



Indiana Society of Medical Assistants

Affiliated with the American Association of Medical Assistants

ISMA Conference Guidelines

March 13, 2018

Updated July 16, 2020



ISMA Conference Guidelines

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

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MEETING/CONFERENCE

1. The ISMA Annual Conference will be held in April, unless otherwise designated by the Board of Directors.
2. The place is to be announced each year by the Board of Directors no later than the first board meeting following the conference.
3. The City and date shall be announced 18 to 24 months in advance.

Theme

1. Pick a theme for the conference and submit a copy with registration form to Med-A-Scoop.

Schedule

1. Plan a schedule of events for the conference and workshops getting speakers for each.

Conference Rotations- this is used to determine the hosting chapter.

Year	Chapter
2013	First District
2014	Southeast District
2015	St Joseph District
2016	East Central District
2017	West Central District
2018	Twelfth District
2019	First District
2020	No Conference Covid-19
2021	Southeast District
2022	St Joseph District
2023	East Central District
2024	West Central District
2025	Twelfth District
2026	First District
2027	Southeast District
2028	St. Joseph District
2029	East Central District
2030	West Central District
2031	Twelfth District
2032	First District
2033	Southeast District
2034	St. Joseph District
2035	East Central District
2036	West Central District
2037	Twelfth District
2038	First District
2039	Southeast District
2040	St. Joseph District
2041	East Central District
2042	West Central District

Conference Guidelines

1. The prior ISMA Conference chair shall be available to mentor the incoming ISMA Conference committee. A conference chair is to be appointed by the Hosting Component District.
2. The Conference chair is to set up all committees needed for the conference and seek participation to complete the committee work and assure deadlines are met.
3. Conference Chair and the Hosting District shall be responsible for securing the hotel and plan all meal functions, within a set budget. Also make hotel arrangements for AAMA representative, ISMA President and Conference chair and Co-chair.
4. Profit monies after paid expenses are divided between the hosting District and ISMA unless the Conference is hosted by the State.
5. Utilize the AAMA Representative for focus group during the ISMA conference weekend.
6. Have a copy of the full ISMA conference agenda and registration form available on the ISMA website, ISMA registration desk at check- in; announce changes as necessary during the conference.
7. Keep ISMA President advised of number of registrants.
8. Advise Certification chair as to number of certified and recertified registrants.
9. Prepare report for ISMA Board of Directors for the Annual Business meeting booklet.
10. Write a welcome for the conference booklet.
11. Arrange for Saturday banquet entertainment.
12. Obtain proclamation from local government.

The hosting district may borrow up to \$500.00 from ISMA to start the conference fund if that chapter does not have enough to fund this initial outlay. In such event, these borrowed monies are to be repaid out of the conference revenues, depending upon funds available.

Preliminary Planning

- Set site and date
 - Competitive bid should be obtained, when possible. This will insure obtaining the best location and facilities for the most reasonable rates.
 - Be sure that your hotel headquarters is satisfactory for your need.
 - Available guest rooms
 - Space for registration
 - Meeting room facilities and audio/video equipment availability.
 - Facilities for banquet, dinners, luncheons, cocktail parties, and other social events to be held at the hotel.

Conference Site

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

The choice of location should be based on several factors:

- Hotel should be adequate space for the following if needed.
 - Educational sessions
 - President's banquet
 - Exhibitors
 - Welcome party
 - AAMA Representative's meeting
 - ISMA Pre and Post board of directors meeting.
 - Any special events and adequate hotel rooms for anticipated attendance.

Questions to ask of the potential hotel site.

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

1. Detailed written bid/contract from the hotel stating the total cost of meals, including gratuities and any other charges involved should be obtained.

2. In addition to the bid for meals, the Conference committee should obtain a written description in the contract of any complimentary features and what special services or assistance the hotel will supply at no extra cost.
3. A list of the charges, including taxes, surcharges, etc., for the cost of attendee rooms should be listed in writing for single, double, triple, and quadruple room occupancy. This information should be listed on the registration form available to each member and listed on the ISMA Website.
4. Determine and have the hotel block off the number of rooms needed for guests (determine if rooms are needed for handicap accessibility), for business meetings or committees, and educational sessions, and meals.
5. Determine the number of microphones and speaker podiums necessary, and locate electrical outlets, audio-visual equipment needed and technical support staff.

Task delegations

The hosting district should form a team for the conference. There are many different tasks in planning and hosting a successful ISMA conference. These tasks should be delegated to various committees, so that no one member has a disproportionate share of duties. A Conference Chair is essential and a conference Co-Chair may be appointed. Duties you may need to assign;

- Finance
- Hotel reservations
- Decorations/favors/goody bags if applicable
- ISMA conference registrations
- Exhibitors
- Welcome party/Entertainment
- Ways and Means
- Protocol
 - Proclamation
 - Honor Guard
 - Meal line up
 - AAMA representative liaison
- Educational Sessions
- Meals/breaks
- Hospitality room
- Annual business meeting raffle container for district door prize
- Coordination with ISMA installing officer

Financial Management

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

1. Attend all conference meetings.
2. A special bank account should be established by the hosting district for the sole purpose of transacting the financial business of the conference with the conference chair and/or conference treasurer authorized to sign checks. All monies received should be acknowledged with a receipt, and all monies spent should be accounted for by invoices. Receipts, invoices, cancelled check, duplicate deposit slips and ledger for the conference should be ready for audit as soon as possible after the conclusion of the conference.
3. Prepare an itemized list of all items to be reimbursed to the conference committee by ISMA for the ISMA Treasurer. (See listing of ISMA conference cost responsibilities).
4. After the close of the conference business, furnish the ISMA Treasurer and the Finance Chair with a complete financial report by the June meeting.
5. Repay the loan back to ISMA if this applies. This is separate expense owed to ISMA by the hosting chapter.

Major expense items to be considered include:

Conference Expenses

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

Conference Income

- Registration Fees
- Contributions
- Exhibit space rental

ISMA Financial Responsibility

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

It is the financial responsibility of ISMA to pay the following expenses incurred during conference. These items should be billed separately to the ISMA Treasurer. This should be reflected in the ISMA Conference budget.

1. Welcome item upon arrival for the AAMA Representative such as snacks, refreshments, etc. Communicate with AAMA Representative before conference.
2. AAMA provides transportation for the AAMA Representative to the ISMA Conference. Arranging transportation to and from the airport for the AAMA Representative is set up by the hosting district.
3. Hotel accommodations for the AAMA Representative.
4. Full registration fee for the AAMA Representative.
5. All meals for AAMA Representative.
6. Decorations (floral, candles, etc.) for the installation table.
7. Registration ribbons for the name badges, the name badges and lanyards.
8. Annual Business Meeting Booklet
9. If for some reason the AAMA Representative arrives early it will be the responsibility of the ISMA liaison to make additional accommodations for them. If there are outside activities involved it will be the discretion of the ISMA liaison to pay for them or the state pick up the expense. If someone is picking up the representative, they will pay for themselves for any activities outside of the conference.

The registration fees and rooms of the elected State Officers, Parliamentarian and Corresponding Secretary, AAMA Representative, Conference Chair and Vice Chair are paid by the state. Lodging accommodations will be reimbursed at one-half equivalency except for the AAMA Representative. One suite will be provided for the President and Corresponding Secretary.

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

Conference Receipt

If you have a receipt needing reimbursement please fill out a voucher and submit it to the treasurer. If this is not a budgeted expense, it will have to be voted on before being paid.

If a member needs a receipt for the expense of the conference for employment, or school, etc. please contact the treasurer of the conference or hosting district and they can provide a receipt with necessary information on it.

Registration

- List hours the registration desk will be open. The hosting district members should be assigned to staff the registration desk during open hours, unless other arrangements have been made.
- Maintain a complete list of all paid registration received for the conference.
- Order ribbons and make available in all categories to members as needed.
- Material you may wish to include about the surrounding area.
- CEU sheet for AAMA.
- Evaluation form of ISMA conference.
- Meal tickets.
- Names of Exhibitors.
- Official program of events.
- Registration forms should be included in the Med-A-Scoop and on the Web-site at least 6 weeks prior to the conference.
- Goody bags/door prizes if applicable.

Registration Forms

Information to include on registration form:

- Annual Conference year and number
- Date
- Location-Hotel name, address, phone numbers, website address, deadline for registration and cost.
- Registrant's Information

Name, address, home & cell/work phone, district, office/board or committee.

Membership Status-member, non-member or student.

New or recertified CMA-(AAMA) since last conference.

First time attendee, educator.

Registration deadline (early bird and late).

Indicate no refund and type of payment that is accepted.

Member, non-member, student member and non-student member registration fees.

Single day registration rate which will include meals.

Single meal cost for guest.

Where to send payment with registration form and whom to make payment to and e-mail addresses.

Registration packets should include:

1. Name tags-with the registrant's name, credentials, district
2. Material you may wish to include about the surrounding area
3. 2 CEU sheet for AAMA (one for member & AAMA)
4. Evaluation form for conference
5. Meal tickets if applicable
6. Names of exhibitors
7. Official program of events including CEU's
8. Sponsor/vendor listing, acknowledgements and thank-you

Decorations

Decorations committee or appointed members is in charges of decoration for the entire conference. This includes:

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

Affiliated Donations

Donations should be solicited from the area healthcare community if possible. Often hospitals, physicians' groups medical practices, pharmaceutical representatives, insurance companies, pharmacies, uniform shops, clinical supply companies, etc, are willing to donate funds or services to help make the conference a success. Be sure to use as many resources as possible and members of the hosting district.

Goodie bags, containing pharmaceutical promotional items that are donated to the conference such as pens, pads of paper, etc. are optional but are fun souvenirs to take home. These bags are handed out to attendees as they register.

Welcome party

Plan the Welcome party using the ISMA conference theme and appropriate group participation activities, favors, decorations and prizes. The Welcome party is usually the first evening of the conference.

Speakers

Speakers should be consulted regarding any needs they may have to present their program. Needs may include, but not limited to duplication of handouts, podium, type of microphone preferred, and any audiovisual equipment needed. The hotel may furnish some of this equipment at no additional charge. ISMA has audio/visual equipment available for use. One member should be the contact for the speaker/speakers. This will eliminate any duplication of effort and miscommunication. Things to remember for each workshop.

- Topic should have been published before conference time
- Obtain CEU approval
- Obtain CEU registration sheet
- Appreciation gift/note
- An allotted time should be assigned and every effort should be made to adhere to the schedule should be made

Exhibitors

Letter should go out to potential exhibitors as soon as possible and include:

1. Dates and location of the conference.
2. Information about ISMA and the goal of our organization.
3. The cost of exhibit space, which is determined by the hotel plus additional for conference charge.
4. Size of space available, number of tables, chairs, access to electricity, etc. provided.
5. Dates and times to exhibit and by what time setup is required. Suggest exhibit hours on Saturday and time that are not interfering with other portions of the conference. The availability and cost of meal tickets if applicable.
6. Set deadline for response.
7. The name of the companies exhibiting and the representatives of those companies should be obtained. A packet should be prepared for each company that include a program, name tags for the representatives and any meal tickets if purchased or provided by ISMA.
8. There should be one member assigned during the conference to act as a liaison by greeting and assisting the exhibitors.
9. Each exhibitor should offer a door prize.

Meals

- The cost of the meals is included in the cost of the registration fee and will cover breakfast, lunch, dinner, unless other arrangements have been made. Meals for guests should be offered and the cost of each meal should be noted on the registration form, so that members wishing to purchase additional meal tickets can do so when they register.
- If there are allergies please note these for planning meals.
- There should be a head table for the retiring and newly elected officers, MC and AAMA Representative for the Saturday awards and installation banquet.

Hospitality

If possible, have a room for hospitality where snacks can be provided when there are breaks. There will be no charge for these snacks.

ISMA President Responsibilities

The President's theme should be used whenever possible.

1. The ISMA Conference Chair should keep the ISMA President informed on all matters regarding the conference.
2. Prepare an agenda for the annual meeting.
 - a) It should be distributed to the membership at least 30 days prior to the meeting.
 - b) Prepare a script and submit a copy to the parliamentary advisor at least two (2) weeks prior to the meeting.
 - c) Provide the recording secretary with a copy of the finalized script at the meeting.
3. Attend conference planning meetings whenever possible.
4. Prepare a letter for the program book with a picture if requested.
5. Prepare the annual meeting book with all committee reports including the proposed budget.
6. Extend printed invitation to the President of AAMA, the ISMA physician advisors and any AAMA Advisor or Board of Trustees members from Indiana.
7. Appoint committees for the Annual Meeting.
 - a) Credential committee (3-4 members)
 - b) Annual meeting minutes audit committee
 - c) Financial audit committee
 - d) Timekeeper
 - e) Tellers (4-5 members including chair)
 - f) Pages (4-5 members including chair)
 - g) Memorial Service (Chaplain)
 - h) Order a gavel with an engraved band to present to the incoming president at the banquet. The band should indicate the president's name, credential and term of office dates. Repeat presidents should utilize the gavel used during the preceding term of office.
 - i) Purchase gift for AAMA Representative, not to exceed \$50.00 as an ISMA expense.
 - j) See page 16 for seating of business meeting.

Flowers

Conference committee should provide a listing of locations or have a recommended florist to purchase corsages and or flowers as needed for:

- State officers
- AAMA Representative
- Special guest

Individual chapters may want to purchase flowers and or corsages to honor their presidents. It is suggested that advance orders be taken for these corsages.

Banquet

The incoming ISMA President has the privilege of choosing an installation officer. The installation service for the incoming ISMA President should be coordinated with the conference chair, including any special needs. Remember this is a professional function and people should dress professionally. (see pg 17 for seating)

Guest Seating and Protocol

If guests and speakers are present for the banquet there should be a special table for them close to the head table.

General Head Table Seating

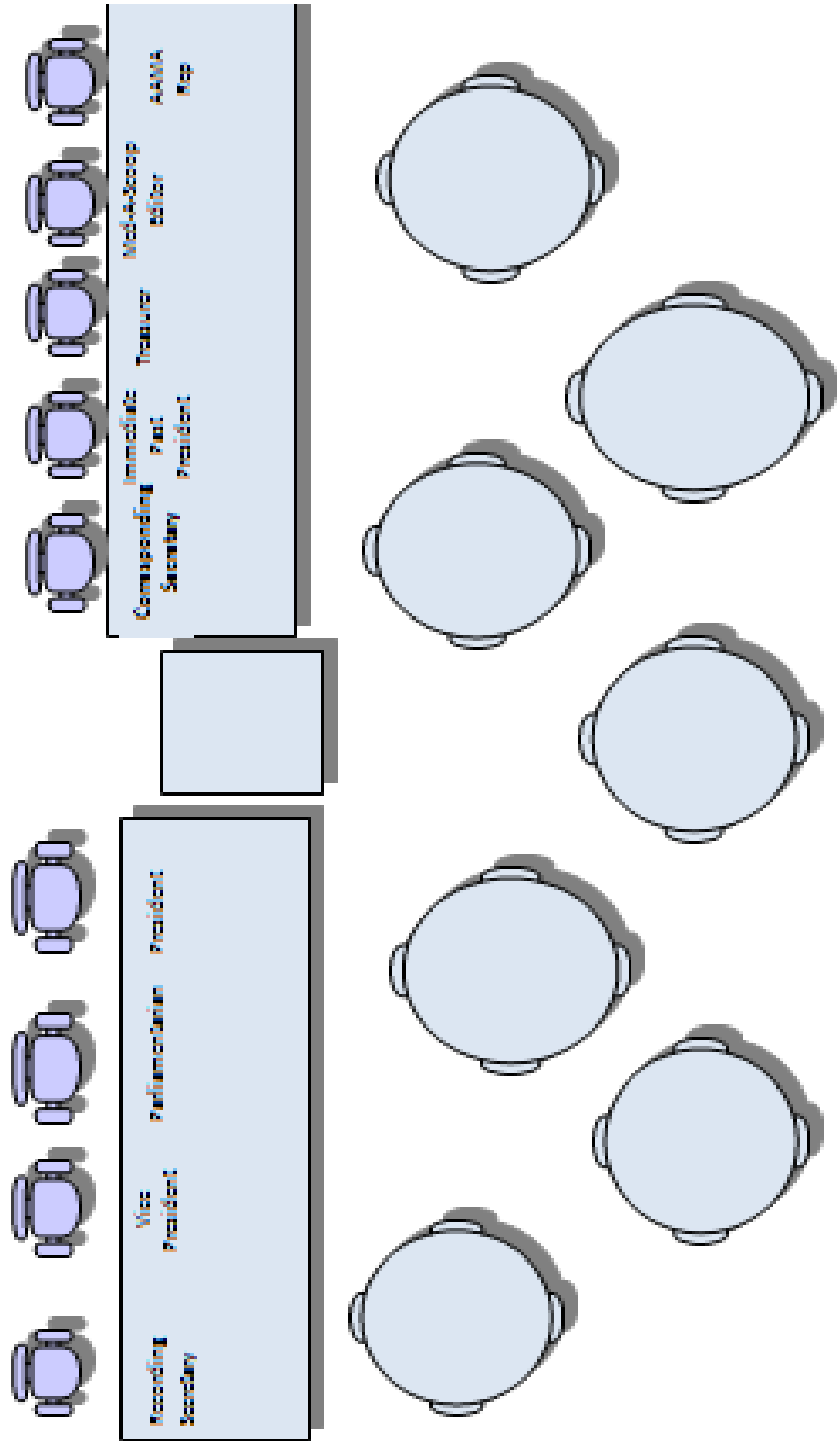
ISMA President should extend greeting and present presiding MC of ceremony. Seating as follows:

1. The ISMA President is always seated in the center right, whether or not she is the presiding chairman.
2. If someone else is presiding, that chairman is always seated center left.
3. The ISMA officers are divided on either side along with AAMA Representative and Conference chair and Co-chair.

Post Conference

- Submit CEUs to AAMA within 30 days of Conference.
- Appreciation to conference team by Conference Chair.
- Conference chair presents a final financial report at the ISMA board of directors June meeting with a check for one-half of the proceeds if applicable.

Business Meeting Seating



Banquet Seating

