

## Planning a Conference

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If you have been courageous (or foolish?) enough to agree to organize a medical meeting then this article may make the job easier. It is not designed to cover every conceivable aspect of planning, but it should provide enough in the way of helpful hints to save you hours of frustrating time and enable you to plan most of your meeting on a do-it-yourself basis. We feel that far too much medical education is drifting into the hands of regulators under the guise of continuing medical education. This has generated a tremendous increase in the amount of paper work a physician/planner must complete in order for a course to qualify for CME credits. We are firmly convinced that anyone with a tremendous desire for hard work and an I.Q. greater than 100, plus an aggressive, competent secretary can do as well as anyone else.

This review will not keep you from making small mistakes, but it should help you avoid massive foul-ups that can significantly affect the outcome of a meeting. This outline is based on a chronological approach to the organization of a medical meeting and all dates should be considered approximations. Staying within the guideline should prevent as much last minute scrambling as possible.

### 24 to 12 Months—Sites and Dates

Pick a city based on the time of year you and your group want to meet considering the location of past meetings, and the geographic distribution of the participants. Investigate several good hotels and find out what each will offer your group. You should already have a rough idea for the number of persons that you hope will attend since most hotels are willing to bargain with costs of meeting space based on the number of participants. Most organizers make their initial mistakes at this step of planning—they imagine hundreds or thousands of eager

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physicians from all over the country signing up for their course. This is the exception rather than the rule. It is better to scale down your early estimates by a third to half. A few minutes on the telephone with anyone who has had prior experience organizing meetings will confirm the too-optimistic approach of most beginners.

Find out with whom you are dealing at each hotel and meet with them personally. Telephone negotiations can save time, but you should have at least one preliminary meeting with the hotel convention manager.

1. Reserve a block of rooms which the hotel will agree to hold. Be certain what penalties you will incur for not filling this block of rooms. Also inquire about hospitality rooms which are usually included without charge depending upon the size of the block of rooms you have reserved. Discuss size, price, and availability of meeting rooms and make arrangements for a registration area as close to the meeting rooms as possible. Be certain you specify the type of seating you desire—*theater or library*. This will influence the size of the room needed. Ask for all arrangements to be put into writing.
2. Discuss meals, transportation, and general activities with the hotel manager and make sure that you take good notes. Much of this information will be useful in writing up your program announcements.
3. Contact the Chamber of Commerce or the Convention Center and ask for their help and advice with registration, maps, and sightseeing. They can often suggest some tours that are not generally open to

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the public—local industries, private showings at public museums, etc.

4. Make sure that you understand all of your and the hotel's obligations. There are often unexpected costs for coffee and soft drinks that are served at conference intermissions. Many of the larger cities have unionized projectionists with rules requiring substantial extra charges for only a few minutes of overtime.
5. If you really want to make your meeting as pleasant as possible, try to do something a bit different with meals and intermission snacks. For example, a buffet breakfast of fresh fruit, rolls, and omelets is a very pleasant way to help each of your participants begin the day and it assures substantial attendance for early morning conferences.
6. Set up a master billing plan for all of your speakers' in-hotel expenses. Establish who is authorized to bill to the account (speakers, officers of the society, secretaries) and when it will be paid (last day of conference). Also define exactly what can be charged to this account, excluding car rentals, bar bills, long distance telephone calls, etc.

## 12 Months

### 1. Draw Up the Program

Decide on the subjects that the conference should cover with emphasis on those areas that are of most interest to your audience. Use some out-of-town stars, as well as lesser-known but excellent speakers. Be sure that you include some local faculty, because they will be well-known in the area of your conference and are also significantly less expensive. It is much more appropriate to invite each speaker personally and confirm your arrangements with a letter than to make the initial approach through the mail. Establish specifically what your group is willing to pay in terms of honorarium and expenses. Do not say that your society will "provide all your expenses," unless you really mean it since you may find your out-of-town guests flying first class and renting an expensive car when they arrive. Try to have your speakers organized around a few themes rather than attempt to organize a session without anything to tie it together. Make sure that you use your out-of-town guests more than once since they represent one of the more substantial expenses of organizing a meeting. If you finish your meeting with the weakest speakers and least interesting subjects, expect a small crowd! Lecture outlines and references are very helpful for the audience. Establish a due date for these from your speakers.

### 2. Draw Up a Budget

Base your expected attendance on the results of your group's past meetings or local experiences. It is much better to think small than too large, since many of your expenses will be fixed. It is customary to charge each participant between ten and fifteen dollars per CME credit hour. If your organization has a treasury, make sure the local organizer has some up-front money and has the authority to spend it. This money must be available for mailing lists, programs, deposits on meeting sites, etc, and will be spent well before you receive any admission fees. A sample budget should include headings for speakers, hotel, program with mailing, and incidentals:

**Speakers.** Honoraria, plane fare, room, and meals. Out-of-town faculty should be paid a substantial honorarium (\$200 minimum) defined in advance. Do not embarrass your guests by forcing them to ask about money.

**Hotels.** Rooms for speakers, meals for participants (if covered in the registration fee), a projectionist's fee, and any in-hotel entertainment that you think is appropriate (such as coffee breaks, cocktail parties, dinner-dances, etc).

**Program with Mailing.** You will need about 50 to 100 programs mailed per registrant, plus a charge for postage, labeling, and sorting.

**Incidentals.** CME fees to register you with your national, state, or county organization. Plan for a substantial telephone bill; you will need extra secretarial help and it is probably appropriate to give small gifts to the speakers.

Many programs barely break even and some actually lose money. You should count on this possibility in your planning and make sure that you have some sort of financial backer, such as your group's treasury. If you do not want to take this risk, then you will have to go through the local CME group and run the rest of the program through them.

### 3. Apply for CME Credit if You Are Putting on the Program Yourself

Credit can be given by local organizations, hospitals, medical schools, societies, and residency programs who have previously received approval from national (AMA, special groups) or state organizations. They may be willing to cooperate for no charge, although their fees may be substantial. You can also receive accreditation through state and national societies but the red tape involved in this can take several months, so make sure that you write or call well in advance. Be certain to find out exactly

TABLE 1. Meeting Calendar for Listings

Archives of Dermatology 535 N. Dearborn Street Chicago, IL 60610	Journal of Cutaneous Pathology MUNKSGAARD 35 Norre Sogade, DK-1370 Copenhagen K DENMARK
Cutis 666 Fifth Avenue New York, NY 10019	Journal of Investigative Dermatology 428 East Preston Street Baltimore, MD 21202
JAMA 535 N. Dearborn Street Chicago, IL 60610	Journal of the American Academy of Dermatology Westline Industrial Drive St. Louis, MO 63141
Journal of Dermatology and Allergy Suite 2080 1603 Orrington Avenue Evanston, IL 60201	The Guide to Allergy and Dermatology Meetings c/o P.R.R., Inc. 800 Second Avenue New York, NY 10017
Skin and Allergy News 919 Third Avenue New York, NY 10022	Owen Laboratories Division of Alcon Laboratories Dallas, TX 75243
The Journal of Dermatologic Surgery and Oncology 475 Park Avenue South New York, NY 10016	Dermatology Times 95 Madison Avenue New York, NY 10016
Dermatology News 275 Madison Avenue New York, NY 10016	Calendar Secretary International Medical News Group 12230 Wilkins Avenue Rockville, MD 20852
International Journal of Dermatology 1601 Walnut Street, #724 Philadelphia, PA 19102	

State and County Medical Societies, both generalized and specialty. Many drug firms publish meeting calendars.

what criteria you must fulfill in order to be approved. Many organizations want only a copy of the program, but others insist on pre- and post-testing, as well as post-session evaluation forms which must be returned to the sponsor or organization.

The American Academy of Dermatology through its Council on Educational Affairs may approve educational programs for up to three years. Contact their office in Evanston, Illinois 60201, 1567 Maple Street, (312) 869-3954. Currently the American Academy of Dermatology offers two principle types of CME approval—1, and 1AE (Academy equivalent). 1AE requires on-site monitoring by an officer or committee member of the American Academy of Dermatology, strict program guidelines directed towards theme oriented meetings and written post-conference evaluations. Category 1 credit is much easier to obtain with far less stringent requirement, although approval for either category takes months plus a small application fee.

## 12 to 6 Months

### 1. Start Publicizing Your Meeting

Write to national groups and professional society magazines asking to be included in their meet-

ing calendars (Table 1). It may be appropriate to pay for some advertisements in professional journals, but this may be very expensive. Write to other professional groups that share common interests with you and to organizers of other meetings that appeal to similar types of physicians asking them to announce your meeting at their sessions. Contact hospitals, medical schools, and professional interest groups in your general area and ask them to post announcements. You may wish to print some posters for this job.

### 2. Find a Printer and Design the Program

In most cities there is much competition in the printing trade, so be sure to ask for several estimates. The cost of the program will depend upon its size, the quality of paper, the layout, amount of art work, and color. It is not likely that you will need a graphic artist to help you with the layouts since most printers will do this for you at no extra charge, or give it a personal touch and do it yourself. Remember that the text and its layout will be one of the primary attractions of the program, so please try to use some imagination. Dull colors with no attempt at design or attractive layout will

probably attract fewer physicians' attention than something that is done in bolder colors with a bit of art work on the cover. In the text of the program you should define what your meeting will achieve and what groups should be interested. If there are any prerequisites, such as a basic knowledge of dermatology, etc, make sure that they are stated. Mention your speakers' qualifications, and try to make the titles of their talks as interesting as possible. If it is appropriate, you should stress the social events and whether it would be appropriate for those attending to bring their families and friends. If the site you have chosen for a meeting is an interesting one, then say so.

As a general example, your program should have a title page followed by general information and then the specific program with dates and times. There should be sections on where and how to register and a blank form for doing so. The program should also contain the name and address of a local organization and if appropriate, some instructions on how to get to the hotel. Do not forget to leave one side as a mailing surface!

In addition to printing a program, you may also want to print posters which can be used in hospitals and medical schools.

### 3. Plan to Mail the Program by Contacting

#### A. Label supplier

#### B. Mailing service firms, since you will need both labels and some way to have them affixed to the program.

Label supplier. This will require a label service house: Clark O'Neill, 1 Broad Street, Fairview, NJ 07022, telephone (201) 945-3400; or Business Mailers, 640 LaSalle Street, Chicago, IL 60610, telephone (312) 782-4126. Specialty Societies such as the American Academy of Dermatology, 1567 Maple Street, Evanston, IL 60201, telephone (312) 689-3954 and the American Academy of Pediatrics P.O. Box 1034; 1801 Hinman Avenue, Evanston, IL 60204. Label fees will be less if you are a non-profit organization and if you are a member of the American Medical Association. Pharmaceutical firms may also have extensive mailing lists which they may give to you without charge. Label firms allow you to direct your mailing to special groups (type of practice, specialty) and special areas (specific states, geographic areas). Do not spend much on Florida mailings for a January meeting in Buffalo! Plan to pay about \$300 per five thousand labels.

Mailing services. A local mailing firm will:

- (1) Attach labels onto programs.

- (2) Sort, bundle and tie programs by zip code.

- (3) Deliver to the post office.

In dealing with a mailing firm, you should appreciate that there are multiple types of labels which can be used depending primarily on the type of machine that will attach the labels to the program. Contact a local mailing service (usually listed in the yellow pages under "mailing") to find out what type of machine they have before you order your labels. Mailing services will usually charge you less if your labels are arranged according to zip codes which can be done through arrangement with the labeling service. The Canadian mailing system will not honor U.S. non-profit postage, so be sure to take that into account when planning your budget. Mailing lists for Canada may be obtained through Southan Direct Marketing Service, 1408 Birchmont, Scarborough, Ontario, Canada M1T 2E3, telephone (416) 445-6641. Bulk mailings can be done from the United States to Canada provided that each piece of mail contains the regular 20 cent postage and not a non-profit rate. Non-profit permits can be obtained from the U.S. Post Office after they certify your eligibility (they need a certificate of incorporation). Or you may be able to use your CME sponsor's non-profit postage number if you have made such an affiliation and are willing to reimburse them.

### 6 to 4 Months

Mail the program, sit back and wait.

### 3 to 1 Months

Confirm your arrangement for audio-visual equipment with either the projectionist provided by the hotel or one of your own choosing. Most charge between \$100 and \$150 per day and will frequently provide all their own equipment (projectors, screen, microphones, and recording equipment). Try and check the projectionist's references since nothing is worse than having your chosen person fall asleep on the job or forget to focus each and every slide. You should probably try and arrange to have the meeting proceedings taped since this will cost you very little and you will always have something for the record.

Order your registration materials: folders, evaluation forms, name tags (clip-on or pin-on are best especially for meetings lasting more than one day), CME credit applications, maps, and note paper. The convention bureau, hotel manager, or a business supply house will help gather this material.

TABLE 2. Registration Master Information Sheet\*

Registrant's Name	Code	Date Registration Received	Amount Paid	Check #/ Date	Activities (No. Attending)		Specialty	Hotel Reservation Card Sent	Activity Letter	CME Credit	
					Dinner	Tour				Hrs	Date Sent

\* Column explanations: (1) Code: S = speaker; C = corporate representative; P = participant; R = resident physician. Each registrant may have more than one code (ie, S/P). (2) Date registration received. (3) Amount paid. (4) Check number and date. (5) Activities: number attending; record in pencil as there are usually many changes. (6) Specialty or field of interest, ie, pediatricians, dermatologists. (7) Hotel reservation card sent. (8) Activity letter, form letter sent to those whose registration is incomplete. Record date mailed and when returned, add the appropriate numbers to Column 5, mark Column 8 received, and discard letter. (9) Continuing medical education certificates sent.

Assemble your course book composed of note paper, case protocols, speakers outlines, and references. It is best to remind your invited speakers well in advance of the due date!

From this point on you must keep accurate records and probably will need a skilled assistant/secretary to keep track of registration details. Up-to-date counts of attendance at academic and social events will save both money, embarrassment, and frustration. Use ledger paper to keep track of fees, room reservations, social function, travel arrangements, etc (Table 2).

### 1 Month to 1 Week—Renew Commitments and Arrangements

1. Meet with and review your arrangements with your local people. Meet and shake hands with the chef, listening to his suggestions for local specialties. Try to avoid run-of-the-mill dinners by emphasizing seasonal fruits, local wines, ethnic dishes, etc. Check with each speaker and make sure he realizes his commitment to the program (number, time, place, length and subject of presentation). You will be amazed at how many competent speakers forget prior promises!

Review in-hotel arrangements for seating, lighting, placement of podium and lectern, and positioning of the screen. *Nothing is worse than a low screen in a long room.* Visit the room which will be used for the meeting and place a chair in the front and in the back. The lower margin of the screen should be above a point projected from the head of the guest in the back row, past the head of the guest in the front row, and on to the front wall. Anything projected lower than this will not be visible by those in the back half of the room. Make sure that you are familiar with the location and function of the thermostat and light switches.

2. Arrange and review your registration equipment (folder, programs, evaluation forms for CME

credits, handouts, name tags, note paper, description of social events, maps, etc). If a large part of your group is coming from out of town, prepare a small brochure describing the favorite restaurants, sightseeing highlights, easy methods of transportation, as well as a short list of "beware's"—passports, dry states, police quirks, blue laws, etc.

### Meeting Day or Preregistration the Evening Before

Set up the registration desk and if possible have the local host in attendance at all times. There certainly should be someone there who is familiar with the local scene as well as the requirements and arrangements for the meeting. You will not be able to imagine the variety of unusual questions! Check daily with the chef or hotel manager on the day's meals, hospitality suites, and condition of the meeting room. Many hotels can provide you with a VIP pin which will get you past the people at the front desk and into the real workings of the place.

When the meeting is actually in progress, sit near the back and close to a door since you will probably have to leave frequently to help guests who have fainted, visitors who are lost, and speakers who are nervous.

Meet each speaker before and after his presentation and check to make sure that hotel and travel arrangements are suitable. It is most appropriate to present the speaker's honorarium immediately following his presentation. If at all possible, provide reimbursement for airfare, room, and board right on the spot. Nothing makes me (JER) more upset than to submit expenses and wait two to three months before reimbursement. If you have a master account, tell the speaker how to sign for everything (and what is not covered).

Check with your projectionist at the beginning and end of each day and let him/her know what he is doing right or wrong. If you have a reasonable working relationship with this person, his/her performance should

TABLE 3. Registration Master Information Sheet\*—  
Guest Lecturers Only

Arrival Date and Time	Departure Date and Time	Hotel Room Type	Reservation Made and Confirmed

\* Column explanations: (1 and 2) Arrival and departure dates and times—responsible for hotel arrangements. Confirm one week prior to meeting. (3) Hotel room type. (4) Reservation made and confirmed.

improve throughout the meeting based on your comments.

At the beginning of each day's session, remind the participants to fill out their evaluation forms and tell them where the forms should be deposited.

Have the moderators for each day's session be sure to repeat any questions that are asked from the audience since *this is the most common complaint of participants at meetings.*

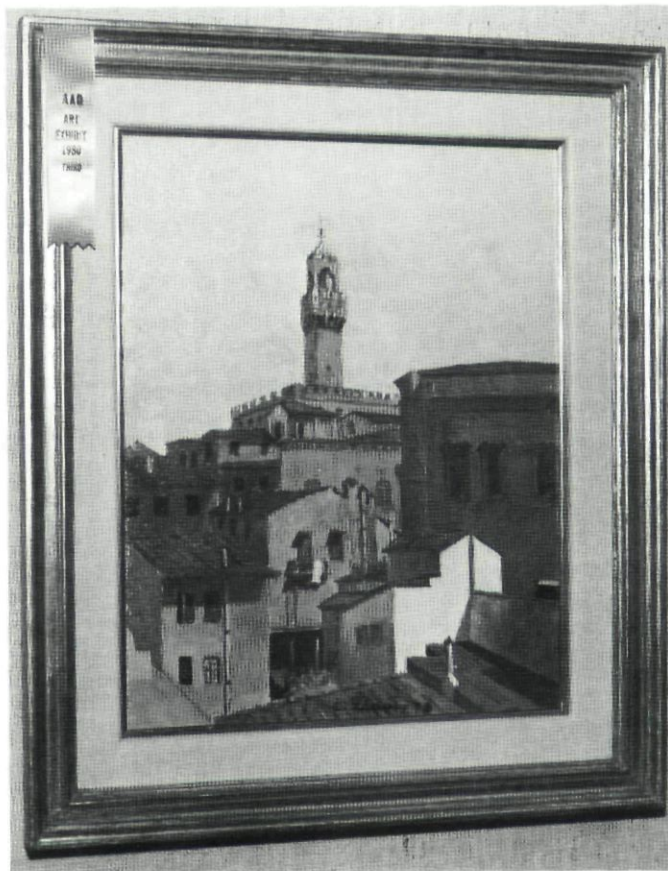
### Final Day of the Meeting

Meet with the hotel staff/management to pay all master charges and at this time give compliments and complaints to all individuals, preferably in person. Congratulate the projectionist, chef, and hotel manager in person if appropriate. Make sure that all speakers have collected their gear, especially from the projectionist and that you have the evaluation forms. If any of your meeting or executive committee are still in town, have an informal discussion of the positives and negatives of the meeting and propose changes for next year. Problems will not seem as pertinent if discussed two to three months after they have occurred.

You may need to provide proof of attendance for CME credits—keep tabs of your registration sheet.

Give your secretary a generous gift and compliment since she/he has probably worked harder than you have.

Take a vacation, aspirin, or whatever else turns you on (or off).



"Overview of Florence," Eduardo Zappi, M.D. From the 1980 art exhibit of the American Academy of Dermatology, New York, New York. Photograph courtesy of Hoechst-Roussel Pharmaceutical, Inc.

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