



Education Meeting Outline

- Section 1: Theme and Topics:
Create a vision (theme) & preliminary program ideas. A committee should be established to set the following items: event date, location, length of program, list of sponsors, list of speakers, list of volunteers, budget (speaker expense, facility expense, printing and/or postage expense, program booklet expense, and miscellaneous expenses), sponsor amounts (booths, breakfast, lunch). These items should be started 6 to 9 months prior to the event date.
- Section 2: See Meeting Planning 101 (pdf)
- Section 3: Vender Info:
What companies will you ask to display their products and info along with the address and phone numbers of company representatives. This list should be completed 6 months prior to the event date. Use members to get info on company representatives. Calling company representatives to purchase sponsorships should be done 5 months prior to the event date. A letter of explanation should then be developed and sent to the companies detailing charges for each sponsorship and when charges are due (see attached letter). This letter should be sent after phone call 4 to 5 months prior to the event date. A follow up call to the companies should be done as needed.
Go outside the norm when compiling your list of sponsors. Ask accountants, cell phone representatives, and banks to be sponsors of your expo. This gives your attendees more variety and new vendors to visit.
- Section 4: Speaker Info:
Who do you want to speak and on what topic. The topic of each presentation is determined by the theme chosen by the committee. The committee determines how long the presentation will be and in what timeslot. The speakers should be contacted by phone as soon as the theme is chosen. A letter should be drafted to give guidelines to the speakers on the chosen topic and how much time is allowed for the presentation. The letter should be sent to the speakers 4 months prior to the event date.

Section 5:

CE Filing:

Who will be in charge of submitting Expo agenda, developing registration form and satisfaction survey. The education director should be in charge of this area. The expo committee will develop the program schedule 4 to 5 months prior to the event date. Once the program is finalized, the education director will complete proper CE forms and submit them with fees to the department of insurance. This must be done 2 months prior to the event date. Registration forms can be used as CE forms. Information needed will be name, social security number, office phone number and an area for the attendee's signature. Make sure to contact your department of insurance for CE approval and compliance procedures. The survey forms should give the attendees the opportunity to critic your expo. The questions should rate the quality of the facility, location of the facility, speakers and their presentations, food, layout of the room or rooms, and the registration area. The answers to the survey questions are analyzed after the expo. The registration and survey forms should be developed by the education director 2 months prior to the event date.

Section 6:

Awards:

What criteria will be used and how many awards will be given? This is determined by the association president and the expo committee. Awards are usually given to the person and insurance company of the year for that chapter. Criteria used can be number of meetings attended, amount of goodwill toward the industry, amount of financial support of the chapter, and years of service.