

# Planning a Point-of-Care Network On-site Meeting and/or On-line Webinar

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## ON-SITE MEETINGS: HOW TO GET STARTED

1. Primary decisions:
  - Location
  - Date (plan for a Friday) - be sure to check other professional calendars for local or national meetings that may be a conflict (ex. AACC, ASCP, CAP, etc.)
2. Once the location and date are settled, decide on topics to present. Be sure to review the minutes from the past two meetings (found on [www.pointofcare.net](http://www.pointofcare.net)) for past suggestions or ideas. Be sure to start early with general topics and once the group is established, move into more specific topics. Each meeting should be planned around at least 2 speakers, for variety of speaker and topic.
3. Secure the room, assuring to plan for additional space to allow for caterers to come in and out without disturbing presentations that may be going on. Also, plan for approx. 100 participants. Assure that the AV needs provided in this room is adequate for this meeting. Also be sure to check any rules associated with use of the room (ex. no vendor solicitation) to assure SC POC Network complies.
4. Involve Medical Automation Systems' Steve Valorz ([svalorz@rals.com](mailto:svalorz@rals.com)) once the decision is made about date and location. He can post notices on the website as an early announcement. Keep him informed as you progress with planning and the agenda.
5. Once topics are decided, speakers will need to be secured for meeting date. To access speakers for topics, contact the Speakers Bureau of all major organizations or speak with vendors or past planning committee to determine who might be best to address the topics chosen. You will need to discuss speaker fees, travel and hotel accommodations and any AV requirements with them.
6. Begin planning a meeting agenda, with specific times for the speakers, breaks, lunches, etc. Be sure to include plenty of "question and answer" time after each speaker. (Speakers will need to know quickly how much time to plan for and if they speak in the AM or PM in order to plan the presentation and flight/hotel arrangements.)

7. Along with securing speakers, the Planning Committee should begin securing funds for speakers' fee, travel and lodging. In addition, fees for breaks & lunch need to be secured. A detailed record should be kept of who has committed and for what amount. The AdvaMed Vendor Code of Ethics must be adhered to during all planning and execution of funding. Be sure to have vendors provide payment directly to the company or individual that is providing the service. For example, if a vendor commits to provide lunch, the vendor should pay directly to the company providing the food. Not only will this keep your facility in-line with the AdvaMed Code of Ethics, it will also help to delegate planning responsibilities to the vendors.
8. Decisions should be made regarding break and lunch menus. Begin securing vendors to fund breaks and lunches quickly, as they may wish to search for the best pricing. (However, since you are the 'local', they may ask you for suggestions or even ask you to place the order.) Be sure to discuss with the caterer all details of the meal/break and the day, including small items such as lemon for the iced tea and plastic silverware, napkins, etc.
9. Are there other large presentations or items to be planned? Examples include a vendor fair, a Business Meeting for SC POC Network or items to be ordered for the meeting (ex. tote bags, notepads, pens). If so, plan these now. These ancillary items can also be obtained through vendor financial support & involvement.
10. The packets for the meeting should include an agenda, copies of all speakers' presentation (with spaces for notes), and a critique or evaluation form for the meeting. A writing pen would also be helpful (check with vendors for contributions). Bios of the speakers should also be included. An index card or two might also be included for those attending to submit questions to speakers in writing for the Q&A sessions after each presentation. Be sure to obtain copies of presentations from speakers at least 1 month prior to the date of the meeting. This will insure that you have ample time to prepare the copies & packets. You will need to decide who will be responsible for generating nametags. The nametags should be printed 1 week prior to the meeting date & should be run from the RSVP list. Vendor support can also be provided to purchase & generate nametags & presentation folders.
11. Opening remarks should include a welcome with acknowledgement of planning committee and host facility, location of bathrooms, smoking area and telephones, and acknowledgement of vendors. (Take every opportunity to recognize vendor support by announcements, posters and recognition of each individual contributor.) You might also include an icebreaker.
12. The remainder of planning involves detail items.

## TIMELINE FOR PLANNING

4-6 months prior	Set Location (determine ay prior meeting)
4 months prior	Determine exact date and secure room
4-6 months prior	Secure Speakers
3 months prior	Set agenda and notify Webmaster
3 months prior	Begin securing financial support from vendors (Know your needs before you ask)
2-3 months prior	Secure catering needs (Be sure to check with in-house catering for any restrictions.)
2 months - 6 weeks prior	Send rough draft of invitations to Steve Valorz Final invites will be sent through E-mail
2 months-1 week prior	Gather RSVPs (for nametags and attendance sheets as well as attendance & catering count)
1 month prior	Have printed materials copied for participant packets (agenda, presentations, ballots or feedback forms, certificate of attendance, etc.)
1 week prior	Double-check with speakers Double-check with vendors (funding and attendance) Double-check with caterers Notify all who need to know of final count of Attendees Check for details
Night before Meeting	Set up room Pick up speakers from airport if necessary Check all AV equipment for proper operation Take a deep breath...
Day of Meeting	Arrive early and have support staff ready to assist with last-minute issues/details Last minute check with speakers for any special arrangements, needs or changes Greet participants as they arrive Make informal introductions Start the meeting on time and keep it on Schedule Be ready with welcomes, housekeeping, introductions, phone locations, etc. Have fun and enjoy your success!!!

**CHECKLIST FOR PLANNING**

Item	Assigned To	Date	Notes	Date Completed
Meeting Date				
Meeting Location				
Secure Room for meeting				
Speaker(s)				
Financing for Speaker(s)				
AV needs for Speaker(s)				
Hotel/Travel for Speaker(s)				
Agenda for meeting				
Catering for AM Break				
Catering for PM Break				
Catering for Lunch				
Other needs for meeting?				
Tablecloths? Flowers? Board for writing? Index cards for Questions? Name Tags? Handout Packets? Ballots (if needed)? Update forms to be available? Certificates? Other hand-outs				
Staffing of registration table for day of meeting				
Welcome and Announcements? (VP or Medical Director??)				
Send agenda to Steve Valorz for invites and website (RSVP date?)				
Directions to Steve Valorz for website				
Discount hotel rates for those attending? (Send to Steve Valorz for website)				

**CHECKLIST FOR PLANNING**

Who will keep the RSVP List? (include their E-mail with invitations)				
Send a reminder E-mail to all on the mailing list?				
Speaker gifts?				
Door prizes?				
Set-up of room?				
Transport of speakers?				
Dinner the night before?				
Signage at facility for finding location?				
Start on time/End on Time - someone to keep the meeting on track?				
Who will fill in names on certificates?				
Digital camera needed for photos during the meeting...				
Post meeting - *Gather eval forms and tally the data. *Type minutes and send to Steve Valorz for website *Update SC POC mailing list from change forms gathered at meeting *Update the handbook and pass to the next site host				
Receipts for vendors?				

## VENDOR INVOLVEMENT AND SUPPORT

Keep in mind that the goal of the SC POC Network is to provide an outlet for networking and education that is as vendor-neutral as possible. While these meetings are not possible without vendor support, we must provide a fair and ethical method of participation for all involved.

*The following is a list of vendors who have provided support for past meetings:*

- Medical Automation Systems/RALS
- Medtronics
- Abbott Diagnostics
- Roche Diagnostics
- LifeScan/J&J
- Beckman-Coulter
- Cardinal Health
- International Technidyne Corporation
- Helena Laboratories POC Division
- Becton-Dickinson
- JCAH
- Bayer Diagnostics
- CAP
- Siemens
- Telcor
- Biosite
- Inverness



## CATERING

Given the ever-changing AdvaMed rules, meetings need to be educational for vendors to participate financially. This is why having a vendor fair, where the vendor pays for a table, is the best way to handle this situation. Monies received from the vendors can then be used to pay for food, raffle items, etc.

Catering can be handled by the host site or by the vendor(s) choosing to sponsor that portion of the meeting. Consider food that will provide for a variety of dietary needs (i.e. kosher, vegetarian, low-carb, low-fat).

When planning with the caterer, be sure to determine when you should call back with the FINAL count of those who will be attending. (A buffer of at least 10 extra should be added to this number.) If the food selected requires heating, be sure your site allows sterno to be used for heating the food (prior to committing to that caterer). Ask for a copy of the order to assure accuracy long before the meeting. Be sure to ask and have them list out items such as salt/pepper, napkins, drinks with ice and artificial sweetener, etc. Also, desserts are nice thing to provide with lunch if possible. Ask for additional drinks and be sure to include iced tea (sweetened and unsweetened) as well as sodas and bottled water. Coffee is also requested at most meetings.

At least one week ahead, call again to confirm the order and delivery date and time. Make sure to allow enough time for set-up of the food when planning the caterer's arrival time. Also, remember that the AM Break food must be moved before the lunch food can be placed, etc. Have staff available to help with this.

If a vendor is able to, the one financing the food will most likely need a copy of the receipt and should pay the caterer directly (usually a day or so before the meeting).

If possible, having the food in a room separate from the speaking area is preferred. This will allow for caterers to enter and set up without disturbing the speakers and participants who are interested.

## OTHER ACTIVITIES or HANDOUTS??

Other Possible Activities planned during the meeting are:

- Group Business meeting (should be done early in the meeting)
- Vendor Fair
  - Confirm with vendors who will participate
  - Lay out space requirements for vendors
  - Set-up time and take-down time
  - Any restrictions?
  - Vendor needs for electrical, etc.
- Review of Code of Ethics (this should be planned for Spring 2005 meeting)
- Group discussions or participation activities
- Completion of ballots or forms - if results are to be discussed on that day at the meeting, give out forms as folks enter, use lunch to tally results and present results in the PM

Be sure to allow time for:

- Mingling before meetings and at break time
- Q&A time after each speaker finishes
- Networking during break time
- Bathroom breaks in the middle of long presentations
- Time for vendors (if a vendor fair is included)
- Wrap-up time
- Group Photo for posting on the website

## ON-LINE WEBINARS:

### Why Webinars?

- The reality is that travel, direct mail, trade shows, print advertising, and telemarketing simply aren't cost effective any more.
- Thought leaders are abandoning strategies burdened with staff increases, short reach, slow return, and vague response metrics.
- These days, it's all about actionable, high-impact, short-cycle strategies with a strong ROI.
- One of those strategies is online POCT webinars
  - Webinars are Professional, Impressive & Cost Effective
  - They are Intelligent, Innovative Marketing
  - They Demand strict attention to detail
  - But Success depends on . . .
  - Preparation, Execution, Follow-up and Consistency

### POC Webinars are available through Whitehat Communications

- Whitehat manages the webinar process from start to finish including:
  - Pre-Event Preparation and Marketing (with help from POC.net)
  - Event Facilitation
  - Post-Event Surveys, Recordings and Slides
    - Posted on POC group website
- The Numbers Speak for themselves...
  - An average of **60-75** people/attendees register
  - 2-3 Additional Attendees per login (estimate)
  - Total attendance estimated at **120-150**
  - **95%** of survey ratings: High and Excellent.
  - **94%** will attend 2 webinars per year
  - **50%+** will attend 4 or more/year

## Scheduling a POC Group Webinars

1. Contact Whitehat Communications  
2220 Ivy Road, Suite 402, Charlottesville, VA 22903  
Email: [rick.import@whitehatcom.com](mailto:rick.import@whitehatcom.com)  
Phone: (434) 202-8365
2. Select a date and time for your webinar
3. Select a speaker and topic:
  - a. [http://www.pointofcare.net/POC\\_Webinar\\_Speakers.htm](http://www.pointofcare.net/POC_Webinar_Speakers.htm)
4. Provide a list of emails to invite people
5. Whitehat will provide an email message to invite people in your group as well as registration details
6. Webinar information as well as registration details will be posted on [www.pointofcare.net](http://www.pointofcare.net)
7. Emails will be sent out prior to the event
  - a. Save the Date
  - b. Email 1
  - c. Email 2
  - d. Email 3
8. Whitehat will manage the registrations and provide information on how to 'attend' the webinar - ie listen by phone and login to view slides
9. Whitehat will arrange a rehearsal prior to the event for all presenters
  - a. Note: The POC Group needs only to provide a 'host' that can introduce speakers

## What does a Webinar cost?

Thanks to the generous support of POC vendors, webinars cost POCCs nothing. Vendors pay for time on the webinar (usually 2-3 minutes) where they can promote their products - much like an ad in a journal or commercial on TV.

## SPEAKERS

There are numerous resources for choosing and securing speakers for these meetings. Most of the larger organizations have a Speakers Bureau through which you can schedule. (Usually, there is a fee associated with these speakers. Be sure to get vendor sponsorship for these before committing.) Also, vendors who visit your facility have been to other meetings and can offer tips on speakers they have heard.

Be sure the speaker you select can adequately address the topic(s) you have selected for the meeting. Remember to plan several of the first meetings based on general topics (the group is young....) and later move into more specific areas.

Some of the topics suggested at our inaugural meeting include:

- Regulatory issues
- Current and new technology
- POC Billing
- Connectivity
- Models or Best-Practice (Structuring) for POC
- Tools for Management of POC Programs
- Recap or Synopsis of Larger meeting topics (AACC, CLMA, etc.)

Check out literature for the possibility of big-name speakers.

Ask the opinions of other POC Coordinators to assure that topics are of interest and will attract folks to attend. Steer away from instrument-specific topics that all sites may not have. Steve Valorz is a very essential and helpful resource, since he deals with many POC groups across the nation and can offer valuable input.

For webinars, a complete listing of speakers and topics can be seen at:

- [http://www.pointofcare.net/POC\\_Webinar\\_Speakers.htm](http://www.pointofcare.net/POC_Webinar_Speakers.htm)

## ANNOUNCEMENT OF MEETING OR WEBINAR

[www.pointofcare.net](http://www.pointofcare.net) and Steve Valorz with MAS should be informed and included early in the planning of the meeting. Steve will format the E-invitations to be sent to all on the mailing list. You will provide the updated mailing list to Steve for sending of the invitations.

The initial announcement and invitation should be sent at least 8 weeks prior to the meeting. Be sure to include a reliable E-mail address for attendees to respond to and any requirements or suggestions for parking. A phone number (with a contact person or department) should be included for those who need to call the morning of the meeting. A digital photo of the building where the meeting is located is also helpful.

Directions to your facility can also be sent to Steve for inclusion on the website. If there are special agreements with hotels in your area, it would be nice to include the name of the hotel, the phone number for reservations and any special notification members should make to receive the special rate.

If any other activities are planned around this meeting, these should be included at least on the website.

MAS provides the work for the website, invitations and other assistance as needed. Steve is an invaluable resource, and is very knowledgeable about these meetings and how they should run.

Be sure to forward and share the invitation to other parties within your institution that might be interested (even if only in one session).

## FINANCIAL NEEDS AND TRACKING

Given the ever-changing AdvaMed rules, meetings need to be educational for vendors to participate financially. This is why having a vendor fair, where the vendor pays for a table, is the best way to handle this situation. Monies received from the vendors can then be used to pay for food, raffle items, etc.

Some POC Groups have an account set up for handling the \$\$\$ transactions. This may change in the near future due to the implementation of the vendor Code of Ethics. This should be discussed and voted upon at a meeting with the group in attendance.

In the meantime, the host facility should begin asking early about vendors who will provide financial support. Items that will require funding include (but are not limited to):

- Food
  - AM Break
  - Lunch
  - PM Break
  - Dinner the night before???
- Speakers
  - Speaker Fee
  - Transportation (Air and ground?)
  - Hotel
  - Meals?
  - Gifts?
- Any additional items provided or required
  - Tote Bags?
  - Pens?
  - Name Tags?
  - Paper products for meeting discussions?
  - Certificate of Attendance printing?
  - Raffle tickets and prizes?
  - Other?

Keep records of commitments (both verbal and in writing) from vendors in order to track the finances.

## OTHER DETAILS

All basic details are covered under other sections of this handbook. Here are a few optional (small) details that can make your meeting memorable:

- Ribbons or special name tags for the planning committee
- Ribbons or special name tags for Speakers and/or Vendor Sponsors
- Use the your group logo on every document that you can --- this makes our meeting belong to "us"
- Special recognition for any "right-hand men" you may have had during the planning and set-up of the meeting
- Other???

## FINAL WORDS OF WISDOM (Lessons learned...)

1. Start planning early.
2. Stay focused on the goal of POC Networking and Education.
3. Work from a checklist.
4. Stay organized.
5. Solicit help from within your area and/or organization.
6. Have fun!
7. Start the meeting on time, stay on schedule and end on time
8. Don't worry about the weather---things seem to work out anyway!

## CONTACTS FOR SUPPORT AND REFERENCE

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