

# NSMA ANNUAL CONFERENCE GUIDELINES

## GENERAL INFORMATION

The purpose of the Annual Conference Committee is to develop and organize the NSMA annual meeting of the membership which includes continuing education sessions, the General Assembly, pre- and post-conference NSMA BOD meetings, meal functions, social activities, and exhibits.

The NSMA Annual Conference is an assembly of NSMA members, students, and nonmember medical assistants. The annual General Assembly serves as a single deliberative body acting in the name of the entire NSMA membership.

The Conference Chair is appointed three years before the Conference at the Post-Conference Board Meeting. The Chair should begin to organize the conference under the guidance of the NSMA Board of Directors eighteen months before the conference. Speakers and programs should be scheduled at least one year in advance.

The current NSMA President should choose a Conference Chair who demonstrates leadership qualities, can meet deadlines, is organized, and can manage committee work. Candidates should demonstrate professional and effective verbal and written communication skills. The Chair selects a Vice Chair, if desired, along with the appropriate conference subcommittees and chairs.

The NSMA Annual Conference is usually held in the spring of each year. The conference is held in different areas of Nebraska on a rotational basis to offer educational opportunities to as many medical assistants throughout the State as possible. The Conference Chair should be aware of observed holidays when selecting meeting dates in advance.

The entire conference committee should carefully study the correspondence and conference reports of the preceding years. Past experiences and suggestions will be very valuable in helping to avoid mistakes when planning future events. Some of the protocols for the annual conference remain constant; however, there is always flexibility to allow for innovations desired by the host area. The Conference Chair should request BOD approval before proceeding with any new projects or untested ideas related to the conference planning and agenda.

Social functions may include a welcome party, awards ceremony, installation luncheon or banquet, and a farewell meal. If hosting a Welcome Party, the event provides an evening of fun, food, and fellowship for all. On the last day of the conference, a preview event advertising the next conference may be presented by the upcoming location to spark interest in next year's conference.

The NSMA Archive Chair is the official photographer for the conference and will be on-site to take pictures of events for the NSMA history books and the NSMA website.

The NSMA Membership Chair may want to organize a special session for first-time attendees and students attending the conference. This should be coordinated with the Conference Chair to

arrange a meeting room and time on the agenda. The NSMA Membership Chair would recruit key NSMA leaders to attend. Offer refreshments and a short introduction from NSMA leaders. Answer questions and mingle.

The awards presentation ceremony is organized by the NSMA Awards Chair in consultation with the Conference Chair. The ceremony recognizes individuals for exceptional efforts by presenting NSMA Special Recognition Certificates. The winner of the CMA of the Year Award is announced at this event. Acknowledgments are also given to the winner of the Membership Recruitment Contest and the NSMA Annual Conference Grant Award recipient. If indicated, the NSMA scholarship winners are introduced.

The installation of officers will take place at either the luncheon or the evening dinner/banquet. This affair honors all NSMA Past Presidents in attendance and special guests. The occasion marks the official “passing of the gavel” to the incoming President and the official installation of newly elected officers. This event should be light and relaxing to provide a break in the flow of continuing education.

Optional sessions that may be organized during the annual conference include special leadership sessions, an NSMA Past President Society meeting, a medical assisting educator round table discussion, and a special motivational or informational session hosted by the AAMA BOT Representative.

All conference committees will follow the guidelines of the annual conference budget which is developed by the NSMA Budget & Finance Chair and approved two years in advance by the NSMA BOD.

Include recruiting the student volunteer population whenever possible to encourage active involvement within this membership group. Ideas for participation include the distribution of speaker hand-outs, assisting at the registration table, conference hostesses, introduction of speakers, etc.

It is best to advise conference attendees in advance of the meeting dress code. Since the conference offers the opportunity to network with other CMAs (AAMA) and represents to the outside world an association of professionals, the recommended attire for the conference is business casual.

The Chair shall seek approval from the NSMA BOD for the hotel site, the program agenda and the registration fee. The complete conference program and registration fees are presented for approval and discussion one year in advance.

Following the close of the annual General Assembly, the Conference Chair should arrange with the Speaker a time to address the conference attendees with a brief synopsis of the General Assembly proceedings which includes an introduction of the newly elected board members, bylaws amendments approved, significant new business, etc.

All conference committee members should prepare a final written report submitted within 30 (thirty) days of the event to the Conference Chair. The Conference Chair will combine all reports and present the final NSMA Annual Conference Committee report including financial statements to the BOD.

## **COURTESY NSMA CONFERENCE INVITATIONS**

The following courtesy invitations are at the expense of the NSMA Annual Conference Committee:

### Annual Conference Installation Ceremony Tickets

- President to be installed (2)
- Medical Advisory Board (2 each)
- Past State Presidents
- Life Members
- Honorary Members

### Annual Conference Registration Fee

- Conference Chair
- AAMA BOT Representative
- Medical Advisory Board Members
- Current NSMA President
- Life Members
- Qualifying Student Advisory Board Members

## **NSMA CONFERENCE CHAIR & (optional) VICE-CHAIR**

The following duties may be shared between the Conference Chair and the Vice Chair as they work together as a team. The Vice-Chair should be kept informed of all conference activities. Both should monitor the progress of conference subcommittees.

As soon as the President appoints an Annual Conference Chair (and Vice Chair) it is expected and in the best interest of that member(s) to start attending all NSMA BOD meetings.

The Annual Conference Chair should determine which subcommittees are needed and select a chair for each. The individual chairs then select their committee members based on need. The Conference Chair and the subcommittee chairs should communicate and meet regularly to correlate planning and ensure completion of assignments. The Conference Chair regularly reports progress directly to the NSMA BOD.

Chair works with the NSMA President in planning for the conference agenda and with the Speaker in planning for the General Assembly meeting. The NSMA President presides over all

sessions of the conference except the General Assembly. The Speaker presides over the General Assembly. The newly installed President presides at the farewell function.

The Annual Conference Chair should furnish a list to both the NSMA President and the Speaker that mentions any guests who will need special introductions – i.e. Past Presidents, members outside of Nebraska, special guests, etc.

If a theme, slogan, or colors are chosen for the conference, present information to the NSMA BOD no later than the Fall Board meeting the fall prior to conference. The theme and color selections are generally carried out throughout the program and with the Decorations Committee.

The Annual Conference Chair shall prepare a welcome message for the Conference Program and submit it to the Program & Folder Chair by the established due date.

The chair should appoint members to present opening reflections and greetings before meal functions. Appointments should be confirmed in writing. Provide names to the Program Chair for printing in the program.

The Annual Conference Chair must approve the final copy of the registration form (prepared by the Registration Chair) and educational session information (prepared by the Education Chair) which will both be posted on the NSMA Website. The Annual Conference Chair will prepare a hotel reservation form to be distributed with the registration sheet and posted on the NSMA Website.

If NSMA has formally requested attendance by an AAMA BOT representative, the Annual Conference Chair should contact the assigned individual to inquire about their travel itinerary. Designate a member to be responsible for the AAMA Rep (travel from/to airport, hotel, meals, etc.). Notify the Rep of meeting dates, times, and locations and send an official conference program when available. Make reservations for the AAMA representative's hotel room and arrange transportation to and from the conference site. AAMA will underwrite the cost of the Representative's round-trip transportation. NSMA is responsible for all lodging, meals, and any other hospitality. A courtesy conference registration is given to the AAMA Representative.

Contact a local color guard (i.e. – girl scouts, boy scouts, high school drill team, etc.) for the presentation of the flag for the opening session of the General Assembly. A small gift such as a certificate to a restaurant may be given to each participant as a token of appreciation.

Assist the NSMA Awards Chair with arranging for the presentation of the Certified Medical Assistant of the Year Award and NSMA Special Recognition Certificates during the awards ceremony. Recipients of the NSMA Annual Conference Grant Award, the NSMA Membership Recruitment Contest, and the NSMA Student Scholarship award may also be announced.

Assist the Membership Chair in arranging a presentation honoring the new CMAs (AAMA) and recertified CMAs (AAMA) from the previous year at the awards ceremony.

If requested, work with the NSMA Membership Chair to arrange for a First Timers and/or Students breakout session. This should include NSMA officers who will mingle and introduce themselves.

The Annual Conference Chair should welcome attendees at the first educational session and make appropriate introductions including the Conference Education Chair and the AAMA BOT Representative.

All committee chairs should know where the Annual Conference Chair can always be reached during the conference. The Chair should be available on-site to supervise all activities. The chair should oversee the room set up for all conference activities and food functions.

After the conference, thank you notes need to be written and sent to the Mayor, Governor, and hotel staff by the Annual Conference Chair. The respective subcommittee chairs will write thank you notes to the speakers, exhibitors, door prizes, and all contributors.

It is the responsibility of the Conference Chair to prepare a final conference report to include an overall summary of the planning, and sponsored events along with a summary of program evaluations (if done), financial report, and attendance report. This report will be submitted to the BOD at the summer (August) meeting and then printed in next year's general assembly packet as a year-end BOD member report.

## **NSMA CONFERENCE SITE ARRANGEMENTS**

The Annual Conference Chair visits potential sites and negotiates a contract based on meeting room facilities, attendance capacity, location, and time frame. The hotel choices should be conveniently located, large enough to meet all conference space, room requirements and offer the most for the least cost.

The Annual Conference Chair should discuss and obtain price quotes for all fees connected with the hotel such as blocked hotel rooms, parking, meals, decorations, use of meeting rooms, rental of audio-visual equipment, applicable taxes, etc.

The Chair shall secure a proposed contract from the selected hotel with dates, the number of blocked hotel guest rooms with room rates, and miscellaneous expenses three years in advance. An approximate number of people expected to attend will be needed and can be projected based on previous attendance numbers. Following NSMA BOD approval, the Annual Conference Chair will sign the contract for it to be valid.

The Annual Conference Chair is responsible for selecting and finalizing the menu selections and negotiating the prices for meal functions including breaks. Establish a deadline with the hotel staff for submitting the final head count for both meals and meeting room attendance.

Make specific room arrangements for all events – meals, registration areas, educational sessions, exhibits, ways and means table, a secured lock-up storage area, a display area for the NSMA history books, and handouts regarding certification and membership. Schedule rooms for the pre

and post-conference NSMA BOD meetings as well as the onsite spring BOD meeting (March). The NSMA President chooses the date of the spring meeting, and the Annual Conference Chair arranges for a tour of the hotel facility at that time for the BOD members.

Details to discuss with the hotel include start and stop times, decorations available through the hotel and what is allowed to be brought in (i.e. food items), room locations and set up, deadlines for hotel reservations to receive the conference rate, podium, AV equipment, availability of the United States and Nebraska flags, availability of water and glasses in all meeting rooms, and chair/table arrangements.

Discuss the possibility of receiving complimentary lodging rooms. Assignments of nontransferable complimentary hotel lodging rooms, when available, are given to the AAMA Representative and the Annual Conference Chair respectively. If the Annual Conference Chair has a complimentary suite, it may be made available for certain small group conference functions with the Chair's permission.

When the final program agenda is available, the hotel contact person should be given a copy to confirm arrangements for meetings and events. The Annual Conference Chair will meet with the hotel representative periodically and just before the start of the conference to review and make final preparations. Make provisions for reviewing and paying the final hotel bill including appropriate tips for hotel staff.

## **NSMA MEETING ROOM SET-UP**

Pre-conference and post-conference NSMA BOD meetings – it is best to have the tables and chairs set up in an open U- shape. Allow seating at the table for 30 people plus a few extra chairs for guests (approximately 15).

The conference registration table is usually set up outside the session rooms. The table should be large enough to hold folders, ribbons, and check-in sheets. Usually, two 6–8-foot tables are adequate. Provide a communication bulletin board for messages near the registration area. For meal seating, it is preferred to have round tables set up in a room separate from the day's educational sessions. Specific break times are usually scheduled somewhere around 10:00 AM and 3:00 PM on Saturdays. Beverages should be available for both the morning and afternoon breaks. A small snack may also be served at these times if funding is available.

During the installation/awards luncheon/banquet, there should be a head table elevated on risers with a microphone and podium. Place cards may be used for the head tables. The Annual Conference Chair should coordinate seating arrangements with the presiding officer. Prearrange the installation ceremony props and appropriate setup with the NSMA Vice President. Designate a table as reserved seating for NSMA Past Presidents and current Chapter President. Allow enough reserved seating space for guests of the President and the Medical Advisory Board members plus their guest(s). The Student Advisory Board members may also be invited to sit at a reserved table. The Hospitality Chair may arrange optional light entertainment during or after the luncheon or banquet if requested.

Discuss with the AAMA BOT Representative in advance and coordinate time and room requirements for any presentation or discussion she will lead.

Educators' workshop – space for this session will be arranged only if contacted by the NSMA Public Relations Chair and will be organized according to the requests submitted.

The NSMA Membership Chair will need to arrange a room and time on the agenda for the First Timers and Students breakout sessions.

The Speaker is responsible for the General Assembly room set up including all place cards for the head table and meeting volunteers. The Annual Conference Chair is responsible for getting the set-up diagram to the hotel before the conference.

If space allows, it is usually more comfortable for educational sessions to be set up in classroom style which provides table-top space for writing. Ice water and glasses should be available either on the tables or at a water station in the back of the room. Provide podium, microphone, and any other audiovisual equipment requested by speakers.

A display table for ways and means may be placed in the educational session rooms, with the exhibitors or in a separate lockable room.

The display tables for NSMA/AAMA membership information, certification materials, and the NSMA history books should be located where easily viewed by attendees.

Allow ample space for the exhibitors and fundraisers near the session rooms keeping in mind that the area should be readily accessible to the registrants. The conference schedule should allow adequate time for viewing exhibits by all attendees between sessions.

## **GENERAL DUTIES NSMA CONFERENCE SUBCOMMITTEES**

Suggested annual conference subcommittees and their duties are listed below. Some of the subcommittees can be omitted or merged depending on the needs and available manpower of the hosting area. The Annual Conference Chair may also choose to delegate additional responsibilities to chair positions.

Subcommittee chairs shall communicate directly with the Annual Conference Chair regularly. Report activities and submit expenses as needed.

Chairs should recruit as many subcommittee members as needed to function efficiently. Chairs shall delegate duties to committee members but remain in close contact to monitor progress. To facilitate communication, submit the list of names of all committee members and their contact information to the Annual Conference Chair.

Each subcommittee chair should prepare an outline of duties and a work timeline for subcommittee members to follow.

Send copies of all correspondence to the Annual Conference Chair. Answer all correspondence and inquiries promptly.

Within 30 days after the close of the annual conference, all Chairs should submit a written report to the Annual Conference Chair detailing committee activities from initial preparations to completion of assignments. This report should include a financial statement itemizing expenses and income sources.

The chairs of all subcommittees should be available on-site during the annual conference to oversee activities and volunteers.

## **NSMA CONFERENCE CORRESPONDENCE**

Send letters of invitation along with registration information to the State President of the states bordering Nebraska – (South Dakota, Minnesota, Iowa, Missouri, Kansas, and Colorado). Names and addresses can be obtained from the AAMA. Mail at least four weeks before the NSMA conference registration and hotel reservation deadline dates.

Two to three months before the conference, contact should be made with the hosting city's Mayor's office. Inform the Mayor of the upcoming NSMA Annual Conference and invite him/her to make a brief welcome speech. In addition, ask the mayor for a letter of welcome to be included in the program. A copy of the previous year's conference program could be mailed to the mayor to give an idea of the type of activities occurring at the conference. The mayor's letter must be submitted to the Program and Folder Chair before the print date deadline. Following the conference, a thank you letter from the Annual Conference Chair will be mailed to the mayor in appreciation of his/her participation.

The Correspondence Chair will extend a special invitation to the following for the installation ceremony. Courtesy meal tickets are offered to the following at conference expense:

- President to be installed (2)
- Medical Advisory Board Members (2 each)
- Past State Presidents (2 each)
- Life Members (2 each)
- Honorary Members (2 each)

RSVPs should be directed back to the Corresponding Secretary so arrangements can be made to seat all NSMA Past Presidents at a reserved table. Report names back to the conference chair so that special introductions can be made of each honored guest by the presiding officer indicating the year attendees served as President.

A special courtesy invitation with conference registration (at annual conference expense) should be sent to the following:

- Conference Chair
- Conference Vice-Chair
- AAMA BOT Representative
- Medical Advisory Board Members

- Current NSMA President
- NSMA Life Members
- Eligible Student Advisory Board Members

## **NSMA CONFERENCE DECORATIONS (Optional)**

This Chair oversees the room decorations and organizes events with the conference theme, slogan, and colors. The Annual Conference Chair will decide if table decorations are needed for meal functions based on funds and manpower availability. It is appropriate to select decorations that can be sold or used as door prizes, and this would be coordinated with the Prizes/Donation Chair. If a floral centerpiece is used at the head table, this should be given to the newly installed NSMA President when the conference ends.

## **NSMA CONFERENCE PRIZES/DONATION**

It is at the discretion of the conference chair to utilize this committee if the manpower is available. If developed, collect as many door prizes as possible, preferably valued at \$5.00 or more. In addition to door prizes, solicit financial support for educational programs, speakers, and/or events.

If registration gifts/favors are obtained, they should be easily accessible for giveaways at the registration area. Arrange with the Registration Chair the amount of space needed for items. Arrange for storage and security of prizes with the hotel. The Chair may choose to assemble individual “goodie bags” for every registrant which are distributed when the attendee checks in at the registration table.

The chair should organize a team to contact potential contributors by letter, email, telephone or in person. Cash contributions can be accepted instead of a gift and will be used to help offset general conference expenses. A careful record should be kept of all contributors’ names and addresses and what they gave. A final list of all contributor names should be given to the Program Chair (copy to the Annual Conference Chair) for publication in the program. An addendum list may be necessary for items received after the program print deadline.

Suggestions for potential contributors to contact include hospitals, medical clinics, local pharmacies, pharmaceutical companies, insurance companies, florists, uniform shops, craft shops, bookstores, department retail stores, discount chain stores, restaurants, fast food places, electronic stores, medical supply firms, etc. A review of the list of contributors from past years is helpful.

This Chair is responsible for devising a system for awarding door prizes, arranging for volunteers to draw for winners, wrapping the prizes, bringing them to the hotel, and arranging secure storage. If gift certificates are received from local companies, they should be marked and awarded to local members. Designate special times during the conference to draw for door prizes when most attendees are expected to be present. This needs to be coordinated with the Annual Conference Chair and Education Chair.

The Chair shall send thank you notes to all contributors with a copy to the Annual Conference Chair. It seems more efficient to write and mail notes at the close of the conference.

## **NSMA CONFERENCE EDUCATION**

This committee is responsible for the educational sessions of the annual conference. The decision concerning topics and speakers should be a joint decision of the Education Chair and the Annual Conference Chair based on the CEU needs of the membership. Review the past two years of conference agendas to ensure topics are not repeated. Strive to offer a minimum of 10-12 hours of AAMA-approved CEUs annually. The Chair shall select presentations for the specific time slots as directed by the Registration Chair and Annual Conference Chair.

The Education Chair should provide the form that is included in the conference registration packet for registrants to document attendance at CEU sessions. As a reminder, this form should state that to receive credit for the program, the attendee must be present during at least 90% of the session. This means that no more than six (6) minutes can be missed for each hour of continuing education.

When contacting possible speakers, include the topic requested, date, time, and location of the meeting. Choose speakers for their knowledge in each field. After the speaker agrees to present, request curriculum vitae and any information needed to get the session approved for CEUs. Send a confirmation letter to the speaker. Include driving and parking directions and on-site contact telephone numbers. All conversations with the speakers should be verified in writing.

Because of NSMA budgetary restrictions, make all attempts to obtain speakers who will donate their time or for whom sponsorship is available. If a special speaker is selected and an honorarium or travel expenses are requested, approval must be received from the NSMA BOD. Attempt to find sponsors to defray the charges that would be incurred. A suggestion can be made to the speaker to donate fees back to the organization for a personal tax deduction.

Find out what type of audiovisual equipment is needed for each presentation and arrange with the hotel to provide it. A microphone and podium should be available for all speakers. If possible, perform a visual and sound check with the hotel staff before the first program to ensure all attendees will be able to hear and see the speaker. Assist with audio-visual equipment on site and know who to contact if help is needed.

Submit appropriate application forms to AAMA to obtain CEU credit for educational sessions. This should occur early enough so when the conference notice is advertised it can be announced that programs are approved for AAMA CEU credit and in what category. The educational sessions are a strong incentive to members and nonmembers to attend the annual State conference. This advance notice is required by many attendees to submit to employers for approval and reimbursement.

Prepare a summary of each educational session to include the title, CEU content area, and a brief description of the program. Submit this for posting on the NSMA Website with the conference registration forms. This detailed information could be the deciding point for someone deciding to

attend. Provide a copy to the Publicity Chair who will mail/fax along with the registration form to area clinics.

Select a member to greet, escort, and introduce each speaker. Appointed volunteers should be given a brief statement with biographical information to be used for the introduction. The Annual Conference Chair or NSMA President introduces speakers if no other arrangements have been made.

The Chair is responsible for arranging volunteers to distribute speaker handouts. It is an excellent idea to have students assist with this project. The speaker may ask NSMA to make copies of the handouts to be distributed and absorb the cost. This is a reasonable request and an expense deducted from the conference education committee funds.

The Chair may assign two monitors to each continuing education session with a large audience to ensure attendance protocols are met. Monitors must arrive early and be able to attend the entire session they are monitoring. Students may assist but should not be assigned sole responsibility for monitoring a session. The CEU sign-up sheet or the program attendance number should be circulated or announced at the end of the session to ensure members' full participation. Attendees should be reminded that AAMA requires attendance at 90% of any program to earn the CEU credit. This means a member may miss a maximum of six (6) minutes out of every sixty (60) minutes from a program.

It is the responsibility of this Chair to send thank you letters immediately following the conference to all speakers (copy to the Annual Conference Chair). Any complimentary remarks received regarding the educational sessions may be relayed to the speaker in the letter.

## **NSMA CONFERENCE EXHIBITS**

This committee selects healthcare-related vendors to rent table space and set up exhibits. If space allows, general interest or "FUN" raising vendors may be offered a display area - i.e. jewelry, candles, Avon, MaryKay, Tupperware, etc. Arrange for these general interest exhibitors to either donate a percentage of their profits to NSMA or have a set fee per table. The number of exhibits depends on the available space. Consideration should be given to companies that represent a variety of interests. Use the previous years' conference programs for ideas.

Information needs to be collected from the hotel before contacting exhibitors. Check to see how much space is available, if the hotel furnishes the display tables, and table drapes, how many electrical outlets are available, and if 220 wiring is included.

Coordinate the exhibit viewing time with the Annual Conference Chair to ensure adequate time for all to visit the displays. The table rental fee is decided on by this chair and the Annual Conference Chair and may include one free meal ticket per exhibit. Determine a table rental fee considering any fees NSMA may need to reimburse the facility.

Send letters to potential exhibitors well in advance of the company's annual budget planning. When soliciting exhibitors, provide information about the organization, anticipated number of attendees, table size, and exhibit fee, and give exact dates and hours the exhibits are to be set up, displayed, and taken down. Ask if there are any special requests, i.e. electrical outlets, corner tables, etc.

When soliciting exhibitors, if a company declines your invitation, ask for consideration of a cash donation that will help offset general conference expenses.

If an AAMA BOT Representative will be attending, check for their availability and willingness to manage a booth in the exhibit area to display AAMA information and answer questions. The NSMA membership/certification display table may be set up in this same area if desired.

The complete list of exhibitors must be given to the Program and Folder Chair (copy to the Annual Conference Chair) before the print date deadline for inclusion in the conference program.

The chair should arrive early on opening day to welcome exhibitors and assist with setup. Provide a packet of information including a program, name badge, meal ticket, etc. to each exhibitor.

At the close of the conference, the Exhibits Chair is responsible for writing thank you letters to the exhibitors and sending a copy to the Annual Conference Chair.

### **NSMA CONFERENCE FINANCE (Acting Treasurer)**

This Chair is responsible for the financial activity of the conference. The NSMA conference checking account is located at First Interstate Bank. There are bank branches located in most major cities in Nebraska. The account will have the Annual Conference Finance Chair as the primary signature and the NSMA Treasurer will be the secondary signature (in case of emergencies). The conference checkbook will be transferred to the new Annual Conference Finance Chair with a \$500.00 balance (to be used by the hosting area as an advance loan) at the summer (August) BOD meeting.

The NSMA Annual Conference budget is pre-approved by the BOD two years in advance. This budget should be followed as closely as reasonably possible. Covered expenses generally include postage, printing, name badges, speaker expenses, entertainment, decorations, meals/refreshments, and equipment rental. Income includes registration fees, donations, exhibit rental space, fundraising projects.

The Conference Finance Chair will write a check for the conference profits and present it to the NSMA Treasurer along with the conference financial final report at the summer (August) BOD meeting (leaving the \$500.00 balance).

All monies received must be acknowledged on a ledger form and all monies spent are to be accounted for by an invoice and a completed NSMA General Expense Voucher form. All outstanding bills should be presented directly to the Annual Conference Chair for approval and then given to the Conference Finance Chair for payment.

Registration monies will be forwarded from the Registration Chair to the Finance Chair for a deposit as they are received.

The expenses of the Speaker and Vice Speaker are to be paid out of the NSMA general operating fund.

The cost of the installation ceremony and the NSMA President's reception is an expense of the conference fund.

Courtesy meal tickets are allotted for the installation/awards ceremony for the President (2 tickets), Medical Advisory Board members (2 tickets each) and Past State Presidents (2 tickets each for those not registered at the conference), Life members (two tickets each) and Honorary members (2 tickets each). The cost of these courtesy meals is an expense of the conference. Nontransferable courtesy registrations are available to Life members, the AAMA BOT Representative, Conference Chair and Vice Chair, the current NSMA President, eligible Student Advisory Board members, and the Medical Advisory Board members. Each courtesy registrant should be asked to submit a completed registration form. Courtesy registrations are considered a conference expense.

All money received from fundraising and donations belongs to NSMA.

It is the responsibility of the Finance Chair to prepare a post-conference financial statement and present it to the Annual Conference Chair. This report should match all line items as provided on the approved conference budget. A draft should be available on the last day of the conference for the post-conference NSMA BOD meeting. The final figures will be distributed with the final conference report at the summer (August) NSMA BOD meeting along with the check for all conference profits.

## **NSMA CONFERENCE FUNDRAISING PROJECT / WAYS AND MEAN**

This committee is responsible for special fundraising activities to help offset general conference expenses. Whatever initiatives are undertaken, they should have a professional appearance so that NSMA reflects a positive image to the public.

If an on-site display area is needed, notify the Annual Conference Chair to arrange for space and a secure locked storage area if required. Arrange for adequate volunteers to promote and sell fundraising items.

The expenses and the amount of profit from fundraising and ways and means should be detailed and kept separate from the other monies collected for the conference. Funds should be itemized individually in the conference financial report.

Raffle tickets have been successfully sold in the past and prizes can include cash or higher quality items, i.e. electronics.

If food items are considered as a fundraiser, verify with the Annual Conference Chair that it will not infringe on hotel policy.

## **NSMA CONFERENCE HOSPITALITY/WELCOME PARTY (SOCIAL)**

This committee is responsible for greeting registrants and offering general assistance to make them feel welcome. A welcome party is optional and typically only arranged if hosting a three-day conference due to the added conference expense and agenda time constraints. If a welcome party or special gathering is organized, work closely with the Decorations Chair for decoration planning, entertainment, and/or the meal function.

Extend special courtesies to VIPs as identified by the Annual Conference Chair. Nominal mementos given to speakers co-arranged with the Education Chair are a thoughtful gesture. The Chair may request that all members of the host area wear special badges and serve as conference hostesses. It is recommended that at least one hostess be assigned to greet registrants at the registration table to extend a friendly introduction and welcome. Upon request hostess may recommend local restaurants, shopping areas and entertainment spots away from the hotel. It's a good idea to have local area maps available.

The Chair may organize off-site social activities and private tours to local attractions. Any expenses associated with this would be separate from the conference registration fee.

This chair should assist the Annual Conference Chair in arranging sponsors for break beverages and snacks. The Chair may contact medical supply firms, insurance companies, area clinics and hospitals, medical assisting programs, or other companies interested in sponsorship.

Special "games" may be developed for first timers and/or students with appropriate prizes for the winners. Fun games to help members socialize and mingle may also be introduced.

Recognition must be given to all contributors to the conference program. Furnish the names of contributors to the Program Chair (copy to the Annual Conference Chair) before the print date deadline.

Thank You letters are to be sent to all contributors after the conference with a copy going to the Annual Conference Chair.

## **NSMA CONFERENCE PROGRAM and FOLDER**

This committee will be responsible for preparing the program and obtaining folders for conference materials. The cost of materials and printing may be subsidized by selling ads and patron listings.

Contact may be made with insurance companies, medical billing services, community colleges, or other agencies to solicit financial assistance for the cost of folders, printing, and program expenses.

Use sample programs from previous years for ideas. The conference program cover should state the name of the organization, the location of the meeting, month-date-year, which conference number it is, and the theme (if used). In addition, the program should include the NSMA President's welcome letter, the mayors' welcome, the Annual Conference Chair welcome letter, and a list of conference subcommittee chairs. The program should indicate when and where each event will be held. Include a roster of all exhibitors and a patron listing. Optional information includes a list of NSMA Past Presidents, the current NSMA officers, and committee chairs. The program should make it clear that all attendees are welcome to attend the General Assembly and NSMA BOD meetings.

The registration folder should contain the attendees' name badge. This is the identification tag that will admit attendees to CEU sessions, meal functions, the General Assembly, and all conference events.

Select the program format and color by coordinating with the conference theme and colors.

The target date for program and folder completion should be 2-3 weeks before the conference. After the folders and programs are completed, arrange a time with the Registration Chair to assemble items to be included in the folders.

## **NSMA CONFERENCE PUBLICITY (PROMOTIONS)**

This committee is responsible for all advertising and news coverage regarding the conference. The chair or designee may personally represent NSMA in press, radio, or television coverage. The Chair should write an article or present a news release including such things as the name of the organization, conference theme, date, time, place, educational topics, and speaker names. This article/release may be distributed to the NSMA Public Relations Chair so they can notify the community newspapers, radio, television stations, community hospitals, and physician offices throughout the state.

The chair is encouraged to design a promotional flier that can be distributed to offices, clinics, pharmacies, hospitals, etc. Send by mail or fax an introductory letter along with the conference registration form and hotel information to physician offices, hospitals, clinics, and schools in Nebraska and surrounding areas (especially offices not represented in the NSMA membership).

A report may be submitted to newspapers across Nebraska immediately following the conference naming new NSMA officers and announcing the Certified Medical Assistant of the Year recipient. This would be an opportune time to advertise the location of the next year's conference.

The Chair of this committee works with the NSMA Archive Chair who is the official NSMA photographer and the NSMA Website Chair for establishing photo requirements. Group photos

should be taken of NSMA officers and the NSMA Past Presidents for posting on the NSMA Website. The time for group photos should be announced in advance so all members attending are included. All photo expenses are charged to the NSMA Archive Chair.

## **NSMA CONFERENCE REGISTRATION/RESERVATIONS**

This chair should prepare the registration form for distribution and posting on the NSMA Website. The editor will set the deadline date. The Education Chair will provide speaker names and prepare the session information. The form should include a statement that gives notice “educational sessions are subject to change”. The Annual Conference Chair will format the hotel reservation information for print and website posting.

It is suggested that several registration categories be established with appropriate pricing. These include NSMA members, nonmembers, students, full or daily registrants, and complimentary. Review previous years’ forms for ideas and layout.

The registration form should include the name of the organization, date, time, place, registration fee, the deadline for early registration (the penalty for late registration), and deadline for booking a hotel room at a special block rate. There should be space on the form to place the name, address, phone number, email address, and credentials. Format should include boxes to check for member or nonmember, which meal functions registrant will attend, new or recertified CMA (AAMA) or if this is the first conference for the attendee. The refund policy and the CEU registration policy should be printed on the form.

When sending out the registration form, attach the schedule of educational sessions with content description, on-site registration hours, and other pertinent information.

The registration fee for the conference is determined by the Annual Conference Chair and conference subcommittee chairs with NSMA BOD approval after reviewing the meal prices, breaks, and anticipated miscellaneous expenses. The registration fee for nonmembers shall (at a minimum) include the cost of a bi-level AAMA membership plus the registration fee that is set for members. It is suggested that the student registration fee be limited to the cost of meals rounded up to the next dollar. The CEU fees for both members and nonmembers are included in the cost of the registration.

Registration is open to all CMAs (AAMA), members and nonmembers, non-credentialed medical assistants, educators, students, nurses, RMA’s, employers, and other allied health professionals both inside and outside of Nebraska.

All first timers should be mailed a copy of the NSMA document “Your First Annual NSMA Conference Experience”. This will help the newcomer have a better understanding of what to expect at the conference and answer a lot of questions. Extra copies should be available at the conference registration table.

Courtesy registrations are given to the Annual Conference Chair, Annual Conference Vice-Chair, AAMA BOT Representative, Medical Advisory Board members, current NSMA President, Life Members, and eligible Student Advisory Board members. Registration forms still need to be completed and forwarded to the Chair of this committee. The Correspondence Chair will mail the courtesy invitations and registration materials.

Courtesy meal tickets to the Conference Installation/Awards Ceremony are extended to the President to be installed (2), Medical Advisory Board Members (2 each), Past State Presidents (2 each), Life Members (2 each), and Honorary Members (2 each). The Correspondence Chair will mail out letters with courtesy invitations and report responses to the Conference Chair.

The Chair shall forward a list of any nonmembers registered for the conference to the NSMA Membership Chair for recruitment follow-up. Include names of any attendees who join during the conference so they can be mailed new member packets.

The Registration Chair receives all registrations. The completed registration form is kept by this committee. The check is forwarded to the Conference Finance Chair after verifying the amount on the registration form and the amount enclosed match. Prepare an income ledger sheet to indicate a breakdown of what the money was received for i.e. full or partial registration, extra meal tickets, etc.

Advise the Annual Conference Chair of the total number of registrants for each meal at the end of the registration deadline.

A report may be given by the Chair at designated times during the conference including the General Assembly stating the total number of registrants including a breakdown of how many full and partial registrants and how many members, nonmembers, and students.

This committee assembles the information included in the registration packet with assistance from the Program and Folder Chair. Suggested items to include in the folder are a copy of the official conference program, name badge, notepad, pen, AAMA CEU attendance verification form, speaker handouts, conference evaluation form, hotel map, and general information regarding the hosting city and maps (unless distributed at the registration table).

Ribbons designating officers, students, first time attendees, new CMA (AAMA), AAMA Trustees and years of membership, etc. should be available for easy pick up on the registration table. The Registration Chair is responsible for keeping enough ribbons in stock and placing an order to replenish ribbons when needed. Submit bill to the NSMA Treasurer for payment out of the NSMA operating budget miscellaneous fund.

The Chair may choose to differentiate between students and first-timers, and/or identify full registrants vs. partial registrants by developing a color code system on the name badge or by the use of stickers.

The Chair is responsible for setting up the registration desk and obtaining volunteer coverage during designated times. A chart of volunteer names with the date and times of service should be available. Registration instructions and a brief orientation should be conducted by the Chair on site before the first registration time. A bulletin board may be set up at the registration table to be used to post messages and announcements.

Volunteers should be prepared for onsite registrations knowing this process takes a little longer. Have extra folders already made up and blank name tags.

Registration times should be available approximately two hours before the first session on opening day, one hour before each session on the following days, and any other appropriate times. Registration times should be printed in the program.

The registration area should have enough table space and room to avoid confusion. Usually two (2) six (6) foot tables are needed for the registration area and extra space for any giveaway favors/prizes provided by the Prizes/Donations Chair. Display descriptive literature received from the city's Convention and Visitors Bureau including general information on the hosting city, community maps, places of worship, physicians, dentists, shopping areas, and locations of special interest.

Plan – have scissors, scotch tape, stapler, extra pens, and pencils at the registration desk. Pack up any leftover materials on the final day of the conference.

Contact may be made with the Chamber of Commerce or Convention and Visitors Bureau for help with the registration. If they are providing the name tags and badges, supply them with a list of attendees with appropriate credentials, member, nonmember, or student status, and city where they live. Allow enough time for completion so they can be included in the registrant's folder.

Phone registrations are discouraged unless there isn't enough time to receive via mail. Any outstanding fees must be collected at the time of on-site registration. Refund requests for emergencies must be brought before the NSMA BOD.

### **AAMA TRUSTEE (NATIONAL BOT REPRESENTATIVE)**

Each year following the AAMA annual conference, the AAMA executive office will send a representative bureau request form to the NSMA President. If Nebraska chooses to request a representative from the AAMA BOT to attend the next NSMA annual conference it should be completed and returned as instructed. Once processed, AAMA will notify the President of the representative appointed for the upcoming conference.

AAMA will underwrite the cost of the Representative's round-trip transportation. NSMA is responsible for lodging, meals, the conference registration fee, and any other hospitality.

The purpose of the AAMA Representatives Bureau is to enhance communications between the National Association and State Society members. The representative will be prepared to present information on organizational subject matters such as membership and member relations.

Optional round table discussions, open forums or panel discussions give Society members an opportunity for dialogue with the representative. Set aside specific times during the conference for the AAMA BOT Representative to speak to the members either on a one-to-one basis, small focus group, or by addressing the entire conference. Obtain approval from the AAMA Representative before scheduling an activity that requires her presence.

The AAMA BOT Representative is also available to install officers if requested. These arrangements should be made in advance. The rep will be offered an exhibit area to display organizational material where she may also answer member questions.

The AAMA BOT Representative should be invited to attend the pre- and post-conference NSMA BOD meetings so that any questions State leaders have can be addressed. Provide the representative with an agenda and copies of reports to be discussed.

The Annual Conference Chair is to contact the AAMA BOT Representative to inquire about his/her travel itinerary. If requested, make hotel reservations for the representative and arrange ground transportation to/from the hotel. Confirm the date, time, and location of the meeting as well as the topic and length for any presentations in writing.

Assign an NSMA member representative to act as a host to greet the AAMA BOT Representative before sessions start to escort them to the meeting rooms and make appropriate introductions. Remember that the AAMA Representative should always be given a position of honor at all events. Common sense rules in all circumstances to make for a comfortable and dignified stay for the AAMA Representative.