



How to Develop a Successful ITNS Chapter Educational Symposium

Congratulations! You have successfully chartered an ITNS Chapter and now it is time to plan your 1st educational symposium! Planning a successful local chapter seminar/symposium will take forethought and time, will demand great attention to detail, and will require several months of planning and coordination, but can be a very rewarding experience. If you follow these simple tools and suggestions, you should be well on your way to developing a successful Chapter Symposium.

Most chapter seminars are scheduled as a ½ day or full day event, but if you can partner with another ITNS chapter, you may have the resources necessary to plan a 2 day event. You will need to appoint 1 or 2 chapter educational event chairperson(s), who can plan and execute the event and steer a planning committee. Prior to conducting any research into venue selection, make sure you are familiar with the basic outcomes behind the event. You will need to ask yourself several questions.

1. Who is the audience? (How can we best reach our target audience?)
2. Where should the meeting be located? (Date of meeting, on or off campus, coordinator/unit nurse needs?)
3. What is the topic/theme of the seminar?
4. Why will people attend? (What are the measurable outcomes of the program? What will they learn?)
5. What is our chapter budget for the event? (Food/ beverage, rooms/speaker/audio visual needs, printing costs, CEU fees, hotel accommodations?)
6. Are there companies who may be interested in sponsoring this event?
7. Do we plan to have exhibitors at the event?

Planning for a symposium should begin ***at least 6 months*** before the scheduled event. The chairperson(s) should establish a committee or committees that will meet regularly to plan the event.

Getting Started

See *Chapter Educational Symposium Checklist for activity timeline (APPENDIX A.)*

- Choose a seminar theme relevant and appealing to your audience needs.
- Develop a *Seminar/Workshop Planning Worksheet*. (APPENDIX B.)
- Schedule a date that does not conflict with other events and is convenient for most of your target audience or chapter members.
- Create an *Event Profile*: (APPENDIX C.)
 1. Develop a list of possible venues and conduct site visits.
 2. Make sure your meeting location is centrally located, reasonably priced, can accommodate your group, is easily accessible, and has adequate parking.
 3. Inquire about audio-visual equipment/screen/podium/microphone expenses.
 4. Secure discounted local hotel reservations if you are expecting out of town speaker(s) or attendees.
 5. Hire an AV technician to be dedicated to your event if your budget allows.
Develop a preliminary budget for the event: Identify expenses such as food/beverages, conference room costs, speaker honorarium/ Audio/visual and printing costs, CEU expenses, and hotel accommodations. Estimate the minimum attendance required, and divide expenses by attendance to determine your break-even charge; add a profit amount that makes the event worth conducting.
- Send a “Save the Date” flyer as soon as possible so that interested participants can request off to attend the meeting. Email the flyer to Muneeb Jaffry at mjaffry@itns.org so that it can be posted on the ITNS website and sent to other ITNS Chapter Leaders.
- Identify a keynote speaker to give a 45 minute presentation with 15 minutes for questions and discussion. Identify remaining speakers to give a 30 to 45 minute presentation. If you have corporate sponsors or partners for your program, you may want to consider a speaker relevant to their target area while still maintaining the educational integrity of the program. Continuing Education accrediting bodies have certain requirements regarding educational versus promotional speakers. Use speakers who are knowledgeable about your program topics, who are familiar to the audience and have experience in giving presentations.
- Write a letter of confirmation to each speaker outlining presentation topic and time frame. Request their credentials, the title of their presentation, three outcomes, three to five current (within the last 5 years) scientific references and their Curriculum Vitae. These will be needed for your CEU and/or CEPTC application. Give the speaker a specific deadline to respond. Ask speakers if he/she will email power-point slides (determine date needed) or if speaker will bring them to the event on a USB drive.
- Contact all potential sponsors and submit a grant request according to their company requirements. Ask the sponsor if they would like to exhibit at the conference (if applicable). If you are interested in obtaining sponsored support, call a vendor or drug representative as soon as possible. Their financial support can be quite variable and the

decision regarding the type and expense of a meal or beverages may be driven by the vendor.

- Set registration fees and refund policy. Take into account a discount for members and students. Encourage non-member registrants to join ITNS and also become a member of your local chapter.
- Determine if you will schedule Break-out Sessions or if your participants will remain together in a Plenary Session throughout the program. (Break-out sessions do not usually work well unless you have at least total 75 participants.) Assemble potential sponsors, exhibitor lists, sign contract for venue and hotel. Choose beverage and food service according to budget and sponsor requirements. Meet with meeting room/ restaurant staff and arrange for seating arrangements, speaker needs, registration table, and extra tables needed for chapter educational materials, etc.
- Prepare and print program agenda. (*Conference brochure. (APPENDIX D.)*) Mail/Email to prospective participants. Don't forget to send to ITNS chapters in close proximity to your venue and Muneeb Jaffry at mjaffry@itns.org for posting. Post to your chapter website, on all nursing units and within the transplant center. Inquire if your program details can be placed on your hospital calendar.
- Apply for *Continuing Education credits* or CEPTC credits for certified transplant nurses or coordinators through your local education office.
- Contact sponsors/vendors for offers to donate conference tote bags and other incentives for the participants. If you are planning to hold a conference raffle, contact local businesses and chapter members for donated items.
- Receive registrations for the symposium and send meeting reminders to your prospective attendees at regular intervals.
- Contact the ITNS headquarters for free educational materials/membership brochures that can be displayed during the symposium.
- Call all speakers, venue staff, AV technician, and sponsors one month and two weeks prior to the event and again a few days before the symposium to confirm all arrangements. It is always important to remind and confirm. Guarantee continuing education credits will be ready by date of event and the number of reservations to meeting site and hotel. Confirm beverage/meal service. Try not to over-estimate your guarantees because you are committed to pay for the number of meals you guarantee 48 hours in advance. As a general rule of thumb, hotels will be prepared to feed people within 10% over your guarantee.
- Develop a program/speaker evaluation form, CEU certificate, and sign-in sheets for meeting, but realize that the accrediting body providing the credits for your program may provide these or have certain requirements.
- Recruit committee members to staff the registration table, speaker table, to meet/greet attendees as they arrive, collect evaluation forms, and distribute CEU/CEPTC certificates.

- Meet with committee members to discuss the program agenda and final details.
- Select moderators for each presentation. Moderators should review the presenter's CV and topic information, script their speaker introduction, and prepare at least one question to be asked after the presentation to initiate discussion.
- Make folders for each participant: program agenda, presenter handouts, in correct order and evaluation forms.
- Create name badges, print registration list, and organize registration materials.
- Determine if all registration money has been collected and flag any attendees who still owe money.
- Assemble ITNS educational materials needed for the event.
- Make direction signs to guide visitors to the event.
- Make "time remaining" signs for the moderators to use during presentations: *5 minutes, 2 minutes and STOP!*

The Big Event

- Prepare and bring to the venue at least one to two hours before the event:
 1. An alphabetical list of registrations
 2. Name tags, in alphabetical order
 3. Extra registration forms for walk-in participants.
 4. Pens
 5. New membership applications (local chapter and international)
 6. Program folders for each participant/tote bags (if applicable.)
 7. Continuing Education Credit Certificates/Certificates of Attendance
 8. Cash box/receipts/money for change
 9. Program evaluations for each participant
 10. Sign in sheet, if required for CEs and CEPTCs
 11. Other materials as needed
- Post directional signs for the event.
- Set up your registration table.
- Inspect and test audio/visual equipment with AV technician.
If the equipment is your own, have an extra projector bulb or projector in case of malfunction.
- Confirm meal/beverage break times with venue staff.
- Meet speakers, review the agenda, and inquire about special needs.
- Meet with committee members/moderators to review assignments.
- Greet participants and assist with registrations.
- Welcome participants, announce washrooms, recognize sponsors, describe break time and meal plans, CEU credits, evaluation forms, switch cell phones to vibrate mode, etc.

- Introduce speakers and ask moderators to remember to thank them for their participation.
- Collect cash and check receipts, and reconcile head count with venue manager.
- Collect registration information and maintain chapter records.
- Thank members for attending, collect evaluation forms and distribute educational credits.

Post Conference follow-up

- Receive meeting invoices and approve for payment. Assure all costs have been covered and complete a post-budget performance.
- Send thank-you letter to speakers, sponsors, and moderators.
- Summarize and review program and speaker evaluations and suggestions for future chapter topics and meeting sites.
- Issue post meeting requirements to continuing education credit provider.
- Provide summary of program for chapter newsletter and website to Muneeb Jaffry at mjaffry@itns.org.
- Debrief chapter board of directors. Discuss good ideas, failures and solutions. Prepare a report of *lessons learned* for future meetings.
- Pat yourself on the back for a job well done!

Remember:

- Some attendees will always arrive early.
- Some attendees will always arrive late.
- A flawless event is rare. Spending some time to make back-up plans is well worth the effort!
- There is frequently some sort of technical glitch.
- The temperature will always be too hot or too cold for someone.
- You cannot please all the people all of the time!

APPENDIX A

International Transplant Nurses Society Chapter Educational Symposium Checklist

Suggested time frames for planning and implementing a seminar are listed below.

Activity

Action Item		Suggested Time Frame	Completion
<p>PRE-EVENT</p> <ul style="list-style-type: none"> • Form an ITNS Chapter Symposium Committee • Begin <i>Chapter Educational Symposium Checklist (Appendix A)</i> 		6 months out	
<ul style="list-style-type: none"> • Identify basic outcomes of your symposium: target audience, location, date, theme, outcomes, budget, sponsors/exhibitors 		6 months out	
<ul style="list-style-type: none"> • Begin Development of the <i>Seminar/Workshop Planning Worksheet (Appendix B)</i> 		6 months out	
<ul style="list-style-type: none"> • Select date for symposium 		6 months out	

<ul style="list-style-type: none"> • Create an <i>Event Profile</i> (<i>Appendix C</i>) 		6 months out	
<ul style="list-style-type: none"> • Conduct site visits, secure venue, hotel reservations, hire an AV technician 		5 months out	
<ul style="list-style-type: none"> • Develop a preliminary budget 		5 months out	
<ul style="list-style-type: none"> • Mail/Email and post a “Save the date” flyer. Email to mjaffry@itns.org 		5 months out	
<ul style="list-style-type: none"> • Identify all speakers • Write confirmation letters/ send program information • Request information required for CEUs 		5 months out	
<ul style="list-style-type: none"> • Contact potential sponsors • Submit grant requests 		5 months out	
<ul style="list-style-type: none"> • Set registration fees and policies • Determine program agenda (plenary vs. break-out sessions) • Assemble sponsor/exhibitor list 		4 months out	

<ul style="list-style-type: none"> • Sign contract for venue/hotel • Discuss meals/beverages and conference details with venue staff 		4 months out	
<ul style="list-style-type: none"> • Prepare, print and mail/Email program agenda. <i>Conference Brochure (Appendix D.)</i> • Email brochure to Allison Begezda at abegezda@itns.org and post at strategic locations 		4 months out	
<ul style="list-style-type: none"> • Apply for <i>Continuing Education credits</i> for program. 		3 months out	
<ul style="list-style-type: none"> • Contact sponsors/local businesses for tote bags and give-away items 		3 months out	
<ul style="list-style-type: none"> • Receive reservations • Send meeting reminders to potential attendees at regular intervals 		3 months out	
<ul style="list-style-type: none"> • Contact the ITNS headquarters for free educational materials/membership brochures 		2 months out	

<ul style="list-style-type: none"> • Contact all speakers, venue staff, AV technician, and sponsors to confirm arrangements • Guarantee CEU credits will be available by symposium 		<p>1 month and 2 weeks out</p>	
<ul style="list-style-type: none"> • Guarantee number of reservations to venue and hotel • Confirm beverage/meal service • Send meeting reminder to participants 		<p>2 weeks out</p>	
<ul style="list-style-type: none"> • Develop program/speaker evaluation form, CEU certificate, sign-in sheets • Meet with committee to discuss program agenda and final details. Assign moderators/tasks. 		<p>2 weeks out</p>	
<ul style="list-style-type: none"> • Make folders/bags for each participant • Create name badges • Print registration list • Organize registration and educational materials 		<p>1 week out</p>	

<ul style="list-style-type: none"> • Make visitor direction signs • Create time remaining signs 		1 week out	
<p>THE EVENT</p> <ul style="list-style-type: none"> • Arrive 1-2 hours before the scheduled program • Set-up registration and education tables • Inspect and test AV equipment with technician • Confirm beverages and meal timing with venue staff • Post direction signs • Assure all committee members/moderators know their assignments • Check with exhibitors to answer questions and troubleshoot 		Day of event	
<ul style="list-style-type: none"> • Meet with speakers, review agenda, and inquire about special needs • Assist with registrations 		Day of event	

<ul style="list-style-type: none"> • Begin program • Welcome attendees • Thank sponsors and speakers • Review agenda of the program and “housekeeping” items 		Day of event	
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<ul style="list-style-type: none"> • Assure speakers and breaks/meals remain on time • Thank speakers, sponsors and participants for attending • Assure completion of evaluation forms • Distribute CEU certificates 		Day of event	
<ul style="list-style-type: none"> • Collect cash and check receipts • Reconcile head count with venue manager 		Day of event	
<p>POST EVENT</p> <ul style="list-style-type: none"> • Collect registration information and maintain in chapter records • Send thank you letter to speakers, sponsors, and presenters 		Within 1 week after event	
<ul style="list-style-type: none"> • Receive meeting invoices and approve for payment 		As received	
<ul style="list-style-type: none"> • Assure all costs have been covered • Complete a post budget evaluation 			
<ul style="list-style-type: none"> • Review program and speaker evaluations and suggestions for future chapter symposiums 		Within 2 weeks after event	

<ul style="list-style-type: none"> • Issue post symposium requirements to education credit provider 		<p>Within 4 weeks after event</p>	
<ul style="list-style-type: none"> • Issue financial and narrative report of meeting to chapter BOD • Discuss outcome of program/issues and lessons learned with chapter BOD 		<p>At next chapter BOD meeting</p>	
<ul style="list-style-type: none"> • Provide summary of program to ITNS newsletter Website and mjaffry@itns.org as part of biannual report 		<p>When biannual report due (April/October)</p>	

APPENDIX B

ITNS Chapter Symposium

Planning Worksheets

Name of ITNS Chapter:

Title of Symposium:

Day/Date of Symposium:

Co-chairs of Workshop: Please complete the following table; (Please PRINT)

Name of Co-Chair	Complete Mailing Address	Phone Numbers: Home, Work, Cell	Fax Number:	Email Address:
Co-Chair #1:				
Co-Chair #2:				

Who should attend this Symposium?

Example: This workshop will offer a unique perspective on the state of the art of living organ donation at transplant centers throughout the world. This workshop is intended to educate the attendees on the collaborative developments of living organ donation. A cross section of experts will clarify topics such as the effectiveness of structured education for the living kidney donor, paired kidney donation after failed desensitization, exploring the non-traditional living donor and expanding transplant options with ABO incompatible living donor exchange. An international perspective will demonstrate the role of the living donor coordinator in various countries and cultures. Please join us to discuss this evolving topic and its benefit to the transplant nurse and the transplant patient.

Outcomes

List at least one outcome for each presentation.

At the conclusion of this seminar the participants should be able to:

- 1.
- 2.
- 3.
- 4.

- 5.
- 6.
- 7.
- 8.

Example: At the conclusion of this seminar the participants should be able to:

1. List three areas of importance in long-term outcomes after living kidney donation.
2. Discuss two strategies that are being used to expand the donor pool in living kidney donor programs.
3. Describe the Organ Donor Assessment Questionnaire (ODAQ) used for evaluating education in organ donation.
4. Provide one example of the benefits of paired kidney donation.
5. Discuss two potential solutions for highly sensitized patients.

Speaker #1 Keynote Speaker

[] Local speaker [] Traveling speaker [] Int'l speaker [] Board Member

Time:

Title of talk:

Speaker: (Include name, credentials, institution, address, contact numbers)

Three outcomes specific to this presentation:

- 1.
- 2.
- 3.

Two scientific references specific to this presentation:

1.

2.

CV/Resume

[1CV secured and sent along with this page.

Speaker #2

[] *Local speaker* [] *Traveling speaker* [] *Int'l speaker* [] *Board Member*

Time:

Title of talk:

Speaker: (Include name, credentials, institution, address, contact numbers)

Three outcomes specific to this presentation:

1.

2.

3.

Two scientific references specific to this presentation:

1.

2.

CV/Resume

[] CV secured and sent along with this page.

Continue with all speakers for symposium

Your workshop planning is incomplete unless you can secure all of the required information from your speakers. The information is used for the brochure and for CEU applications.

Example of Symposium Schedule

Time: 7:15 – 8:00	Registration Room:	Continental Breakfast Room:	Exhibits Room:
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0800 – 08:30	Welcome and Introductions Room:
08:30 – 09:30	(Keynote) Speaker # 1:

09:30 – 10:00	BREAK and Exhibits: Room:
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10:00 – 10:30	Speaker # 2
10:30 – 11:30	Speaker # 3
11:30 – 12:00	Speaker # 4

12:00 – 13:30	LUNCH: Room: Exhibits Room:
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13:30 – 14:00	Speaker # 5
14:00 – 14:30	Speaker # 6
14:30 – 15:00	Speaker # 7

15:00 – 15:30	BREAK and Exhibits: Room:
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15:30 – 16:00	Speaker # 8
16:00 – 16:30	Wrap-up, Evaluations and CEU Distribution

APPENDIX C

Event Profile

Most hotels or conference facilities are happy to provide a free estimate for a possible seminar.

The catering or sales contact will need the following information:

Hotel/Conference Facility	
Possible date(s) for event	
Number of attendees	
Style of room set-up (Classroom, U shaped)	
Time of event (Set-up/tear-down)	

Food and beverage requirements	
AV needs (Screens, podiums, projectors, etc.)	
Room set-up needs (Tables, exhibits, break-outs, etc.)	
Hotel accommodations needed	

APPENDIX D

Conference Brochure

<ul style="list-style-type: none"> • Chapter Name 	
<ul style="list-style-type: none"> • Title of Conference 	
<ul style="list-style-type: none"> • List of topics 	
<ul style="list-style-type: none"> • Program overview 	

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<ul style="list-style-type: none">• Program outcomes	
<ul style="list-style-type: none">• City, state, facility, address, map	
<ul style="list-style-type: none">• Day, date, time, schedule of presentations	
<ul style="list-style-type: none">• Planning committee members	
<ul style="list-style-type: none">• Registration form to mail or fax	
<ul style="list-style-type: none">• Registration fee	
<ul style="list-style-type: none">• Refund policy	
<ul style="list-style-type: none">• Hotel accommodation information	
<ul style="list-style-type: none">• Contact phone number and Email	

<ul style="list-style-type: none">• Accreditation	
<ul style="list-style-type: none">• RSVP deadline and late fee (if applicable)	