2. Selection of outstanding speakers who have knowledge and expertise in their given fields. Confirmation of their appearance should be obtained.
3. Topics should be varied to include CEUs in all categories (administrative, clinical and general). Review of previous education topics approved thru AAMA should be made to prevent repetition. There are five categories of educational content: Anatomy, Physiology, and Terminology, Human Relations/Psychology, Law and Ethics/Economics.
4. The program should be submitted to the AAMA Continuing Education Committee for their approval and subsequent granting of CEUs. Specific instructions are included when applying for CEUs in the package from the Education Committee of AAMA.
5. The Chairman of this committee or any person she so designates should preside at each meeting. Introduction of the speaker should be kept short. A brief summary of the speaker's achievements is all that is necessary. The correct pronunciation of all names of persons to be introduced is important.
6. Copy for a printed program and an appropriate theme should be developed.
7. Properties required for each meeting should be obtained. These are usually available from the meeting facility, except for small items, or the speaker may prefer to use his/her own, or you may rent one.
 - PA system,
 - Whiteboard and markers/easers
 - Overhead projector
 - Movie projector and screen
 - Slide projector and carousel
 - Water glasses and pitchers
 - Pencils-#2 for CEU applications

- Tables and chairs
- 8. When completed, give the hotel/event planner a copy of the final agenda so they will know exactly what arrangements are necessary at specified times each day.
- 9. Do everything possible to facilitate meeting and education sessions starting and stopping on schedule, e.g. door prizes for “early birds”, reminders of speech time allotted, etc.

Educational Sessions

1. Friday education sessions should be planned for the afternoon/evening.
2. Saturday education sessions will also need to be planned for the morning and the afternoon. These sessions should not run concurrent with the House of Delegates.
3. Consideration and communication with the hotel /venue should be given due to the large number of attendees expected for these sessions for adequate seating. Concurrent education sessions can be planned for Saturday, but available space will need to be a consideration.
4. The ISMA Conference chair should be prepared to answer any questions regarding the proposed educational sessions posed by the Conference Education Committee.

Speakers

Speakers should be consulted regarding any needs they may have to present their program. Needs may include, but are not limited to duplication of handouts, podium, type of microphone preferred, and any audiovisual equipment needed. A list of available equipment for rental from the hotel may be helpful as a checklist. The hotel may furnish some of this equipment at no additional charge. Other sources may also be available to the meet the needs of the chapter in providing the necessary equipment (i.e. area schools, hospital, civic organizations) at little or no charge. Provide Lavalier microphones for speakers when available.

One member should be the contact for the speakers. This will eliminate any duplication of effort and miscommunication. This member should be:

1. A letter should be sent to each speaker ascertaining what is expected and required by him/her. Speech titles should be obtained. Speakers should be informed as the exact time and place they occupy on the agenda and how their presentation related to the CEU a whole. The importance of time control should be stressed.
2. Insuring that the necessary equipment is available and in working order, for the speaker's presentation
3. for greeting the speaker upon his/her arrival
4. responsible for introducing the speaker
5. An allotted time should be assigned and every effort to adhere to the schedule should be made.

If the member assigned to the above courtesies is unable to perform these duties then she/he should designate another member(s) to handle these responsibilities.

Exhibitors

Initial contact letters to potential exhibitors should go out in June prior to the next annual conference and should include: (See Appendix B for a sample letter)

1. Dates and location of the conference
2. Information about ISMA and the goals of our organization
3. The cost of exhibit space, which is determined by the hotel plus \$5 to \$10 additional for conference charge.
4. Size of space available, number of chairs, tables, access to electricity, etc. provided.
5. Dates and times to exhibit and by what time setup is required. Suggested exhibit hours on Saturday are from 9am to 2pm. The availability and cost of meal tickets for functions offered during the conference.
6. A deadline for response by February 15 of the year of the conference.

Guidelines for Exhibitors (See appendix D)

Follow-up letters should be sent to prospective exhibitors by October of the fall prior to the Spring Conference. This deadline should be no later than February 15th of the year of conference. Payment must be received with the completed response.

A complimentary space may be awarded to any company, at the discretion of the Conference Chair, which provides services to the conference in excess of the cost of the space.

Documentation of these services must be provided on the final report submitted to the Conference Analysis Committee.

The names of the companies exhibiting and the representatives of those companies should be obtained. A packet should be prepared for each company that should include: a program, name tags for the representatives and any meal tickets the exhibitor may have purchased.

At least one member should be assigned during the conference to act as a liaison by greeting and assisting the exhibitors.

Any exhibitor offering a door prize should be given the opportunity to speak to the attendees.

Ideally this can be done when the door prize is awarded. Since exhibitors may wish to award door prizes at different times during the conference, the member assigned as exhibitor liaison should coordinate the awarding of door prizes with the Conference Chair and Co-Chair.

Complimentary spaces for the ISMA Historian, Ways & Means Committee, Past Presidents Committee & local chapters are to be provided when requested. Coordination of these spaces should be with the chairs of the respective ISMA committees.

Welcome folders (See appendix A)

The printed programs provided for the conference should carry out the theme of the conference. Costs of printed programs vary widely, based on several factors, including color, paper choice, artwork, length, etc. The design and formality of the program are the choice of the hosting chapter.

Printed programs could include:

1. Agenda for each day
2. CEU log of attendance (2). One for member to keep and one for the Education Committee.
3. Location and time of the mock House of Delegates
4. Location and time of the House of Delegates
5. Welcome from city or state official (i.e. Mayor, Congressman, etc.)
6. Welcome letter and introduction from the National Representative
7. Brief CV on speakers
8. List of sponsors and exhibitors or persons making any donations.

Meals

The cost of the meals is included in the cost of the registration fee. They could be for the:

1. Welcome Party (Friday)
2. Breakfast/brunch (Saturday)
3. Awards and Installation Luncheon (Saturday)

A head table should be provided for ISMA officers, AAMA representative and any special guests for the Luncheon.

Lunch may need to be provided for the pre-conference meeting on Friday at an additional cost to each Executive Council member and attendees during the pre-conference meeting.

Meals for guests should be offered and the cost of each meal should be noted on the registration form, so that members wishing to purchase additional meal tickets can do so when they register.

Standing Rule #7 (Revised 2000)

Expenses for the ISMA Annual Conference will include AAMA National Representative's ... incidental meals for the conference. Meals for any attending guests or speakers (and their spouses or significant other) when invited by the ISMA Executive Board or ISMA Conference Committee shall be paid by the ISMA.

Hotels will require a guaranteed number for each meal function. The conference will be required to pay for this number, regardless of how many attendees actually participate in the meal function. Be sure to ask what percentage the hotel will prepare for over the guaranteed amount (to cover any last minute registrants). The committee may wish to advise attendees to turn in any meal tickets they may not use prior to the meal so that the guarantee can be reduced or the meal tickets may be used for special guests.

Breaks

Breaks should be scheduled for Saturday morning and afternoon. The choice of what to serve at the breaks is at the discretion of the hosting chapter. Attendees will not be charged an extra fee for the breaks as this is figured into the conference fee.

Student Sessions

There could be a one hour student session conducted by the ISMA Education Committee or AAMA National Representative. The Conference Chair will coordinate with the Chair of the Education Committee regarding scheduling, equipment and space needs. Any expenses incurred for space or equipment needs are considered conference expenses. If there are door prizes, handouts, giveaways, etc. they are the responsibility of the Education Committee.

ISMA President Responsibilities

The President's theme should be used whenever possible.

The ISMA Conference Chair should keep the ISMA President informed on all matters regarding the conference.

1. The President provides AAMA correspondence in regards to the AAMA National Representative choices to the Vice President.
2. Presides over the meeting sessions at the annual conference.
3. The President is responsible for seeing that the ISMA Officers are introduced to the attendees during such functions as the Luncheon.

4. Write letters of invitation, if applicable, to all ISMA Advisors, inviting them to attend conference. Advisors' spouses should be extended complimentary invitation to the Saturday luncheon.
5. Provide a guest list for each function, both paying and non-paying, to the conference chair at least one month before conference. President and President-Elect provide list for Luncheon.
6. Supervise head table seating and reserve seating for all meal functions.
PLEASE NOTE: The President is in charge until the incoming President is installed, however, we suggest the President and Vice President work together regarding special guest seating of the luncheon, etc.
7. The President presides during the Installation/Awards Luncheon.
8. Should work with the conference chair to determine the schedule for the House of Delegates.
9. Invite head table guests for the luncheon and advise conference chair in preparing table place cards.

ISMA Vice President Responsibilities

1. The Vice President chooses the AAMA Representative and the Vice President makes contact through AAMA to the representative. The representative should be allowed a one-hour networking session. (ISMA pays for the AAMA Representatives hotel accommodations, meals and registration fee).
2. Choose and work with the installing officer to make all arrangements for the ceremony. The installing officer is responsible for providing and coordinating her needs (decorations, table, microphone, etc.) with the conference chair.

AAMA Representative (optional)

The ISMA Vice President selects the representative, notifies the ISMA President of their choices and the ISMA President will be responsible for requesting that a representative from AAMA attend the conference. Once the representative has been assigned the ISMA Conference Chair will be responsible for contacting her/him with details of the conference.

The Conference Chair will also coordinate scheduling any time and/or space the AAMA Representative needs for any member forum. Refer to standing rule #7.

Standing Rule #7 (Revised 2000)

Expenses for the ISMA Annual Conference will include AAMA National Representative's lodging, registration, and incidental meals for the conference.

The Conference Chair will make sure registration, hotel room reservation, and meals during the conference and transportation from the airport have been arranged for the AAMA National Representative.

The ISMA Vice President should be assigned to the AAMA National Representative for the duration of the visit.

A hospitality gift may be provided for the AAMA National Representative. Please consider gifts to be appropriate for travel.

ISMA Physician Advisors

The ISMA President will write a letter to each physician advisor issuing a special invitation to the annual conference and include a copy of the registration form. Since the Physician Advisors and their spouse will be considered special guests and not receiving CEU credits, there would be no registration fee.

The ISMA President will provide a list of attending ISMA Physician Advisors/guest for each function to the conference chair at least one month before conference.

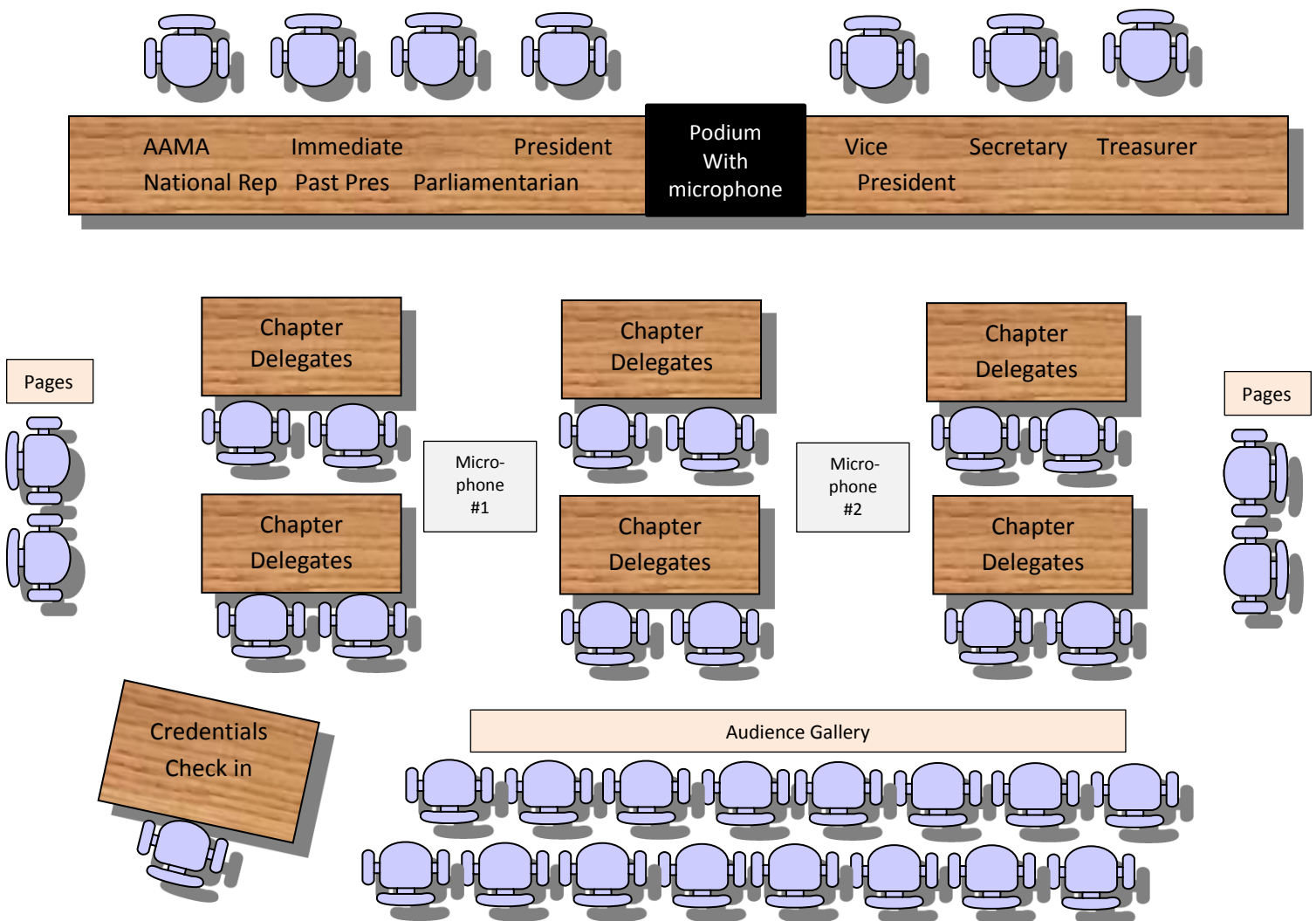
The ISMA Conference Chair will appoint a host/hostess to greet and escort the Physician Advisors.

The ISMA President should be made aware of the attendance of any ISMA Physician Advisors, so they can be recognized during the conference.

House of Delegates

Provide meeting space for the House of Delegates. The Conference Chair will coordinate with the ISMA State President regarding the needs of the House of Delegates including:

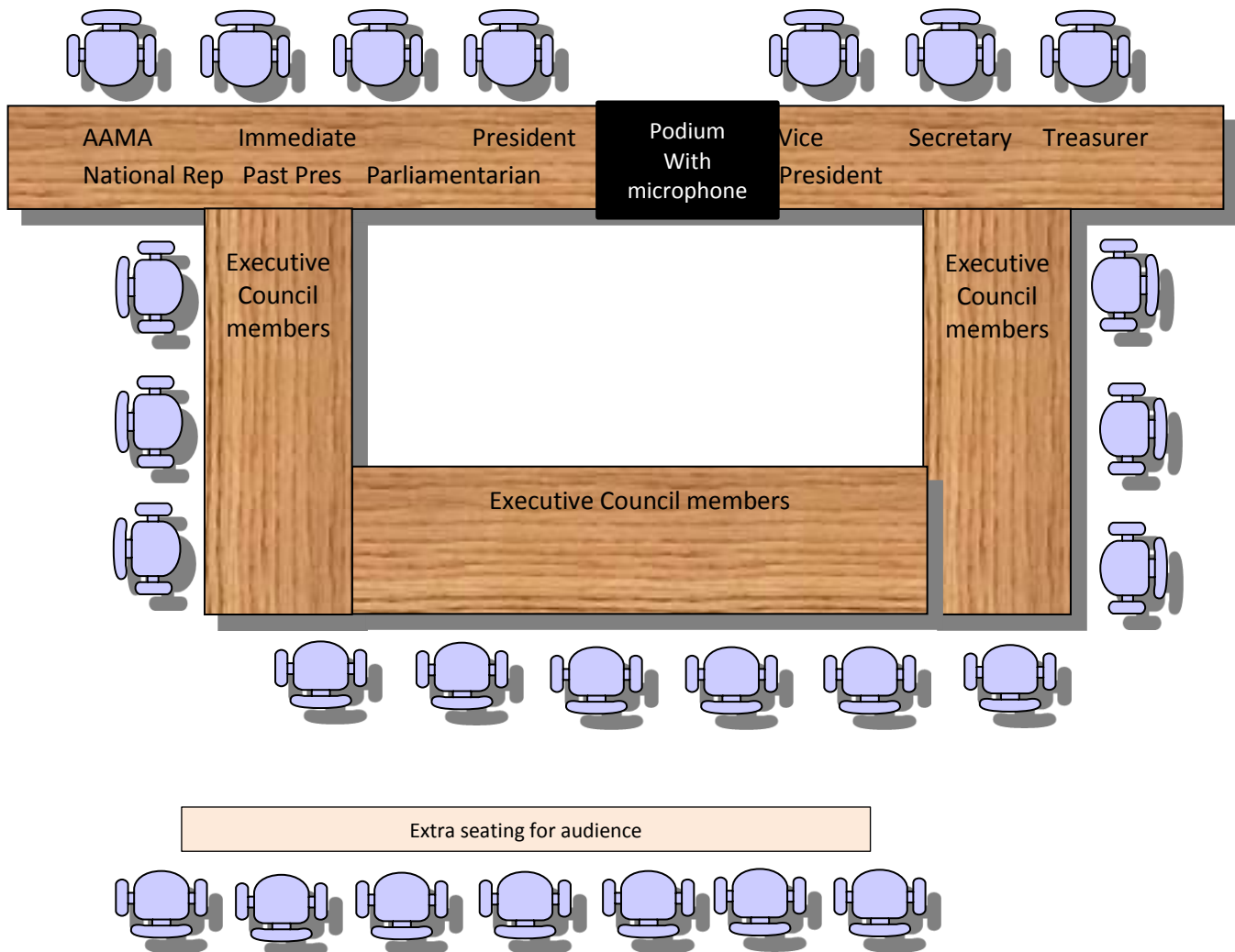
1. room size to accommodate
2. seating arrangement - seating delegates for each component chapter together, according to Chapter alphabetically
3. head table
4. credentials table
5. any special arrangements
6. The audio equipment



ISMA Executive Council Meetings

There will be a Pre-conference Executive Council meeting on the Friday of the conference. The time should be coordinated with the current ISMA President and the Conference Chair. A Post-conference Executive Council meeting will be held Saturday evening or Sunday morning after the last session of the conference. The time for this meeting should be coordinated with the current ISMA President-Elect in advance.

Each board meeting will require a head table with seating for the ISMA officers and AAMA representative and a podium for the presiding officer. Allow for extra seating for the ISMA delegates and ISMA members that may be attending.



Door prizes/Drawings/Gifts/Donations

1. Determine the drawings that will happen at ISMA conference and have tables available for each drawing.
2. Arrange for the drawings and distribute the door prizes during breaks and between CEU sessions.
3. Work with the hosting chapter to determine whether door prizes are going to be given. All chapters may be asked to participate in securing prizes. A letter could be sent to each chapter requesting door prizes if that is the option.

Door Prizes

Providing door prizes to the attendees is at the discretion of the hosting chapter. The hosting chapter may request donations of door prizes from component chapters. Storage and distribution of the door prizes is at the sole discretion of the hosting chapter. Expenses related to door prizes are considered chapter and not conference expenses.

Flowers

Conference committee should provide a listing of locations to obtain flowers, corsages and/or boutonnieres which may be provided for:

- State Officers
- AAMA Representative
- Special guests

Individual chapters may want to purchase flowers, corsages and/or boutonnieres to honor their president. It is suggested that advance orders be taken for these corsages. (See Appendix C for a sample of a suggested letter.)

Any floral arrangements deemed necessary for decorative purposes should be kept to a minimum, thereby helping to keep down the expenses of the conference.

Guest Seating and Protocol

Honorees to be seated at the head table:

1. ISMA State officers
2. AAMA National Representative (if invited)
3. Presiding Conference Chair
4. Speakers
5. Guests
6. If other National Officers and/or chairs are present, they should be seated at a “special” table directly in front of the head table.

NOTE: If seating becomes difficult and cumbersome at one head table, another may be used on a different level.

General Head table Protocol

Place cards should be used. The ISMA President is not always the presiding chair but the ISMA President should extend greetings and present the presiding chairman.

Seating

1. The ISMA President is always seated in the center right, whether or not she is the presiding chairman.
2. If someone else is presiding, that presiding chairman is always seated center left.
3. The ISMA officers and guests of honor are divided on either side in order of rank.
4. Installing Officer and person giving the invocation although it is usually one of the aforementioned.
5. Other guests are seated at the second head table if any overflow occurs.
6. At the luncheon, the Presidents of all chapters and the ISMA Past Presidents may be seated at second/third reserved table. Recognition to be made to the ISMA Past Presidents and component chapter.
7. Due recognition should be made to the President of the hosting Chapter upon introductions.

Banquet/Luncheon

The ISMA President has the privilege of choosing an installation officer. The installation service for the incoming ISMA President should be coordinated with the installing officer, including any special needs: microphone, table, etc.

Photographer

The Conference Chair may secure the services of a photographer if desired.

Group pictures will be scheduled for each chapter. Each chapter will be informed of where and when these pictures will be taken. Often a schedule is provided in the registration packet. The location should be one that is uncluttered and out of the mainstream of hotel traffic.

The photographer should be prepared to collect money and take orders for the pictures.

Photographers often ask for an initial fee for supplies and then work on commission. Photos could be requested by the Conference Chair for the ISMA History book.

Welcome Party /Special Events

Friday evenings are available for any special event the hosting chapter would like to plan. Charges for these events should be stated on the registration form. Since these events are optional and are an additional cost to the participant, any minimum attendance requirements should be considered when planning and pricing these events. The details of the event and appropriate dress should be communicated on the registration form.

Invitation to Future ISMA Meetings

The Conference Chair should allow time at the Saturday luncheon for an invitation to the next ISMA conference. A brief invitation should be made by the Conference Chair of the next year's ISMA conference.

Sponsorship

The American Association of Medical Assistants and its state societies are exempt under section 501(c) (6) of the Internal Revenue Code. Unlike 501(c) (3) bodies, 501(c) (6) associations cannot receive grants or charitable contributions that are tax deductible for the grantor or donor. However, 501(c) (6) corporations are permitted to receive "qualified sponsorship payments" from corporations and other entities. A "qualified sponsorship payment" is any payment by an entity engaged in a trade or business with respect to which there is no arrangement or expectation that such entity will receive any substantial return benefit other than the use or acknowledgment of the name or logo or product lines of such entity's trade or business in connection with the activities of the organization that receives such payment. Qualified sponsorship payments are generally deductible by the payer corporation as ordinary and necessary business expenses under IRS regulations.

State societies or component chapters that want to solicit corporate sponsorships should use language such as the following:

We would appreciate it if your company would sponsor our XYZ educational program. We have three sponsorship levels: Gold—\$1,000 entitles you to have your company's name, logo, and product lines featured prominently as a Gold Sponsor on promotional literature and signage relating to the event; Silver—\$750 entitles you to have your company's name and logo featured prominently as a Silver Sponsor on promotional literature and signage relating to the event; Bronze—\$500 entitles you to have your company's name featured prominently as a Bronze Sponsor on promotional literature and signage relating to the event. Please be aware that in soliciting and accepting such a sponsorship from your company, our association specifically: (1) does not engage in or allow the advertising of your company's products or services in connection with the event, including messages containing qualitative or comparative language, price information, or other indications of savings or value; (2) does not endorse such products or

services; and (3) does not induce its attendees and members to purchase, sell, or use such products or services.

Chapters having questions or concerns regarding sponsorship should contact the AAMA Executive Director.

Appreciation

Letters of appreciation should be written immediately after the end of the conference to all sponsors, contributors, speakers and any others who gave special assistance to the conference (see Exhibit E for a suggested letter). The Conference Chair is responsible seeing this task is completed. This is an extremely important aspect of our continued good relationship with those who helped make our conference a success by either donating their time, money and/or knowledge.

Guideline Revisions

It is requested that the ISMA Conference Chair make any suggestions for changes or additions to the guidelines to the ISMA Executive Board during any stage of planning the conference.

The Mentoring Chair will be responsible for providing a copy of the current edition of the:

- Conference Guidelines
- Exhibitor Letters
- Chapter Donation Letters
- Appreciation Letters

=====

APPENDIX A – Sample Conference Registration Form

Email Notice

Date:

To: ISMA membership:

Re: ISMA 2011 Conference

In our attempt to continue to go green and cut down of conference costs to the membership, registrations for the ISMA 20__ Conference will be posted to the website instead of mailed. The planning committee is also planning to post the PowerPoints from the speakers so members will be able to print a copy if they so wish to bring with them.

Please watch the ISMA website at www.iowasma.org for upcoming information.

Name, CMA (AAMA)

20__ ISMA Conference Chair

Postcard Notice

Example:



Conference Program

Example:

IOWA SOCIETY OF MEDICAL ASSISTANTS ANNUAL CONFERENCE MARRIOTT, CEDAR RAPIDS, APRIL 15 & 16, 2011

Friday, April 15, 2011

Noon-4:00	Registration	
1:00-3:00	Pre-Convention Council Meeting	
3:30-4:30	Dr. Laura Ledger	Bringing Mind, Body & Spirit into Equilibrium
4:45-5:45	Jim Hirons	Balance Walking for Health
6:00-7:00	Sarah Babcock	ICD-10 Update
7:00-7:30	Mock House of Delegates (HOD) meeting; Required for Delegates & Alt. Delegates	
7:30-??	Welcome Party with FOOD	

Saturday, April 16, 2011

7-9:00	Registration Continental Breakfast	
7:30-9:30	House of Delegates (HOD)	
8:00	Vendors set up	
8:30-noon	Visit Vendors	
9:45-10:45	Dr. Richardson	Update on Incontinence Treatment
11:00-12:00	Dr. Deardon	TBA
12:30-2:00	Lunch & Learn Installation of Officers at 1:30	Customer Service: 1 st Impressions
2:15-3:15	Bob Burnes	TBA
3:30-4:30	Joe Collins, RN,	Nutritional Support in Healthcare Practice
4:45-5:45	Stephanie Mellor, ARNP	Bio-Identical Hormonal Replacement
6:15-7:15	Post Convention Council meeting	

**Casual business dress is requested for all CEU sessions and business meetings
Cell phones must be turned off or on vibrate during sessions**

This agenda is subject to change. 9 AAMA CEUs applied for.

Registration Form

Example:

**IOWA SOCIETY OF MEDICAL ASSISTANTS ANNUAL CONFERENCE
HOSTED BY LINN CHAPTER
MARRIOTT, CEDAR RAPIDS, APRIL 15 & 16, 2011
REGISTRATION DEADLINE IS MARCH 20, 2011**

Please print CLEARLY

NAME _____	CMA (AAMA) _____ RMA _____
ADDRESS _____	Member _____ Non-member _____
_____	Delegate _____ Alt Delegate _____
HOME PHONE _____	Student _____ First-timer _____
WORK PHONE _____	Past President (State) _____
CHAPTER _____	President (Chapter) _____
	YES _____ NO _____
NEW CMA since April, 2010	
I WILL ATTEND THE FRIDAY NIGHT WELCOME PARTY	YES _____ NO _____

Please check all that apply:

<input type="checkbox"/> Member: full registration	\$ 120.00*
<input type="checkbox"/> Non-member: full registration	\$ 160.00*
<input type="checkbox"/> Student (NO CEUs or meals)	\$ 0.00**
<input type="checkbox"/> Education only, Member	\$ 75.00
<input type="checkbox"/> Education only, Non-member	\$ 115.00
<input type="checkbox"/> Welcome Party ticket Friday	\$ 19.00***
<input type="checkbox"/> Breakfast & Lunch Saturday	\$ 35.00***

* Includes Welcome Party, Breakfast, Lunch and Education Sessions
** Education Sessions are free to students (must be currently enrolled in a program)
*** Name tags will reflect meals purchased

Make check payable to:
LINN CHAPTER 2011 CONFERENCE

Mail Registration to:
Bev Philpott CMA (AAMA)
2345 Coventry Court
Marion IA 52302-6137

Casual business dress is requested for all CEU sessions and business meetings

9 CEUs APPLIED FOR THROUGH AAMA

Please fill out the above registration form completely.
This will help us to register everyone correctly.

Refunds requested prior to 4/07/11 will be assessed a \$20 fee. No refunds after 4/08/2011.
THERE WILL BE A LATE REGISTRATION FEE OF \$10.00 AFTER MARCH 20, 2011

GOING GREEN: We plan to have speakers' handouts on the website for you to print and bring to the conference. We will not have copies at the conference if they are available on the web.

Marriott Hotel 1200 Collins Road NE Cedar Rapids IA 52402 1-800-396-2153	Hotel Information: Double occupancy \$89.00 Check-in time 4:00pm Check-out time noon
--	--

We have reserved a block of rooms. Ask for the Iowa Society of Medical Assistants block.
Book rooms by **MARCH 20, 2011**

Evaluation of Conference Form

APPENDIX B- Sample Exhibitor Letter



Date: _____

Dear Exhibitor:

The Iowa Society of Medical Assistants, Inc., an affiliate of the American Association of Medical Assistants, will be having its annual conference, date at the location in City, Iowa. The host chapter name will be the hosts for this event.

The American Association of Medical Assistants is a tri-level, non-profit organization of medical assistants who work under the supervision of a physician. This includes those working in allied health fields.

We invite your company to exhibit at this state wide event. A space, with an eight foot skirted table and two chairs will be provided at a cost of \$_____. Since the spaces are limited, please respond as quickly as possible. This is an ideal opportunity for you to make contact with medical assistants from all across the state. You will be given a list of the attendees and their employers and you will be introduced to the assembled body. If you do not wish to exhibit, but would like to support our organization, a donation will be gratefully accepted and acknowledged to the attendees.

Exhibits will need to be set up and ready for display on Saturday, date from 9:00 a.m. to 2:00 p.m. (Set-up time at 8:00a.m. and take down at 2:30pm). Lunch tickets for Saturday are available at an additional fee of \$_____.

Reservations will be accepted on a first come, first served basis. The attached form should be completed and mailed no later than February 15, 20____. Space is limited to 10 exhibitors and will be allocated on a first come first serve basis. We typically have about 200-250 attendees from all over the state of Iowa.

If you have any questions, please feel free to call me at the number below. We hope you will be joining us.

Sincerely,

Name, CMA (AAMA)
2011 ISMA Conference Chair
Address
State, IA 52776
Phone:
Email:

Exhibitor Response Form

____ **YES**, our company would like to support the Iowa Society of Medical Assistants by exhibiting at the 2011 ISMA Conference.

COMPANY: _____

CONTACT: _____

ADDRESS: _____

PHONE: _____

Email: _____

Our check for \$_____ made payable to "ISMA 20____ Conference" is enclosed. Please reserve space for us. We **will/will not** require access to an electrical outlet for our exhibit. We understand that we will receive a confirmation letter upon the receipt of our check with details regarding setup dates and times.

____ **NO**, we are unable to exhibit at the ISMA Conference, however we would like to support your organization and we have enclosed a donation.

____ \$50.00 ____ \$100.00 ____ \$150.00 ____ \$200.00 ____ \$_____

Deadline by Feb 15, 20____.

CHECK PAYABLE TO: ISMA 20____ CONFERENCE

MAIL TO:

Name, CMA (AAMA)

20____ ISMA Conference Chair

Address

City, IA 52776

Phone:

Email:

Thank you for your support of our organization

APPENDIX C – Sample Letter for Chapter



Linn Chapter Medical Assistants

 Date

Dear Chapter President:

The Hosting chapter name is hosting the 20__ Conference to be held in city, IA date. This is the main source of income for the Iowa Society of Medical Assistants and we need your help. We are asking you to contribute \$_____ to help defray the costs of the conference. Your donation will be much appreciated and help to keep our society on strong financial ground.

Corsages for each chapter president will be available for the banquet. The cost of flowers for each chapter president will be \$_____ and should be prepaid.

You should make your checks payable to ISMA 20__ Conference and mail them to _____, no later than April 1, 20__.

Thank you for your assistance in making the 20__ Conference the best yet!

Sincerely,

Name, CMA (AAMA)
20__ ISMA Conference Chair

cc: ISMA President
cc: ISMA Vice President

APPENDIX D – Exhibitor Guidelines



_____ Chapter Medical Assistants

Guidelines for Exhibitors

We welcome you as a supporter of our organization and have developed these guidelines to prevent any embarrassment to either yourself or our organization.

1. Each attendee will be asked to visit your display before and between the educational sessions. An ideal way to obtain valuable contact information is to offer a door prize that the attendees must fill out an entry form in order to be eligible to win. You will be offered a time to draw for this door prize during the meeting. The time should be coordinated with your contact with the hosting chapter.
2. If you are offering items for sale there are certain restrictions that must be followed.
 - a. As the term Certified Medical Assistant® is a registered trademark of the American Association of Medical Assistants it is not permissible to sell items with that term or the CMA logo.
 - b. You are also not allowed to use Iowa Society of Medical Assistants, Inc. or ISMA on any of the items you offer for sale, since our logo is reserved for use only by our state society.
3. Your support is important to our organization and we welcome your comments. Please feel free to share your observations with the hosting chapter on how we can make your experience at our state meetings more worthwhile for you and your company

APPENDIX E – Sample Appreciation letter



_____ Chapter Medical Assistants

_____ *date* _____

Dear Contributor:

The _____ Chapter of the Iowa Society of Medical Assistants, Inc. an affiliate of the American Association of Medical Assistants, would like to thank you for your generous contribution of _____ the ISMA annual Conference held on _____ *date* _____ at the _____ *Location/motel* _____, _____ *city* _____, IA.

Over 200 members and medical assistants from across the state of Iowa were in attendance at this event. Your contribution was noted in the registration packet received by each attendee and was announced to the attendees.

Thank you again for your generous contribution and we appreciate your help in making the ISMA ____th Annual Conference an unqualified success!

Sincerely,

Name, CMA (AAMA)

20____ ISMA Conference Chair

cc: ISMA President

