



ONE HFMA EVENTS SUPPORT

hfma™



OVERVIEW:

1. Project Background and Scope Support
2. Submission Timelines
3. Best Practices for Submissions
4. Roles and Responsibilities Breakdown

PROJECT BACKGROUND & SCOPE

What is One HFMA?

What is included?

- **Chapter/Region Webinars:** Spanning 60-90 minutes
- **Webinar Series:** Session spanning 60-90 minutes over several consecutive weeks
- **Digital Events:** Multiple sessions spanning over 90 minutes
- **Networking Events:** Not attached to an education event
- **In-Person Education Events:** Half-day, single day, or multi-day events
- **Annual Sponsorship:** Allow organizations to confirm their sponsorship level
- **Event Sponsorship & Exhibit :**Event sponsorship opportunity sign-up, exhibit table purchases, exhibit booth location selection.

EVENT/SPONSORSHIP REQUEST

SUBMISSION TIMELINES

Event Request Submission Timelines

- **Chapter/Region Webinars, Webinar Series, & Virtual or In-Person Networking Events:** At least 45 days in advance of event date(s).
- **Digital Conferences:** At least 60 days in advance of event date(s).
- **In-Person or Hybrid Meetings/Conferences**
 - **Save the Date:** At least 120 days in advance of event date(s).
 - **Registration Open:** 8-10 weeks in advance of event date(s).
- **Event Sponsorship & Exhibit Creation:** Submit with your event details.
- **Annual Sponsorship Creation:** At least 30 days before you plan to issue renewal notices.

Once the Event Request Form is submitted, a Member/Volunteer experience team member will be in touch with a status update within 5-7 business days. To be equitable to all Chapters/Regions, the team sets up events in order of submission, regardless of event date.



BEST PRACTICES FOR EVENT SUBMISSIONS

Preparing to Submit

Share as many details as possible with the One HFMA Team at the start, which might include:

- Referencing details from a previous event (website pages to include, registration fees, cancellation policy, discount codes)
- If your committee uses Excel or Word to track your agenda, you can upload this information to the Event Request Form.

Preparing to Submit

Don't have all the details figured out? That's okay! Below are the minimum details needed get registration set up & open:

- Date
- Location
- If there are any custom questions you wish to collect during registration
- Registration fees
- Cancellation/refund policy
- Check payment address (if applicable)

*Agenda outlines, session descriptions & speaker information
can be submitted later!*

Preparing to Submit

- **Ask Questions:** Do you have an event you want set up that will have unique qualifiers for the registration process? Our team is always happy to get on a call and talk through any questions you might have and brainstorm ways to achieve your events registration process goals.
- **Trust the Process:** We are always learning and may know a new way to set up an event to better streamline the registration experience

Event Review

- **Review Event Website & Test Registration Process:** Please make sure to fully review the registration process, in particular a few areas that are difficult to make changes to once an event opens and fees are collected:
 - Registration Types
 - Fees
- **Provide approval to open event:** We do not open registration or publish the event calendar until we receive written approval from the Chapter/Region.

Submitting Event Updates

Make sure the email you send with the updates includes:

- Name of the Chapter/Region
- Name of the event that requires the update
- Event dates
- Specific information that needs to be updated

ROLES & RESPONSIBILITIES

BREAKDOWN

Chapter/Region: Webinars & Digital Events

- **Event Management**

- Put together agenda
- Speaker outreach & logistics (collect bios, photos, presentations)
- Event/session marketing (beyond Invitation email)

- **Submit Event Request Form to One HFMA** with registration, agenda, speaker, CPE details*

- Test registration process and provide approval to open registration to One HFMA
- Provide agenda/speaker/communication updates, as needed
- Act as main point of contact for any attendee questions

- **Webinar/Digital Event Logistics**

- Send speaker emails
- Confirm Chapter representative that will act as moderator for webinar/digital event
- Confirm Event Reminder/Certificate of Attendance/CPE Details
- Send poll questions to One HFMA in advance of event

- **Day Of Management**

- Prepare housekeeping announcements/script
- Prepare sponsor slide (if applicable)
- Join webinar 15-minutes prior to start time for technology check
- Manage chat box, Q&A and polling during webinar/digital event

- **Post Event**

- Submit speaker presentations to post on Chapter website (if needed)

One HFMA: Webinars & Digital Events

- **Use details submitted in the Event Form to set up**

- **Event**

- Registration process (questions, fees, discount codes, payment options)
 - Agenda & Speakers
 - Enter Zoom details
 - Set up CPE credits/CPE certificate (as needed)
 - Set up Feedback Survey
 - Marketing Support
 - Canva design (for social media)
 - Email communications – Save the Date, Invitation, Registration Confirmation, Event Reminder
 - Event website updates

- **Update event details, as needed**

- **Zoom Support**

- Set up details in Zoom
 - Issue calendar invite to speakers and Chapter/Region representative with unique login information
 - Enter poll questions
 - Join Zoom 15-minutes before event for technology check

- **Post Event**

- Upload recording(s) to YouTube
 - Pull Zoom participation reports for Chapter/Region records
 - Mark participation (as requested)
 - Issue Feedback Survey & CPE certificates/Certificates of Attendance

- **Additional Support**

- Issue 'balance due' notifications to attendees who have not paid
 - Issue refunds
 - Mark attendees as paid once a check is received



Chapter/Region: In-Person Events

• Venue Management

- Contracting*
- Communications & Logistics (food & beverage, audio visual, room set up)

• Conference Management

- Put together agenda
- Speaker outreach & logistics (collect bios, photos, presentations)
- Marketing event (beyond Invitation email)

• Submit Event Request Form to One HFMA with registration, agenda, speaker, CPE details**

- Test registration process and provide approval to open registration to One HFMA
- Provide agenda/speaker/communication updates, as needed
- Provide Know Before You Go communication verbiage
- Act as main point of contact for any attendee questions

• Sponsor Management

- Communicate with annual sponsors on any event-related benefits
- Manage event sponsorship and exhibit logistics

• On-Site Management

- Order supplies (name badges, name badge ribbons, signage, sponsored items, etc.)
- Print and organize name badges
- Event scripting

• Post Event

- Email attendance/session sign-in sheets to One HFMA (if needed)
- Submit speaker presentations to post on Chapter website (if needed)

One HFMA: In-Person Events

- **Review venue/speaker contracts (as requested)**
- **Use details submitted in the Event Form to set up Cvent**
 - Registration process (questions, fees, discount codes, payment options)
 - Agenda & Speakers
 - Venue details (in-person)
 - Set up CPE credits/CPE certificate (as needed)
 - Set up Feedback Survey
 - Marketing Support
 - Canva design (for social media)
 - Email communications – Save the Date, Invitation, Registration Confirmation, Event Reminder
 - Event website updates
- **Update event details, as needed**
- **Additional Support Offered**
 - Set up name badge template (as requested)
 - Set up OnArrival settings
 - Issue 'balance due' notifications to attendees who have not paid
 - Issue refunds
 - Mark attendees as paid once a check is received
- **Post Event**
 - Mark participation (as requested)
 - Issue Feedback Survey
 - Issue CPE certificates/Certificates of Attendance

hfma[™]



hfma.org