

CONFERENCE AND CONVENTION PROCEDURE MANUAL



Guidelines for Planning and Organizing
Conferences and Conventions
for the Michigan Society of Medical Assistants

Conference and Convention Procedure Manual

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Originally published by:
Michigan Society of Medical Assistants
2003-2004 Conference Advisory Committee

Updated by:
Michigan Society of Medical Assistants
2016-2017 MSMA Ad Hoc Documents Committee

Website: www.msmaonline.org

INTRODUCTION

It is the intent of the Michigan Society of Medical Assistants (MSMA) to provide guidelines in an easy to follow format for planning and organizing conferences and conventions on behalf of medical assistants of the MSMA. As a procedure manual, its purpose is to help provide chapter(s), or committee(s) with instant, necessary information in a logical format for immediate use that can be incorporated into the tasks of planning and organizing conferences and conventions.

Numerous templates and tables are included to enhance the reader's understanding of the procedures and processes contained in putting on a conference or convention for the organization. It is our belief that this manual will provide the reader consistency in the planning and implementation of all conferences, educational offerings, and contracting services, plus a greater understanding of the procedures and tasks involved in planning and organizing and the expertise necessary to be successful.

It is the belief of the MSMA that the Conference and Convention Procedure Manual will be an invaluable quick reference for all members desiring to plan and organize a conference or convention.

A special **THANK YOU** to the many contributors, and the MSMA Ad Hoc Documents Committee, who have shared their knowledge, time, and expertise in the development of this manual. We wish to express our gratitude for their professionalism and desire to share with the reader(s) their excellence in leadership.

On behalf of the MSMA and the Conference Liaison Committee, we extend to you great success in your endeavors in planning and organizing the next conference or convention of the Michigan Society of Medical Assistants and **THANK YOU** for being one of the great leaders who continue to move this organization forward.

**Reviewed, updated, and reorganized by the
2016-2017 MSMA Ad Hoc Documents Committee**

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CONFERENCE LIAISON COMMITTEE GUIDELINES

PURPOSE: To act as liaison, mentor, and guide to Chapter(s) hosting MSMA Conferences and Conventions

REPORTS TO: MSMA President, MSMA Board of Directors

1. Chair shall attend all Board of Directors Meetings and submit a report of all committee activities, with copies to all committee members.
2. The MSMA Fall and Winter conferences will take place in one central location (Midland, Cadillac, Mt. Pleasant, etc.) to increase flexibility with hotel costs by negotiating longer contracts. The MSMA Annual Spring Convention will be hosted by the Incoming President's chapter, whenever possible.
3. Update, as needed, the MSMA Conference Convention Manual, with access to be given to incoming conference/convention chairs.
4. Set up an orientation with the new conference/convention chairs upon Board of Directors acceptance of the bid.
5. Assist chapters in contract negotiations. Contract signed by the conference/convention chair contingent upon MSMA Conference Liaison Committee approval.
6. Maintain a list of pertinent information for all conferences/conventions for statistical data, i.e.
 - A. Registrations:
 - 1) Full registrations, member and non-member
 - 2) Education only registrations
 - 3) Student, member, and non-member registrations
 - 4) MSMA Past President's registrations
 - B. Exhibitors
 - C. Sponsors
 - D. Speakers and Topics
 - 1) Need to coordinate this with the Education Committee. Must obtain objectives or syllabus from speaker with resume or credentials and submit to Education Committee for AAMA approval.
 - E. Mentor chapter conference/convention chairs as future Conference Liaison Committee members.
7. MSMA Conference Committee Members will submit expenses on a MSMA Expense Voucher to the Conference Liaison Chair for approval.
8. MSMA Conference Liaison Chair will submit all expenses to the MSMA President.
9. MSMA Conference Liaison Chair will submit an annual report to the MSMA House of Delegates as directed by the Speaker of the House.

CHAPTER RESPONSIBILITIES

When Hosting an MSMA Conference or Convention
(Should be discussed with chapter members prior to placing the bid to host)

- 1. Appoint a Conference/Convention Chair and vice-chair.
 - A. To work with the MSMA Conference Liaison Committee to negotiate the hotel contract
 - B. Budget and Finance (with the chapter's Treasurer)
 - C. Will serve as a voting member of the MSMA Board of Directors during the year of the conference/convention, and will attend all MSMA board meetings.

- 2. Appoint Committee Chairs – These are suggested guidelines only and may be combined. It is up to the chapter to determine how many chapter members will be involved.
 - A. Registration Chair – Receives registration forms and checks from members.
 - B. Hospitality and Reception – Usually all chapter members participate and welcome attendees, suggest restaurants in the vicinity, etc.
 - C. Education Chair – Oversees speaker selection and applies for CEUs from AAMA.
 - D. Exhibitors – Contacts and secures exhibitors.
 - E. Donations and Sponsors – Seeks donations and possible sponsors for functions, i.e. breaks, welcome party.
 - F. Ways and Means – Solicits and obtains raffle items from chapter members, local businesses, etc. Any monies collected from chapter raffles or 50/50 will stay with the chapter.
 - G. Printed Program – Prepares and has printed a brochure/booklet for inclusion in the registration folders for attendees; secures advertisements for the program.
 - H. Entertainment – May plan a welcome party and/or evening social function, i.e. Halloween party if hosting a Fall Conference. Generally, this function (if held) is the financial responsibility of the hosting chapter. May solicit donations to help cover the cost.
 - I. Protocols – Arranges for special seating for officers and guests, i.e. reserved tables at meal functions, head tables, etc. (*see protocol sheet*).
 - J. Decorations – For luncheon tables, head table, etc., if chapter wishes.

- 3. Select committee meeting dates and hold regular meetings to report on the progress of the committees. The chair will submit reports to MSMA at the regular board meetings during the year of the conference/convention.

- 4. Contact the Conference Liaison Chair, or members, who can provide invaluable information on finances and other responsibilities.

- 5. Decide on a theme for the conference. If hosting an Annual Convention, consult with the Incoming President (President-Elect) regarding convention theme to coincide with his/her speech.

A copy of the most current MSMA Standing Rules will be attached.

Michigan Society of Medical Assistants

CONFERENCE/CONVENTION BID APPLICATION

This is a request for _____ Chapter to host
the _____ Conference/Convention on _____
(proposed date) at the _____
(proposed location).

With _____ as Conference Chair.

Date submitted: _____ Chapter President: _____

Date received: _____ MSMA Conf Liaison Chair: _____

BOD approval date: _____ MSMA President: _____

****IMPORTANT INFORMATION****

The MSMA Board of Directors must approve the following:

- Chapter bid to host a conference/convention.
- Appointment of conference/convention chair.
- Dates and location of conference/convention.
- Conference/convention registration and agenda.

All Conferences and Conventions are official functions of the Michigan Society of Medical Assistants, and are subject to the MSMA Bylaws and Standing Rules

PROCEDURE FOR SITE SELECTION



1. Consider the following criteria when selecting conference/convention date and making site selection
 - A. Conference/Convention dates should not conflict with a religious/national holiday or AAMA National Convention
 - B. Choice of facilities to be considered
 - 1) Hotel/Motel
 - 2) Convention Centers
 - C. Amenities offered
 - D. Professional setting in a clean, safe environment
 - E. Adequate meeting rooms
 - 1) Accommodate classroom and/or theater style seating
 - 2) Banquet facilities
 - 3) Concurrent sessions and/or business meetings
 - 4) Minimal or no charge for meeting space based on room nights or food
 - 5) Handicap accessibility
 - F. Available audiovisual and hook up
 - G. Parking
 - H. Adequate restroom facilities, handicap accessibility, elevators
 - I. Restaurants in or near facility
 - J. Exhibit space (1-15 exhibitors); should be located strategically for traffic flow and visibility
 - K. Sleeping rooms
 - 1) Block of 20-40 (based on approximate numbers of registrations)
 - 2) Double, Queen, and King rooms
 - 3) Minimal charge for rooms for group
 - 4) Complimentary rooms

PROCEDURE FOR CONTRACT NEGOTIATION

1. Lodging
 - A. Available guest rooms – Check on group rate (rooms are quoted per night and are subject to all applicable state and local tax).
 - B. Date guest room block will be held for reservations for attendees to call in. Rooms not reserved by this date will automatically be placed for general sale without a penalty from hotel.
 - C. Phone number listed for reservations and which group to refer to. Cancellation deadline to avoid being charged a fee equal to one nights' lodging rate and tax.
 - D. Check in and check out times – Accommodations for early arrival and late check out times due to Board of Directors meetings.
 - E. Negotiate a credit fee (or discounted fee) toward function room rental for every occupied lodging in the MSMA group block if there will be a charge for meeting room facilities (or food amount).

2. Meeting room facilities and access to audiovisual equipment. Obtain cost of meeting room facilities and equipment. Negotiate waiving meeting room cost if certain number of registrants are also registered hotel guests. Negotiate complementary use of equipment.

3. Catering Services
 - A. Meal selections cost including tax and gratuity and maximum guarantees for meal attendance.
 - B. Deadline date to call or fax numbers to Catering Department and how MSMA will be charged (either number of guarantee or the actual number of attendees, whichever is higher). Stated percent the Catering Department will prepare above your guaranteed number.
 - C. Details on room set up, audiovisual equipment, menus, and decorations.

4. Room Reservations
 - A. Room list for special arrangements for State President, visiting AAMA Representative, and Conference/Convention Chair; the manner in which these rooms will be reserved (Direct bill to MSMA account).
 - B. Check to see if hotel gives complimentary rooms based on the number of rooms reserved. If so, use these rooms for the MSMA President, AAMA Representative, or Conference/Convention Chair.
 - C. Room is reserved by attendees and will be accompanied by first night room deposit or guaranteed with a major credit card.

5. Billing
 - A. Name of individuals who can make changes to bill – usually the Conference/Convention Chair.
 - B. Conference billing charges are the responsibility of the MSMA and should be to the attention of the Conference/Convention Chair.
 - C. All charges will be direct billed.

6. Cancellation Policy
 - A. Cancellation deadline date
 - B. Clause on reselling cancelled rooms and this amount applied against the estimated profits
 - C. Clause regarding refund or non-refundable deposit fee

- 7. Arbitration Clause and Acts of God
- 8. Signing the Contract
 - A. Right to renegotiate agreement
 - B. Compensation
 - C. Damage or losses and a compensation agreement (needs to be made prior to departure if possible)
 - D. All arrangements considered tentative until this document is signed and returned by (Date) along with a \$ _____ Deposit. (Negotiate to waive the deposit fee pending credit approval).
 - E. Lack of signed contract will result in space being released and made available for sale to other groups without further notice from hotel.
 - F. There must be two (2) signatures on the contract from MSMA; Conference/Convention Chair and Conference Liaison Chair

PROCEDURE FOR PROPOSED BUDGET

- 1. Fees charged should be large enough to cover the costs incurred but small enough to be marketable to your targeted audience.
 - A. Look at cost of previous conference/conventions or other programs in the area set registration fees accordingly
 - B. As appropriate, set a differential fee for members and nonmembers. This gives a benefit to members and provides an incentive to become members of AAMA.
 - C. Other possible expenses to be considered include marketing, speaker expenses, meeting room expenses, meal expenses, and educational materials

- 2. Using the prepared *computer template* prepare a proposed budget.

Proposed Budget Template – Double-click anywhere within the interactive template to enter data.
 Scroll within template to complete all fields.

		(insert name of Chapter) Chapter of Medical Assistants			
		Hosting MSMA (insert name of conference or convention)			
		Proposed Budget			
Income					
Exhibitors					
Advertisements					
Patron Ads					
Sponsors					
Registration Fees					
Full Package					
Education Only					
Past Presidents					
Meal Tickets					
Complimentary					
Check Advance MSMA					
				Total Income	\$ -
Expenses					
Meeting Room Expense					
Room Rental					
Podium/Microphone Rental					
AV Equipment					
Other					
				Subtotal	\$ -
Meal /Refreshment Expense					
Meals					
Refreshment Breaks					
Other					
				Subtotal	\$ -
Speaker Fees					
Meals					
Other					
				Subtotal	\$ -
Office Expenses					
Photocopy/Printing					
Postage					
				Subtotal	\$ -
Miscellaneous					
Comp Rooms and Registration					

MSMA CONFERENCE

Date
Location

REGISTRATION FORM

Please print or type the following information:

NAME: _____ CREDENTIAL: _____

NICKNAME: _____ CHAPTER: _____

ADDRESS: _____

CITY: _____ STATE: _____ ZIP: _____

TELEPHONE: (H) _____ (W) _____

EMAIL ADDRESS: _____

Please complete the following:

Have you attended a MSMA Conference before? Yes No

If you have a dietary requirement, please specify:

Gluten free Vegetarian Other _____

If you have a disability that requires auxiliary aids during the conference, please specify:

Audio Visual Mobile

*****Proof of Membership and/or Current Student ID Required at Registration Desk*****

Please complete the following:

- AAMA Member Membership # _____
- Non-Member
- MSMA Past President
- Student Institution _____

Send copy of Student ID with registration

- Saturday Only (includes registration and Sat. meals)

Reg. Postmarked by Reg. Postmarked by
Date Date

\$ Food + \$30	\$ xx.00
\$ Food + \$60	\$ xx.00
\$ xx.00	\$ xx.00
\$ xx.00	\$ xx.00
\$ xx.00 + \$30	\$ xx.00

Non-Conference Attendee Meal Ticket Prices	#	Total Amount
Friday Lunch \$xx.00	_____	_____
Saturday Breaks & Lunch \$xx.00	_____	_____
Saturday Banquet \$xx.00	_____	_____ (if needed)

Deadline for registration is Date
Payment must accompany registration.

Deadline for Hotel Reservation is Date

Make Checks Payable to: Chapter
Please put Spring Conf. in memo

Amount Enclosed \$ _____

Mail Registration and Checks to:

Name
Address
City, State, Zip Code

REGISTRATION POLICIES

1. Proof of AAMA membership and/or current student ID required at Registration Desk.
2. If an email is provided, an email confirmation of registration receipt will be sent.
3. Name badges must be worn to all MSMA Conference functions for admission.
4. Registration deadline is **Date**. Late registrations accepted only until **Date**. Cancellation policy: Written notice of cancellation must be post marked by **Date**. A \$20 administrative fee will be retained. No refunds after **Date**.
5. **Any onsite registrations cannot be guaranteed food.**
6. Returned checks will be assessed an administrative fee of the current bank rate.
7. Total CEUs based on actual contact hours. You must attend 90% of each session to earn CEUs. Agenda subject to change.
8. Education sessions subject to change and pending approval with MSMA Educational Committee and AAMA.
9. Eligible non-members may join AAMA with completion of an application.
10. In accordance with the Americans with Disabilities Act, please contact **Name** at **Phone** or **Email** for accommodations.

ROOM RESERVATIONS

Name of Hotel

Street Address

City, State, Zip Code

1. Reservations for the Conference will be made by individual attendees directly with **Name of Hotel** at **Phone Number**.
2. Group Name: **Michigan Society of Medical Assistants.**
3. The room rates are as follows:
2 queen beds: \$ xx.00 plus tax
1 King bed: \$ xx.00 plus tax
Complimentary breakfasts included with room for registered guests. **(If appropriate)**
4. Reservations must be accompanied by a first night room deposit, or guaranteed with a major credit card.
5. Room reservations received after the deadline will be subject to availability.
6. All questions or concerns should be directed to the hotel. MSMA does not accept any responsibility for the room reservations.
7. If any difficulties arise with making reservations under the Michigan Society of Medical Assistants, contact **Name** at **Phone Number**, email **_____**.
8. Hotel Reservation deadline is **Date**.



MICHIGAN SOCIETY OF MEDICAL ASSISTANTS

Conference

Dates
Hotel
Address

Sample Agenda for Fall or Winter Conference

****topics and speakers are subject to change pending AAMA approval****

Friday Date

7:00 - 8:30 pm Registration

Saturday Date

7:00 – 9:00 am Breakfast **

7:30 – 9:00 am Registration **

8:00 – 4:00 pm Vendor Booths open

8:00 – 9:00 am Speaker

9:10 – 10:10 am Speaker

10:15 – 10:30 am Mid-morning Break

10:30 – 11:30 am Speaker

11:40 – 12:40 pm Speaker

12:45 – 1:45 pm Luncheon **

2:00 – 3:00 pm Speaker

3:00 – 3:15 pm Afternoon break

3:15 – 4:15 pm Speaker

4:30 – 5:30 pm Speaker

5:30 pm Raffles and 50/50 **

Dinner on your own

Sunday Date

7:00 – 9:00 am Breakfast **

9:00 – 3:00 pm Board of Directors meeting **
(Members are welcome to attend – no CEU's given)

9:00 – 10:30 am Speaker

10:35 – 12:05 pm Speaker

Items with ** must be on agenda, times are variable



MICHIGAN SOCIETY OF MEDICAL ASSISTANTS YEAR ANNUAL SPRING CONVENTION

Dates
Hotel
Address

Sample Agenda w/Installation Luncheon

All topics are pending MSMA approval and AAMA CEU and speaker approval. Topics, speakers and times are subject to change.

Thursday, Date

6:30 – 8:30 pm Registration **
7:00 – 9:00 pm Speaker

Friday, Date

7:00 – 9:00 am Registration **
8:00 – 9:00 am Breakfast **
8:30 – 9:00 am Credentialing – House of Delegates (HOD) **
9:15 – Noon House of Delegates (HOD) **
12:15 – 2:15 pm President's and Awards Luncheon **
2:30 – 3:00 pm Credentialing – HOD p.m. session **
3:15 – 7:00 pm House of Delegates **

Saturday, Date

7:00 – 9:00 am Registration **
8:00 – 9:00 am Breakfast **
8:00 – 10:00 am MSMA Past Presidents' Breakfast **
8:00 – 5:00 pm Vendor Booths
8:00 – 10:00 am Speaker
10:15 – 12:15 pm Speaker
12:30 – 2:30 pm Installation Luncheon **
3:00 – 5:00 pm Speaker
5:15 – 5:45 pm Chapter Member Forum/Snacks
5:45 – 6:15 pm Raffle
6:30 – 7:30 pm Speaker

Sunday, Date

8:30 – Noon Board of Directors Meeting **
9:00 – 11:00 am Speaker

Items with ** must be on agenda, times are variable



MICHIGAN SOCIETY OF MEDICAL ASSISTANTS
YEAR ANNUAL SPRING CONVENTION

Dates
Hotel
Address

Sample Agenda w/Installation Dinner

All topics are pending MSMA approval and AAMA CEU and speaker approval. Topics, speakers and times are subject to change.

Thursday, Date

6:30 – 8:30 pm Registration **
7:00 – 9:00 pm Speaker

Friday, Date

7:00 – 9:00 am Registration **
8:00 – 9:00 am Breakfast **
8:30 – 9:00 am Credentialing – House of Delegates (HOD) **
9:15 – Noon House of Delegates (HOD) **
12:15 – 1:30 pm President's Luncheon **
2:00 – 2:30 pm Credentialing – HOD p.m. session **
2:45 – 5:30 pm House of Delegates **

Saturday, Date

7:00 – 9:00 am Registration **
8:00 – 9:00 am Breakfast **
8:00 – 10:00 am MSMA Past Presidents' Breakfast **
8:00 – 5:00 am Vendor Booths
8:00 – 10:00 am Speaker
10:15 – 12:15 pm Speaker
12:30 – 2:00 pm Awards Luncheon **
2:30 – 4:30 pm Speaker
4:45 – 5:15 pm Chapter Member Forum/Snacks
5:15 Raffle
6:30 – 7:00 pm Cocktail Reception and Cash Bar
7:00 – 9:00 pm Installation Banquet **
9:00 pm Reception/Entertainment

Sunday, Date

8:30 – Noon Board of Directors Meeting **
9:00 – 11:00 am Speaker

Items with ** must be on agenda, times are variable

PROCEDURE FOR EXHIBITORS, SPONSORS, AND DONORS

- 1. Contact hotel regarding available exhibit space, number of tables, plugs, length of tables, table coverings, and signs.
- 2. Outside exhibitors are to be assessed a fee of \$100 for a 6-8-foot table, which includes lunch for one person (additional lunch tickets may be purchased); exhibitors who are also MSMA members are to be assessed a fee of \$50, which does not include lunch. Do not turn anyone away. Be creative in negotiations. (i.e. if the exhibit fee is too high, offer placing an ad in the program at a reduced cost as part of the exhibit fee).
- 3. Solicit potential exhibitors/sponsors via phone, personal contact, and/or written communication to participate in the conference/convention.
 - A. Exhibitors are those individuals or organizations who display products and/or information to conference/convention attendees.
 - B. Sponsors are those individuals or organizations who provide financial support for an event such as a meal function, candidates' night, refreshments, mailing, etc.
- 4. Utilize the Chamber of Commerce in the area as an excellent resource.
 - A. Help locate potential exhibitors/sponsors/donations
 - B. Assist with publicizing/advertising the event
 - C. Local attractions
- 5. Mail exhibit information to potential exhibitors/sponsors (*see Sample Letter*). Include an Exhibitor and Sponsor Agreement (*see Exhibitor and Sponsor Agreement*) to be signed and returned.
- 6. Make contact with the hotel to inform them of final number of exhibit tables, plugs, etc.
- 7. Day of event have committee member(s) assigned to greet exhibitors as they arrive and make sure exhibit accommodations have been met. Make sure refreshments are made available (water, coffee, tea, etc.).
- 8. Maintain log (*see computer template*) to keep track of communication with sponsors, donations, exhibits, etc.
- 9. Give thank you letters and mention upcoming conferences/conventions. Forward contact information for those who provided it to the Conference Liaison for future contact.



SAMPLE LETTER

The Michigan Society of Medical Assistants will be sponsoring the 2011 Fall Conference, October 28-30, 2011. This conference will be held at the Crowne Plaza Hotel located at 5700 28th St SE, Grand Rapids, MI 49546.

Attending the education seminar will be approximately 75 clinical and administrative medical assistants, employed in single and multi-physician offices representing numerous specialties, as well as various institutions. Objectives of the Michigan Society of Medical Assistants are to promote continuous education and credentialing, and to improve professional relations and service.

As an education organization, we would like to appeal to your company to help us defray the cost of our upcoming conference. We are currently seeking representatives to purchase exhibit booths at the conference, provide donations to be used toward the cost of guest speakers, and purchase advertising space in our programs. Costs are as follow:

- Exhibit table, outside vendor (1 lunch provided): \$100
- Exhibit table, MSMA vendor (no lunch): \$50
- Full page advertisement: \$75
- Half page advertisement: \$50
- Quarter page advertisement: \$25
- Business card advertisement: \$15

Exhibit hours are from 8:00 a.m. until 4:00 p.m.

If you are unable to purchase exhibit space or advertise in the conference program, but wish to furnish “goodies,” which will be handed out with the registration packets, or donate a raffle item, we will gratefully accept them. All contributions will be appreciated and acknowledged in our printed program.

For your convenience in completing your paperwork, our tax ID number is 23-7370249. As space is limited, I look forward to hearing from you in the near future. For further information, please contact Christa Smith, CMA (AAMA) at (269) 275-1429.

Sincerely,

Christa Smith, CMA (AAMA)
Conference Chair

MSMA 2011 FALL CONFERENCE
Crowne Plaza Hotel, Grand Rapids, MI October 28-30, 2011

EXHIBITOR/SPONSOR AGREEMENT

Company Name _____

Contact Person _____

Address _____

City _____ Zip _____

Telephone Number _____

Type of Product/Service _____

Table Registration

Outside exhibitors – includes one lunch ticket

One 6ft table: \$100

Two tables: \$150 (save \$50)

MSMA exhibitors – no meals included

One 6ft table: \$50

Advertising

Full page: \$75

Half page: \$50

Quarter page: \$25

Business card: \$15

TOTAL ENCLOSED

Exhibit area will be available at 7:00 a.m. for set up.

Please make checks payable to MSMA Conferences.

Please return completed form and check to:

Kathy Stuit, CMA-A, (AAMA)
417 E Melody
Portage, MI 49002
(269) 323-9477 or kathstuit@aol.com

Exhibitor/Sponsor/Donor Database Template – Double-click anywhere within the interactive template to enter data. Scroll within template to complete all fields.

(Insert Chapter Name) Hosting (Insert Conference/Convention Name) Sponsors, Exhibits, Donations Database and Followup (Insert Name of Chair and Co-Chair)										
Company Name/Address	Phone #	Fax #	Email	Contact Person	Type of Business	F/up Activity	Booth/Amnt	Ad/Amnt	Donation/Amnt	Sponsor/Amnt
Ex: XYZ Uniforms, 987 Main St, Grand Rapids, MI 49509	(123) 456-7890	(123) 456-7899	me@xyzuniforms.com	Susie Salesperson	Medical uniforms	Email	\$ 100.00	\$ -	\$ -	\$ -

(Insert Name of Chapter) OF MEDICAL ASSISTANTS

(insert date)

Dear Chapter President,

As you are aware, the (insert chapter name) Chapter of Medical Assistants will be hosting the (insert name of conference/convention), (insert date), (insert year) at the (insert conference/convention location) in (insert city, state).

Our committee is hard at work planning what we think will be an enjoyable and rewarding experience for all our Michigan members. As you might expect, not only does it take time, teamwork, and commitment but also money. Therefore, we are appealing to all chapters to make a monetary contribution to help defray expenses in the amount of (insert amount).

If this amount poses a hardship to your chapter, please consider donating door prizes for the conference. Contributions will remain anonymous and any financial help would be welcome.

If you have someone running for state office, don't forget to purchase advertising space in our conference printed program. What a great way to promote your candidacy for office!

- Full page ad: \$75
- Half page ad: \$50
- Quarter page ad: \$25
- Business card ad: \$15

Checks can be made payable to (insert whom check should be made payable to) and forwarded to the name and address below. Thank you in advance for your support. We're looking forward to seeing all of you at the (insert name of conference/convention).

Sincerely yours,

(insert name, credentials)
Convention Chair

Mail to: (insert name)
(insert street address)
(insert city, state, zip)
(insert phone number **and** email address)



**STANDARD PROCEDURE FORMAT
EDUCATION COMMITTEE**

PURPOSE: To select speakers for continuing education topics that are relevant to the practice of medical assisting and of interest to the membership.

PROCEDURE:

- 1. Research resources for speaker/program suggestions
 - A. Contact MSMA Education Committee.
 - B. Local community colleges and universities, especially those with a medical assisting program, an allied health division, department of medicine and/or medical research or continuing education divisions.
 - C. Statewide, regional or national offices for organizations related to medical care (e.g., Blue Cross Blue Shield, American Cancer Society, State Health Department, OSHA, Michigan State Medical Society, ECDON, or TIPDON, Michigan Biller's Association, State Centers for Disease Control).
 - D. MSMA members who plan on attending that would be interested in speaking.
 - E. Refer to the previous conference/convention evaluation sheets
 - F. Contact MSMA Education Chair to confirm selected topics

- 2. Plan program content and outline with appropriate CEU value and submit to conference/convention chair

- 3. Obtain written confirmation of presentations from each presenter that outlines the presenters' objectives and topical outline of presentation or syllabus

- 4. Request written resume or CV information from each speaker
 - A. Utilize information provided to make speaker introductions

- 5. Submit topic(s) and speakers' CV for AAMA approval at least 30 days prior to event
 - A. Follow-up with AAMA for receipt and approval of each program planner's profile and program of information submission

- 6. Request from AAMA Attendance Record for AAMA CEUs forms
 - A. Designate someone to be responsible for passing out and collection of attendance forms
 - B. Submit all attendance forms to AAMA via fax within 30 days

- 7. Coordinates educational speakers' needs
 - A. Designate committee members to be responsible for introduction of speakers

**STANDARD PROCEDURES FORMAT
REGISTRATION COMMITTEE**

PURPOSE: To facilitate the handling of convention registration, finances, setting up and staffing the registration table each day of the conference/convention.

PROCEDURE:

- 1. Using the prepared template (*see computer template*) maintain a list of all registrants and guests.
- 2. Establish a date with committee members to prepare registration packet for each participant to include:
 - A. Name badge
 - B. Program
 - C. Meal ticket(s), if used
 - D. Conference evaluation (*see computer template*)
 - E. Conference check sheet for CEUs
 - F. Any other handouts
- 3. Provide accurate meal count to be given to hotel and Conference/Convention Chair according to timeline established and set forth in the contract.
- 4. Coordinate scheduling of workers to coincide with registration times published in program.
- 5. Using the prepared templates (*see computer template*) maintain a system for accounting purposes and to establish an audit trail (i.e. identify the registrant's name, check #, amount received, etc.).
 - A. Work closely with Finance Chair for accounting purposes (Registration and Finance may be the same person)
 - B. Track monies received and deposited in the bank bi-weekly
 - C. Record all deposits and checks written on the Financial Documents (*see computer template*)
 - D. Final Financial Report to be completed (see flash drive) showing all income and expenses. This report, along with the Final Convention Report (prepared by the Chair), to be given to the BOD at the next board meeting.
 - E. **ALL deposit slips, bank statements, and other financial transactions must be kept and turned over to the MSMA Treasurer post conference/convention.**

CONFERENCE REGISTRATION TEMPLATE INSTRUCTIONS

Registration Template: will be used to count the attendees by membership status, package/Saturday only, meals, and the money received. Formulas have already been inserted in line 154 and do not need to be adjusted.

1. Enter information from the registration form using the following headings: Last Name, First Name, Credential, Nickname, Chapter.
2. Indicate membership status by placing the number one (1) in the appropriate column: Member (Mem), Non-member (non), Student (Student), MSMA Past President (PP).
3. Indicate type of registration by placing the number one (1) in the appropriate column: Package (Pkg), Saturday Only (Sat)
4. Indicate meals registered for by placing the number one (1) in the appropriate column – even if purchasing package. (The spreadsheet will tally the total on line 154). If an additional meal ticket is purchased, indicate the appropriate number instead of using the number one (1).
5. Indicate the amount of the check in the column labeled Amt. Use whole numbers and no dollar signs (do not include cents).
6. Indicate the name on the check in the column labeled Check.
7. Indicate the check number in the column labeled #.
8. When the check is deposited in the bank, indicate that date in the column labeled Deposited.

Checkbook Template: to be used just like a checkbook register. Formulas have been entered in column H and rows 48-53. Do NOT delete these formulas. These formulas will be carried over to the Balance Sheet.

1. Change conference name and year in cells A1 and I1.
2. Indicate total amount of deposits in column B.
3. Using columns I through N, indicate source of deposit.
4. Indicate check information in columns labeled Check (check number), Amount (amount of check), Payee (who check was written to), and Reason (what was being paid).
5. Using columns O through T, indicate reason for expense.
6. When reconciling with the bank statement, place the date the item cleared the bank in column labeled Cleared Bank.

Deposit Template: to be used in the event the bank/credit union does not have deposit slips. You may not have a need for this template.

1. Change information in cells A1, A2, and A3.
2. List name on check in column labeled Name.
3. List check number in column labeled Check #.
4. List amount of check in column labeled Amount.
5. Formulas have been entered at the end of the Amount column and will total automatically.

Balance Sheet: used to present a summary of the finances for the conference; can be used for both the Board of Directors report and the annual report of the House of Delegates.

1. Change information in cell A1.
2. Do NOT change any other information as it is all formula-driven and will import information from the checkbook.

Balance Sheet Template – Double-click anywhere within the interactive template to enter data. Scroll within template to complete all fields.

MSMA (name and year of conference) Finances				
<u>Income</u>				
	Advance from MSMA		-	
	Exhibitors		-	
	Advertisements		-	
	Sponsors		-	
	Registration		-	
	CEUs		-	
		Subtotal		\$ -
<u>Expenses</u>				
	Hotel		-	
	Postage		-	
	Supplies		-	
	Honoraria		-	
	CEU		-	
	Return to MSMA		-	
		Subtotal		-
Income Less Expenses				\$ -

STANDARD PROCEDURE FORMAT
PUBLICITY, PROMOTION, AND ENTERTAINMENT COMMITTEE

PURPOSE: To assist in facilitation and handling of convention/conference publicity and promotion/advertisement/entertainment needs based on activities planned.

PROCEDURE STEPS:

- 1. Act as a resource person in convention/conference publicity and promotion
- 2. Prepare articles/notices promoting conference/convention/seminar
- 3. Arrange for publications in
 - A. State and chapter publications (MSMA website, social media, membership email blasts, etc.)
 - B. Local newspapers
 - C. Fliers/brochures for distribution to offices, hospitals, etc. Basic information should be well organized and include:
 - 1) Program title
 - 2) Date, time, and location
 - 3) Cost and registration information
 - 4) Refund and registration policy
 - 5) Name, mailing address, phone number, and e-mail address of contact person
 - 6) Note if program is approved or pending approval of AAMA CEUs
 - 7) Information about parking, meals, or directions to the facility
 - 8) Hotel registration information if overnight stay is necessary
- 4. Act as a resource person in convention/conference entertainment
 - A. Entertainment during meal function (installation banquet or other functions)
 - B. Prepare table decorations for meal functions
 - C. Welcoming event/hospitality function (if planned)
 - D. Entertainment/refreshments

**STANDARD PROCEDURE FORMAT
PROTOCOL COMMITTEE**

PURPOSE: To facilitate the handling of appropriate protocols and to maintain established protocol guidelines.

PROCEDURE STEPS:

- 1. To assist conference/convention chair in attainment of proper protocols for guests and speakers seating arrangements during conference/convention program of special activities or events
 - A. General protocol guidelines (*see Conference and Convention Procedure Manual*)
 - B. President's Banquet seating (*see Conference and Convention Procedure Manual*)
 - C. Luncheon seating (*see Conference and Convention Procedure Manual*)
 - D. Reserved tables and seating (*see Conference and Convention Procedure Manual*)

- 2. To assist conference/convention chair in development of an agenda during conference/convention special activities or events
 - A. Luncheon Agenda (*see Conference and Convention Procedure Manual*)
 - B. President's Banquet Agenda (*see Conference and Convention Procedure Manual*)
 - C. Awards Luncheon Agenda (*see Conference and Convention Procedure Manual*)

- 3. To assist conference/convention chair in attainment of established protocols and guidelines as appropriate or as needed
 - A. Arrange for special courtesies to VIPs as identified by President, Conference Liaison Committee, Conference/Convention Chair
 - B. Arrange for VIP travel from/to airport as designated by President, Conference Liaison Committee, Conference/Convention Chair

PROTOCOL COMMITTEE

General Protocol Guidelines:

1. The presiding officer sits at the center of the head table, so as to be seen and heard by all in the room. The presiding officer may go to a lectern placed at one side or the other to preside at a program following the function (luncheon, dinner, etc.), but should never be required to walk back and forth from the table to the lectern. This can be both awkward and distracting.
2. The presiding table can be placed at different angles, but the presiding officer must always be easily seen and heard.
3. The first honor position is to the right of the presiding officer. The top-ranking individual in the association sits in the first honor position unless a high-ranking elected government official or a distinguished guest speaker is present. In this case, in respect to the office or position of the guest speaker, the person would yield the first honor position and sit in the second position of honor.
4. Seating for other honored guests should start with the individual who has the longest length of service.
5. Spouses of head table dignitaries are seated at a reserved honor table in the audience and introduced from there.
6. Past state presidents should be seated at a reserved table near the head table for ease of introductions.
7. One person, traditionally a past state president, should be responsible to organize the lineup of those sitting at the head table for each function. This person may also be responsible for preparing name place cards for the head table. Usually, those seated at the head table are asked to meet at a specific time (usually 15-20 minutes prior to the event) in a specific place to receive their instructions.

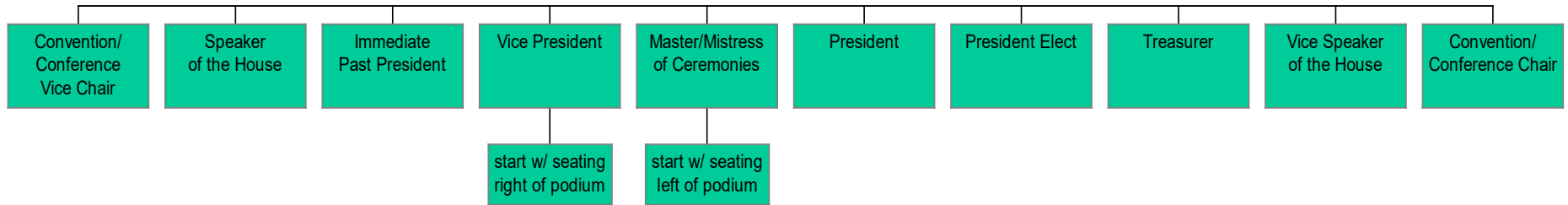
SAMPLE PRESIDENT'S BANQUET SEATING
(Or other function where a head table is being used)

Convention/seminar Vice-Chair
Honored guest (if any)
Speaker of the House
Honored guest (if any)
Immediate Past President
Honored guest (if any)
Vice President
(Right of Podium)
Master of Ceremonies
(Left of Podium)
President
Honored guest (if any)
President Elect
Honored guest (if any)
Secretary
Honored guest (if any)
Treasurer
Honored guest (if any)
Vice Speaker of the House
Convention/seminar Chair

RESERVED TABLES

Past State Presidents
Honored guests (family, friends of those being installed)
Hosting chapter

**Sample Luncheon Chart
or
Sample President's Banquet Seating Chart**



Podium may be placed in the middle of the Vice President and the Master/Mistress of Ceremonies
Podium also may be place at the corner of the Convention/Conference Chair

Note: Honored guests can be seated between officers or as desired

SAMPLE PRESIDENT'S BANQUET AGENDA

Participants: Incoming and outgoing officers of the society

Set up: Head table (see suggested seating guidelines)
Podium
Microphone
Separate table for installation

MASTER OF CEREMONIES
(if this is not the Chair or Vice Chair)

Welcoming remarks

Introduction of Head table

(Chair may ask someone to do this
or the President may ask someone)

Inspiration

Lunch/Dinner

MASTER OF CEREMONIES
(if this is not the Chair or Vice Chair)

Introduction of honored dignitaries who are requested
to address banquet attendees

Brief remarks by honored dignitaries

Introduction of Installing Officer (to perform
installation of officers)

Outgoing President

Outgoing President gives his/her address

Presentation of gavel to new President

Incoming President

Incoming President gives his/her address

Incoming President

Adjourns the convention

MASTER OF CEREMONIES

Final remarks

SAMPLE AWARDS LUNCHEON AGENDA

Participants: Awards Chair, President, honored guest(s), and others who need to present awards

Set-up: Head table (see suggested seating for President's Banquet)
Side table for placing awards, certificates
Microphone
Podium

President: Welcome

Introduction of Head Table

Introduction of honored guests to make remarks

Introduction of Awards Chair for presentation of awards

President: Final remarks

Dismissal

PRESIDENT'S BANQUET COMMITTEE

- Responsible for:** Arranging decorations and entertainment for President's Banquet and cocktail reception. **All decorations are optional.**
- Reports to:** Convention Chair. Committee members report to Committee Chair.
- Volunteers needed:** Number depends upon how much set-up is required and amount of decorations used.
- Financial guidelines:** Decorations and entertainment are the financial responsibility of the hosting chapter; expenses are deducted from the receipts received for the convention.
- Duties:**
- Locate light entertainment (optional). Do not sign contracts unless the Convention/Conference Chair has reviewed them.
 - Consult with Chair to determine number of decorations (many hotels will provide candle/centerpieces for the dinner).
 - Have flowers or decorations in place at least 1 hour prior to start of event.
 - Collect all decorations or flowers following the event or arrange other method of disposition (such as a raffle)
 - Greet and escort entertainers when they arrive. Brief them on staging.
 - May need to station volunteers at doors to collect meal tickets (if they are used) from guests or attendees.

HOSPITALITY COMMITTEE

- Responsible for:** Welcoming registrants
Providing general information about the area
Extending special courtesies to VIPs identified by the Chair
- Reports to:** Conference/Conventions Chair
- Volunteers needed:** Sufficient number to complete tasks assigned and serve as hostesses
- Financial guidelines:** Any expenses of this committee are deducted from receipts of the conference/convention
- Duties:** Have someone available to answer questions
- If a party is planned, have a theme, light refreshments, and a clear understanding of how long the event will continue. Stop while everyone is still having fun
- Plan functions that allow registrants to mingle. This allows them to meet new members and renew friendships with ones they have already met.
- If possible, solicit sponsors for the event to offset costs. If this is not possible, a small fee to cover costs may be necessary. Be sure to include this in the registration costs
- Have members with outgoing personalities preside as hostesses so that shy members, new members, or someone who is attending by themselves, can be introduced to each other and made to feel welcome
- Make sure that everyone is participating
- Let it be FUN. Don't be afraid to be silly and have lots of laughs