

# INTERMOUNTAIN STATES SEMINAR

# GREEN BOOK





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## Intermountain States Seminar

The idea of establishing an Intermountain States Seminar originated with the Utah Society for Medical Technology in 1962. Idaho joined Utah in promoting this idea and offered to act as the first host state.

Jackson Hole, Wyoming was proposed as the meeting site if Wyoming would join forces. Not only did Wyoming agree, but Montana also wanted to participate in the venture. All four states realized a combined seminar would provide noted speakers, quality workshops, and active participation. Colorado joined the Intermountain States Seminar as the fifth state in 1970.

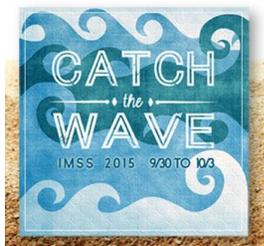
The first seminar was held in May of 1964. Subsequent meetings have been held in September. The five states developed a rotation for hosting the annual convention as follows: Idaho, Utah, Colorado, Wyoming, and Montana.

In 1967, a Coordinating Committee was established to assist in planning and to provide continuity to the Seminar. The Coordinating Committee was comprised of two members from each of the five states serving terms of five years. An exhibitor liaison from each state was also a member of this committee. The Planning Committee from the host state organized the many aspects of the seminar.

Baxter Scientific Products established the "IMSS Medical Technologist (Clinical Laboratory Scientist) of the Year" award in 1966. Each participating state submits a nominee for this award.

The success of the seminar is an excellent example of medical laboratory personnel working together to better their profession.

In 2013, the decision was made to have ASCLS Region VIII become the official sponsor and host of future Intermountain State Seminars. A joint Seminar was held in 2014 with the Coordinating Committee and Region VIII hosting, and for the first time in 2015, IMSS was hosted by ASCLS Region VIII, with a rotation schedule developed to have Planning Committee Chairs from all 5 states participate in planning the meeting.





## **PLANNING COMMITTEE**

### **Composition**

1. The IMSS Planning Committee reports to the Region VIII Council.
2. This Committee consists of the General Chair of the Seminar, and the chairs of the following Committees: Program, Publicity, Registration, Social, Awards, Exhibits, P.A.C.E., Finance, and Sponsorship. Silent Auction Coordinator falls under the Sponsorship Committee but may be a different person than the Sponsorship Chair. The Planning Committee can request that an ad hoc committee, if needed, be approved by the Region VIII Council. If approved, the committee may be reimbursed for expenses according to these standing rules.
3. Standing Rules and Guidelines for the operation of each Standing Committee follow.
4. Each Committee chair is to submit a final summary report within 2 weeks of the close of the Seminar to the General Chair.
5. The General Chair will hold a wrap-up meeting within 30 days following the seminar.

### **General Duties**

1. The Planning Committee will meet at least monthly beginning no later than January prior to the conference. All committee members are expected to attend the meetings; if unable to attend, the General Chair will be notified and a written report submitted.
2. Planning Committee chairs should submit regular written reports of their activities, questions, and concerns to the General Chair to be discussed at monthly meetings
3. Final reports for each committee from the previous conference will be reviewed by the incoming chair for that committee
4. At the initial planning committee meetings, committee members will:
  - a. Initiate work on the theme and logo for the conference.
  - b. review registration costs for both attendees and exhibitors and submit any proposed changes to the Region VIII Council for approval.
  - c. review the program grid and make any desired changes, setting the schedule for the meeting to include educational sessions, exhibitor sessions, and social activities
  - d. review signed contract with conference facility; paying attention to room block, required minimum spending for catering, important dates (e.g., room block closure), upfront fees, etc.
5. Planning committee members will be expected to help in all areas during the conference:
  - a. Registration table coverage
  - b. Posting signage
  - c. AV help with the speakers
  - d. Moderating sessions
  - e. Silent Auction help
  - f. Social functions such as monitoring food and drink during functions, liaising with hotel staff as needed
  - g. Exhibit hall as needed
  - h. Any area that appears to need assistance



6. Planning committee Chairs work together on many functions, for example:
  - a. Publicity Chair works with all committee chairs to get needed information for publications, including regular posts on websites and social media
  - b. Program Chair works with exhibits and sponsorship to get speakers and sponsors for the speakers; Program works with Registration to determine room assignments for breakout sessions; Program helps PACE with moderator assignments.
  - c. P.A.C.E. Coordinator works closely with the Program, Publicity, and Registration Chairs
  - d. Sponsorship Chair works with all committee chairs to determine areas of need, and sources of potential sponsors
  - e. Social chair coordinates with Publicity, Exhibit and Sponsorship to make sure sponsored Social events or (breaks, brunch, breakfast or lunch) have a table placard showing sponsor
  - f. Registration coordinates with sponsorship to obtain registration bag materials. Registration works closely with General, Social and Programs sharing information regarding dietary requests, session attendance numbers, ADA requests, moderator volunteers and any other specific information from registrations. Registration coordinates with all planning committee members setting schedule for registration table with a communication board and obtaining important information to email to all registrants
7. Planning Committee should employ the use of a messaging app to connect all planning committee members during the conference and quickly obtain help where needed
8. Planning Committee should coordinate with Region VIII Leadership Academy Coordinator for condo needs and any other needs during IMSS

**Decisions that must be approved by Region VIII Council:**

1. Changes in registration fees for attendees and exhibitors
2. Refund policy for both attendees and exhibitors
3. Silent Auction Charity
4. Any major alteration to the normal conference setup
5. Changes to the Intermountain States Exhibitors' Standing Rules

**Limits**

1. Reimbursement guidelines for IMSS Planning Committee are as follows:
  - a. 1/2 night's lodging up to current contract rate at Snow King if not staying in a planning committee condo. All reimbursement will be based on actual expenses, with receipt submitted
  - b. Lodging is comped if staying in the planning committee condo. Planning committee member must confirm intention to stay in the condo no less than 1 month prior to the conference and will not be reimbursed lodging if committee member chooses to change lodging to the hotel.
  - c. Registration fees: one complimentary registration per Committee chair and Silent Auction Chair, if separate from Sponsorship. If there are co-chairs, one registration can be split between the co-chairs. Additional fees such as the Social fee are up to the committee member to pay if they wish to participate.
  - d. All Honorary Past Coordinating Committee members (Debbie Shell, Sandy Fiscus, Meg Stark) shall receive complimentary general registration provided they pre-register



## **GENERAL CHAIR**

The General Chair Coordinates the planning and production of the entire Seminar with the aid and approval of the Region VIII Council

### **Schedule of Planning Activities:**

Conduct monthly planning meetings; prepare agenda and send reminders prior to each meeting

#### **Fall**

1. Work with Region VIII Director, Region VIII Treasurer, and Exhibits Chair to secure contract for the venue ideally, two years in advance.
2. Work with Region VIII Director and State Presidents to identify committee chairs (if vacant), create contact list to include all planning committee members and verify receipt of communications
3. Review final reports from the previous year's planning committee prior to beginning planning the next conference. Final reports for each committee will be reviewed by the incoming chair for that committee.

#### **Winter**

1. Set the schedule for monthly planning committee meetings using video conferencing and add meeting times to the Region VIII shared calendar. More meetings may be necessary as the conference gets closer.
2. Work with the committee in determining the theme and logo of the conference at the first meeting.
3. Delegate minutes recorder and make sure minutes are distributed within 14 days post planning meetings.
4. Work with committee chairs to review timeline and ensure deadlines are met.

#### **Spring**

1. Communicate with Region VIII Leadership Academy Coordinator for condo needs
2. Communicate regularly with committee chairs, troubleshooting problems as needed.
3. Work with the Finance Chair and appropriate planning committee chair to review and sign all the contractual agreements with the Seminar venue, other facilities and restaurants.
4. Serve as liaison between the planning committee and the venue to ensure needs are met for the conference.

#### **Summer**

1. Communicate regularly with committee chairs, troubleshooting problems as needed
2. Monitor website and social media posts to ensure information is getting posted
3. Delegate National meeting attendee to announce IMSS at the House of Delegates in June



4. Communicate with Publicity to ensure Program booklet is on schedule; review book for completeness and accuracy prior to printing
5. Review EZ Register for completeness and accuracy prior to publication
6. Confirm planning committee lodging (condo or conference hotel) prior to room block closing. Room block usually closes 30 days prior to the beginning of the conference.
7. Communicate with conference hotel regularly to receive updates on room block. Work with Program chair to ensure speakers have obtained lodging.

**Fall**

1. Work with the venue to ensure adequate security for the exhibits. Exhibits must be in a room which can be secured. Adequate control must be provided for every unlocked door, to assure that only persons authorized for that time period are admitted.
2. Work with venue to secure 'working/storage' room where conference items can be securely stored
3. Oversee Registration, Social, Exhibits, Publicity, Programs, PACE, and provide help where needed
4. Work with venue to troubleshoot issues that arise
5. Prior to leaving the event, reconcile final invoices with input from appropriate planning committee chairs.
6. Instruct the Planning Committee chairs that a detailed final report is to be presented to the General Chair within 2 weeks of the close of the meeting. All reports will be saved in the appropriate folder in the cloud sharing platform
7. Within 30 days after the conference, schedule a final meeting with all planning members to review final reports and compose general thoughts about the meeting
8. Prepare a final report for the Region VIII Council following the conference
9. Ensure that all those who contribute to the success of the Seminar are sent a "Thank You" note.

General Chair:	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov
Secure facility and get contract information (2 years ahead)												X	
Review planning committee final reports from previous year's seminar	X	X											
Schedule monthly Zoom meeting times for the year		X	X										
Add meetings to Zoom calendar		X	X										
Work with RD and state Presidents to identify committee chairs	X	X											
Create contact group and verify communication with all planning committee members		X	X										
Decide on Theme and logo		X	X										



Plan and conduct planning meetings at least monthly		X	X	X	X	X	X	X	X	X	X			
Ensure meeting minutes are recorded and dispersed to committee members in a timely manner		X	X	X	X	X	X	X	X	X	X			
Communicate with committee chairs on a regular basis to keep everyone on track		X	X	X	X	X	X	X	X	X	X			
Communicate with R8LA Coordinator for condo needs				X	X	X								
With Finance Chair, work with planning chair to sign contracts						X	X	X	X					
Monitor website and social media posts					X	X	X	X	X	X	X			
Delegate National meeting attendee to promote IMSS								X						
Review Program book prior to print								X	X	X				
Review EZ Register prior to publishing								X	X	X				
Confirm planning committee lodging prior to close of room block										X				
Obtain updated listing of reservations from hotel to monitor room block										X	X			
Oversee all areas of conference and provide (assign) help where needed													X	
Work with venue to troubleshoot issues during the conference													X	
Work with venue to ensure security for exhibits and 'storage' room													X	
Reconcile invoices													X	
Report to Region VIII Council					X			X					X	
Charge committee chairs with writing final reports													X	
Conduct wrap-up meeting within 30 days post seminar													X	X
Compile final reports to share with Region VIII Council													X	X
<b>General Chair</b>	<b>Nov</b>	<b>Dec</b>	<b>Jan</b>	<b>Feb</b>	<b>Mar</b>	<b>Apr</b>	<b>May</b>	<b>Jun</b>	<b>Jul</b>	<b>Aug</b>	<b>Sep</b>	<b>Oct</b>	<b>Nov</b>	



## **EXHIBITS CHAIR**

The Exhibits Chair coordinates the vendor activities for IMSS

### **Schedule of Planning Activities:**

Attend monthly planning meetings; submit report of activities to General Chair prior to each meeting

#### **Winter**

1. Review final report from previous year's Exhibits Chair
2. Review and become familiar with IMSS Rules for Exhibiting
3. Work with Region VIII Director, Region VIII Treasurer, and General Chair to secure contract for the venue ideally, two years in advance.
4. With the planning committee, propose the registration fees for exhibits **with any changes to fees submitted to the Region VIII Council for approval.**
5. Send electronic Save-the-Date to potential exhibitors
6. Work with Program Chair and Planning Committee to determine exhibitor hours
7. Draft initial letter and send electronically to potential exhibitors, supplying them with information about the meeting including theme and logo
8. Build registration site on EZ Register, open the site by March and send to the Webmaster to publish the link on IMSS website.

#### **Spring**

1. Communicate with exhibitors who have not committed with reminders about the meeting
2. Communicate with committed exhibitors with any indicated updates
3. Monitor EZ Register, respond to questions from exhibitors
4. Deposit or forward paper checks as received (paper checks go to IMSS Finance Chair/Region VIII Treasurer)
5. Create excel spreadsheet with specific exhibitor information including both paper and EZ Register registrants. See example in Box

#### **Summer**

1. Map out vendor hall paying attention to specific requests from exhibitors. Begin developing a draft floor plan for table arrangement.
2. Send another letter of invitation to uncommitted exhibitors
3. Contact Snow King for shipping information
4. Send informational letter to committed exhibitors with details regarding shipping address, exhibitor hours, Silent Auction, etc.
5. Work with Planning Committee to develop Vendor Game and coordinate with exhibitors, if applicable.



6. Work with Planning Committee to develop Vendor Quiz and coordinate with exhibitors, if applicable
7. Design a vendor evaluation to obtain feedback from the exhibitors about their experiences and any suggestions for improvements. Can include a question about interest for speaker sponsorship for next year's meeting.

**Fall**

1. Finalize floor plan for exhibit hall
2. Send registration deadline reminder to unregistered exhibitors
3. Work with Snow King on vendor hall needs such as tables, tablecloths, electrical outlets, layout, etc.
4. Give list of exhibitors to Registration Chair for exhibitor badges
5. Give list of exhibitors to Publicity Chair for Thank You poster in the vendor hall
6. Write "Thank You" notes to each Exhibitor to include in the packet they receive at the meeting
7. Assemble packet for each Exhibitor, one packet per booth. Packets include:
  - a. Rules for Exhibiting at IMSS
  - b. Program Booklet
  - c. Final Evaluation
  - d. Thank-you note
  - e. Silent Auction instructions
  - f. Vendor CE quiz information
  - g. Vendor game materials
8. Be available at all times during set up and exhibit hours or identify a designee to help the exhibitors set up and to answer their questions
9. Following the Seminar, email the exhibitor with an electronic Thank You and include a list of the current year's registrants
10. Prepare a final report for the IMSS General Chair following the meeting
11. Attend wrap-up meeting

Exhibits	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov
Review final report from previous year's chair	X	X	X										
Attend monthly meetings and submit brief report each meeting			X	X	X	X	X	X	X	X	X	X	
Review Exhibitor rules		X											
Send Save the Date email			X	X									
Determine registration fees			X										
With Programs, determine exhibitor hours			X										



Letters to Exhibitors			X	X	X		X		X		X		
Reminder to Exhibitors						X		X		X	X		
Build EZ Register				X	X								
Open EZ Register					X								
List of exhibitors to publicity and webmaster							X	X					
Create excel spreadsheet for tracking							X	X					
Deposit or forward checks as received							X	X	X	X	X		
Map vendor hall										X	X		
Help develop vendor game and/or quiz									X	X	X		
Develop vendor survey										X			
Send exhibitor names to Registration Chair											X		
Write Thank you notes											X		
Meet with General Chair, Finance Chair and RD to secure venue for following year(s)												X	
Assemble and distribute vendor packet												X	
Distribute Save-the-Date cards												X	
Exhibitor booth needs met												X	
Monitor vendor hall or assign someone to monitor												X	
Assist with vendor game												X	
Send electronic thank-yous and list of registrants												X	X
Final Report to General Chair												X	X
Attend wrap-up meeting												X	X
<b>Exhibits</b>	<b>Nov</b>	<b>Dec</b>	<b>Jan</b>	<b>Feb</b>	<b>Mar</b>	<b>Apr</b>	<b>May</b>	<b>Jun</b>	<b>Jul</b>	<b>Aug</b>	<b>Sep</b>	<b>Oct</b>	<b>Nov</b>



## **PROGRAM CHAIR**

The Program Chair coordinates the educational program activities for IMSS

### **Schedule of Planning Activities:**

Attend monthly planning meetings; submit report of activities to General Chair prior to each meeting

#### **Winter**

9. Review final report from previous year's Program Chair
10. Review final evaluations from previous year's IMSS attendees, noting any comments pertaining to educational sessions
11. Coordinating with P.A.C.E. Coordinator, review final speaker evaluations
12. Plan and arrange the morning and afternoon lectures and workshops. Determine time schedule for program including exhibitor hours
13. Contact potential speakers and work with confirmed speakers to establish date and time of session, keeping potential conflicts to a minimum, such as 2 microbiology sessions at the same time; an example of a letter requesting a speaker is in Box under IMSS in the Green Book Folder – Program Chair Folder, subfolder Forms and Templates
14. Keep a list of contacts to share with the next Program chair
15. Review the documents in Box folder, *IMSS Speaker.Topics.2012 to present*, under IMSS. This is a composite listing of speakers, topics, sponsors, and conference themes from 2012 to the present. This helps reduce the number of repeat sessions/topics in a short period of time.
16. Update the Speaker Agreement form for the current year, editing dates, theme and logo as indicated. Work with the P.A.C.E. Chair to determine desired return date for all forms.

#### **Spring**

1. Send Speaker Agreement form and P.A.C.E. Program and Speaker information form (also updated for the current year) to each speaker as they are confirmed. The speaker agreement form template is in Box under IMSS in the Green Book Folder – Program Chair folder, subfolder Forms and Templates. The P.A.C.E. form is provided by the P.A.C.E. Coordinator.
2. Serve as point of contact for conference speakers. Communicate on a regular basis with speakers with updated conference details. Examples of spring letters to speakers with session information is located in the Forms and Templates subfolder of Program Chair in Box.
3. Arrange for SA meetings, identifying subject areas and facilitators

#### **Summer**

1. Communicate on a regular basis with speakers with updated conference details.
2. Update *IMSS Speaker.Topics.2012 to present* in Box primary IMSS folder with the listing of speakers, topics, sponsors, and conference theme for the current year.



3. Work with Registration and General Chairs to assign meeting rooms and make all arrangements for audio-visual equipment that may be needed by speakers and workshop personnel.
4. Arrange for speaker gifts for all speakers
5. Work with Speakers to obtain lodging, sending lodging information when available

**Fall**

1. Work with P.A.C.E. Coordinator and Registration to arrange for the moderators for all sessions and workshops.
2. Serve as speaker liaison during the conference, helping with any issues
3. Write "Thank You" notes to all speakers and workshop personnel.
4. Prepare a final report for the Planning Committee following the seminar.
5. Attend wrap-up meeting.

**Time Frames**

1. Initial letters to prospective speakers shall be sent in early December and no later than Jan 31<sup>st</sup>
2. After speaker acceptance, a follow up letter should be sent confirming date and time of session and including Speaker Agreement and P.A.C.E. Program and Speaker information forms with expected "return by" date.
3. Mid-spring, a letter should be sent including session details and lodging information.
4. Approximately 1-2 months prior to the conference, a letter should be sent to finalize the arrangements, length of stay, how speakers are arriving, if they will attend the social functions, handout deadlines, and any further needs such as AV needs.
5. The program of speakers and workshops must be in the hands of the publicity chair by the following deadlines:

March 15 <sup>th</sup>	Tentative Program	Flier for State Meetings
Monthly, April-June	Program updates and teasers	Electronic postings of updates and teasers
June 15 <sup>th</sup>	Final Program	Pre-registration materials; small program mailer if using
August 15 <sup>th</sup>	Complete	Conference Program (including times, places, notes about speakers, etc.)

**Limits**

1. The number of workshops will be limited to twenty-eight (28), with an emphasis on quality speakers and content. Approval from the Region VIII Council is required for any additional workshops (beyond 28).
2. If a company wishes to sponsor a speaker or workshop, they must be informed that the presentation cannot be commercial.
3. Multiple speakers and any non-routine arrangements must be brought before the Planning Committee for approval.



4. Speakers and workshop personnel will only be reimbursed for least expensive travel (current IRS reimbursement rate for mileage or reimbursement for gas receipts), lowest airfare, lodging for one more night than days speaking at the conference hotel. If requested, a maximum \$30 per diem for two travel days plus the day(s) the speaker is presenting is available. Registration is complimentary. No bar, telephone or room service bills will be paid. Receipts for travel and lodging expenses must be submitted to the IMSS Finance Chair.
5. Speakers will be paid expenses regardless of ASCLS membership. A person receiving reimbursement from the seminar as a speaker may not receive reimbursement from the seminar in another capacity.
6. Aim for a good mix of industry-sponsored speakers and non-industry-sponsored speakers. A program should not be more than 50-60% industry sponsored. It's important to have these speakers to help with costs but they tend to present the same 'canned' sessions year after year and even though they are requested to keep the 'commercial' out of their presentations, they still get it in. Look for speakers sponsored by regional laboratories, medical centers, educational institutions, for example.
7. Expenses for non-industry-sponsored speakers who are not associated with regional labs, medical centers, educational institutions will more than likely fall on the IMSS budget. It helps to work with sponsorship to request sponsors but it's very difficult to obtain. It's important to have some 'big names' since this is regional; a rule of thumb is max 3 unsponsored at ~\$1500 each.
8. Speakers will be expected to provide electronic versions of handouts to the Program Chair no later than 2 weeks prior to the seminar. IMSS will not provide printed copies of handouts.
9. IMSS is not a 501(c)3 entity. Speakers cannot donate expenses for a tax deduction.
10. Workshop fees are at least ten dollars (\$10) for members and double the amount for non-members, and may be bundled into the entire cost of registration.
11. The Program Chair works closely with the Publicity, Registration, and Sponsorship Chairs, P.A.C.E. Coordinator, and, if having company sponsored speakers and/or workshops, the Exhibits Chair on the Planning Committee.
12. Value of speaker gifts must not exceed \$30.00.

Program:	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov
Review final report from previous year's chair	X	X	X										
Attend monthly meetings and submit brief report each meeting			X	X	X	X	X	X	X	X	X	X	
Determine Program Grid		X	X										
Review <i>IMSS Speaker Topics 2012 to present</i>		X	X										
Coordinate presentation times with social and exhibits		X	X										
Update speaker agreement form			X	X									



Obtain updated PACE form from PACE Chair			X	X									
Contact and confirm potential Speakers		X	X	X	X	X							
Confirm speaker information and send speaker forms			X	X	X								
Communicate with speakers as needed						X	X	X	X	X	X		
Communicate session and room block details to speakers					X	X	X	X					
Arrange Scientific Assembly					X								
Program complete					X	X							
Tentative Program to Publicity chair					X	X							
PACE forms to PACE Chair; reminders to speakers to return forms						X	X	X					
Monthly updates to publicity chair for electronic postings					X	X	X	X	X	X	X		
Final program and speaker info to Publicity and PACE chairs							X	X					
Update <i>IMSS Speaker Topics 2012 to present</i> file									X	X			
Assign meeting rooms using Registration numbers											X	X	
Coordinate with General Chair for AV and other speaker needs										X	X	X	
Final letter to speakers										X	X		
Accommodation and Transportation for speakers											X		
Assist P.A.C.E. Chair, with moderator packets & assignments											X	X	
Buy speaker gifts										X	X	X	
Write Thank you notes to include with speaker gifts												X	
Serve as speaker liaison during conference												X	
Final Report to General Chair												X	X
Attend wrap-up meeting												X	X
<b>Program:</b>	<b>Nov</b>	<b>Dec</b>	<b>Jan</b>	<b>Feb</b>	<b>Mar</b>	<b>Apr</b>	<b>May</b>	<b>Jun</b>	<b>Jul</b>	<b>Aug</b>	<b>Sep</b>	<b>Oct</b>	<b>Nov</b>



## **P.A.C.E. COORDINATOR**

The P.A.C.E. Coordinator assigns P.A.C.E. continuing education to applicable educational activities at IMSS and coordinates P.A.C.E. activities at IMSS.

### **Schedule of Planning Activities:**

Attend monthly planning meetings; submit report of activities to General Chair prior to each meeting

### **Duties**

1. Review final report from previous year's P.A.C.E. Chair
2. Develop a P.A.C.E form that has all necessary information per the P.A.C.E manual but also contains the yearly logo and seminar dates.
3. Review each submission for content acceptability and working with the Program Chair, shall ensure all necessary speaker and workshop information is obtained.
4. Build the program on-line using CE Organizer, assigning program numbers and unique session codes for each session.
5. In coordination with Program Chair, communicate speaker and session information to Publicity Committee for inclusion in program booklet:
  - a. Session Title
  - b. Session Description
  - c. Level of Instruction
  - d. Session Objectives
  - e. Speaker name
  - f. Speaker bio (brief) and credentials
  - g. Sponsor if applicable
  - h. P.A.C.E. Provider statement (stating that ASCLS-(state) is an accredited provider)
6. Develop and print necessary materials for attendee packets including P.A.C.E. documentation form
7. In coordination with Program and Registration Chairs, identify moderators for each session and notify those individuals in advance with specific instructions.
8. Assemble Moderator Packets to include:
  - a. Roster Cover listing program start and end time, number of participants, and signature of moderator
  - b. Moderator instructions
  - c. Housekeeping items to share with attendees including use of CE Organizer
  - d. Speaker introduction
  - e. Unique session code to give at the end of the session
  - f. Speaker gift
  - g. Outside of packet shall be identified with session information and moderator's name
9. Collect all moderator packets and ensure completeness of packet at the end of each session
10. Attend wrap-up meeting



11. Include all P.A.C.E. approved sessions on quarterly report to P.A.C.E. national office.
12. Prepare a final report for the Planning Committee within 2 weeks following the seminar
13. Send summary of evaluations (located on CE organizer) to each speaker, and if indicated, sponsor

### Time Frames

1. P.A.C.E. Coordinator builds sessions in CE Organizer when Program is finalized (minor edits can be done if changes are made to the program)
2. Roster covers can be printed within one month of the meeting (when it appears there will be no more changes to the program).
3. Assemble Moderator envelopes two weeks prior to the meeting
4. Working with Registration, notify moderators one week prior to meeting with detailed information about the session they will be moderating including speaker introduction

### Limits

1. The P.A.C.E. Coordinator works closely with the Program, Publicity, and Registration Chairs
2. The P.A.C.E. Coordinator reviews speaker and program information for contact hour acceptability; sessions that are vendor specific must be reviewed for bias. If bias exists, P.A.C.E. credits cannot be assigned.

P.A.C.E.	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov
Review final report from previous year's chair		X	X										
Attend monthly meetings and submit brief report each meeting			X	X	X	X	X	X	X	X	X	X	
Work with Program Chair to coordinate speakers and distribute forms			X	X	X	X	X						
Finalize and approve all forms so Publicity can begin making booklet								X	X				
Load Session into CE Organizer										X	X	X	
Print PACE forms and create moderator packets											X		
Assign moderators											X	X	
Final report to General Chair												X	X
Attend wrap-up meeting												X	X
Evaluation Summaries to Speakers													X



## **PUBLICITY CHAIR**

The Publicity Chair coordinates the publicity activities for IMSS

### **Schedule of Planning Activities:**

Attend monthly planning meetings; submit report of activities to General Chair prior to each meeting

#### **Fall/Winter**

1. Review final report from previous year's Publicity Chair
2. Decide on theme and logo with the Planning Committee in December or January
3. Send or post "Save the Date" notices of the seminar in early January to the following:
  - Publications like MLO, Medical Lab Management
  - Websites for CLMA, ASCLS, and all of the websites of the 5 states in Region VIII with links to the IMSS web site: <http://asclsregion8.org/IMSS>.
  - Region VIII Member Community and the ASCLS Open Forum on the ASCLS website.
  - Social media sites.
  - Email blast to all Region VIII members, previous year's IMSS vendors and conference attendees
4. Maintain a list of the contact information of the publications and websites used to advertise the Seminar so it can be passed to the next Publicity Chair for the following year's meeting. The chair must include these email addresses in their final report.
5. Monitor and update the Intermountain States Seminar (IMSS) Facebook page with the link to the IMSS web site noted; coordinate with Region VIII/IMSS webmaster.
6. Design flyer with IMSS information to be completed by March 15<sup>th</sup>. Send the electronic file to the state presidents asking them to forward to their spring meeting organizer for distribution at the meeting and their state webmaster for immediate posting. Save a copy of the flyer in the cloud sharing platform.

#### **Spring**

1. Obtain electronic files of addresses from each state of members, hospitals and clinics
  - a. The Region VIII Director can access a mailing list for the current ASCLS members in the five states in Region VIII.
  - b. Design one sided flyer with updated information for electronic distribution to the states list-serves and posting on the IMSS web site and Facebook page. Post by June 1<sup>st</sup>.
  - c. Identify a state representative attending the ASCLS national meeting to distribute flyers and invite ASCLS members to attend IMSS during the House of Delegates.
2. Post to social media sites at least monthly starting in March. (Facebook page, connect community etc.)
3. Obtain updated Registration forms from Registration Chair (individual and facility registration forms) and verify that Registration chair contact information is correct on the forms.



## Summer

1. Compare prices for and choose a local printer and mailing service (many printers will do both)
2. Create, Print and distribute the following. Refer to the previous year's committee report for an estimate of the number of printed materials needed.
  - a. Print small conference mailer in July (if using) and send to Region VIII members, lab facilities in the 5 states, previous attendees and those who request them
  - b. If not using the small mailer in July, print large conference booklet in July/August and mail to Region VIII members at least 60 days prior to the meeting stressing that they bring the booklets with them to the conference; print about 70-75 extra copies to have at the conference
  - c. If using a small mailer in July, print the large conference booklet in September and bring them to the conference to distribute to all speakers, attendees, on-site registrants and 1 copy per vendor booth.
3. Continue to send electronic communications on websites and through the member community at least monthly. Include these updates:
  - the program
  - room block information
  - speaker and session highlights
  - social highlights
  - Silent Auction information.
  - Reminders to attendees to bring large conference booklet to the conference with them
  - Solicit any needed information from Planning Committee members needed for posting to the publicity chair and webmaster on a regular basis.
4. Send pdf of completed final Conference Booklet to the IMSS webmaster for posting on the website
5. If available, use a conference meeting app to keep communication current during the conference; conference attendees tend to use this more than they do a paper booklet.
6. Special Note Regarding Mailers:
  - a. Small Conference Mailer (Use of this small mailer will be determined by the Planning Committee):
    - i. Have ready to mail by July 15<sup>th</sup> or sooner
    - ii. Small size – 8 ½ x 11 paper folded in half to create a 'half-size' Program
    - iii. Registration form included in the mailer, folded in the center.
    - iv. Mail to Region VIII members, laboratory facilities in the Region and previous attendees
  - b. Large Conference Booklet:
    - i. If no small mailer, this should be mailed at least 60 days prior to the conference



- ii. If using a small mailer, this should be sent to the printer in time to have it ready 2 weeks prior to the conference dates (check with the printer for time needed to get it printed)
  - iii. Large size – 8 ½ x 11; consider using color for the cover and monochromatic for interior pages
  - iv. Must include speaker bios (and photos if available), session description, objectives and level of instruction for each session, P.A.C.E. credit(s), P.A.C.E. provider, exhibitor and sponsor listing, and ADA statement. Room assignments can be handled with the meeting app if using, or by printing a doc to add to registrant's bags at the time of the conference.
- c. It is suggested that these be monochromatic and sent by "First Class" Mail; bulk mail will often take too long to be processed.
7. Obtain the list of exhibiting companies from the Exhibit Chair, list of sponsors, MOY nominees, Planning Committee names, State President names, etc from the Planning Committee for inclusion in the program mailer. (Note: refer to previous year's program book for template of necessary information.)
  8. Assist Sponsorship Chair in obtaining materials (pens, note pads, etc.) for registration packets.

## Fall

1. Obtain an updated list of exhibiting companies from the Exhibit Chair for inclusion in the program mailer and for listing on large sign at the meeting
2. Prepare Save-the-Date notices for the following year's conference to distribute at this year's conference, e.g., one-page flyer, ½ or ¼ page flyer, or business card.
3. Work with the planning committee to create and prepare:
  - a. Signs (8x11) for Session rooms
  - b. Signs for the Silent Auction and for social functions including sponsored Companies' names on signs
  - c. Signs for Registration
  - d. Large signs listing all sponsors to be displayed in general areas
  - e. Any other signs needed in registration or exhibits area
4. Monitor and update signage as needed during the conference
5. Prepare final report, numbers printed and mailed, costs, dates etc., for the fall Planning Committee meeting
6. Give electronic publications list to next year's Publicity Chair
7. Document names of state representatives having administrative access to the Intermountain States Seminar (IMSS) Facebook Page
8. Attend wrap-up meeting

## Notes

Be sure to use the Publicity Chair's name and address on fliers, mailers and printed notices. Place all publicity materials (e.g., flyers) along with jpgs of logos in the cloud sharing platform  
A recap of publications:



Save the Date Business Card or Flier	September/October meeting 1 year prior to next meeting	Hand out business cards or fliers to Exhibitors and attendees at the meeting before the next. Hand out extra copies to a representative of each of the 5 states to handout to all MLS in the 5 states.
Save the Date Email Blast	Early January	Email blast to ASCLS Region VIII members, previous year's IMSS Vendors, and all IMSS Attendees.
Flier	March 15 <sup>th</sup>	Electronic copy saved in Box and distributed to state spring meeting chairs
Flier, updated	June 1st	Send to Region VIII members, hospitals, previous registrants electronically. Distribute hard copies at the ASCLS national meeting
Registration/Small size Program Mailer, if using	July 15 <sup>th</sup> or sooner If NOT using, mail final conference program (see below) no later than 60 days prior to the conference.	Small size, 8 ½ x 11 paper folded in half, Program and Registration forms Mailer sent to Region VIII members, lab facilities in the 5 states, previous attendees and those who request them. Suggestion: use monochromatic color scheme to keep costs down for mailer. Send using first-class mail.
Final conference program,	Send to printers ~ 2 weeks before conference dates. <b>NOTE:</b> IF NOT using small program mailer, have this mailed at least 60 days prior to conference Deliver programs to conference. Have enough for all speakers, attendees, on-site registrants and 1 copy per vendor booth.	large copy 8 ½ x 11", containing speaker bios, PACE info, session info, and up-to-date exhibitor list and sponsors, and ADA statement. Have extra Program mailers for speakers, exhibitors, and on-site registrants. Send electronic program, updates and registration forms to Website Chair for posting Suggestion: Monochromatic color scheme inside final program; full color for cover page. Send using first-class mail

Publicity	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov
Review final report from previous year's chair		X	X										
Attend monthly meetings and submit brief report each meeting			X	X	X	X	X	X	X	X	X	X	
Design logo-based on theme		X	X										
Send Save the Date notices to publications, websites, email groups, member community			X										
Maintain list of contacts for future needs		X	X	X	X	X	X	X	X	X			
Monitor Social media and websites; coordinate with webmasters			X	X	X	X	X	X	X	X	X		
Create Save the Date flyers and send link to state conference planning chairs to distribute at state spring meetings				X	X								



Request mailing list of members, hospitals and clinics								X						
Create updated Save the Date flyers with more specific details and post electronically to all members in the region								X	X					
Distribute flyers/information to lab facilities in Region VIII								X	X					
Identify someone attending National to invite members and distribute flyers at HOD								X	X					
Compare prices and choose printer and mailing service								X						
Send small Program booklet if using, including paper registration form to Region VIII members, lab facilities in the 5 states, previous attendees and those who request them.									X	X				
Print & mail final program										X	X			
Assist Sponsorship Chair in obtaining swag											X	X		
Make signs for sessions, sponsors, registration, exhibitors, social functions											X	X		
Print Save the Date cards or fliers												X		
Distribute Save the Date cards/fliers to vendors and participants at IMSS													X	
Final report to General chair													X	
Attend wrap-up meeting													X	X
<b>Publicity</b>	<b>Nov</b>	<b>Dec</b>	<b>Jan</b>	<b>Feb</b>	<b>Mar</b>	<b>Apr</b>	<b>May</b>	<b>Jun</b>	<b>Jul</b>	<b>Aug</b>	<b>Sep</b>	<b>Oct</b>	<b>Nov</b>	



## REGISTRATION CHAIR

The Registration Chair coordinates the registration activities for IMSS

### **Schedule of Planning Activities:**

Attend monthly planning meetings; submit report of activities to General Chair prior to each meeting

### **Winter**

17. Review final report from previous year's Registration Chair
18. With the planning committee, propose the registration fees **with any changes to fees submitted to the Region VIII Council for approval** (rule of thumb is member fees are 1/2 those of non-members, community member fees are 3/4 those of non-members, non-member phlebotomist fee equivalent to a student non-member fee, Emeritus Member fee equivalent to a student member fee, being very specific as to what those fees include).

### **Spring**

1. Update paper registration forms as needed, individual and facility forms
  - a. Include guest definition on the registration form (A guest is a friend or relative accompanying a paid registrant and not associated with the field of Clinical Laboratory Science or a representative of industry).
  - b. State that the check should be made payable to **IMSS (ASCLS Region VIII)** on paper registration form.
  - c. Develop discount codes for planning committee member registrations (full discount for Chairs or ½ discount for Co-chairs) and speaker registrations (full discount)
2. Obtain EZ Register user ID and password from previous registration chair. Log in to EZ Register and build the new event, copying the previous IMSS event and updating information. Include logo and theme in the build. Do not publish until all information is complete.
3. When EZ Register is ready to publish, send the link to the Publicity Chair and the Webmaster to post for registrants.
4. Include a section for special needs on both paper registration and EZ Register. This includes special dietary needs. "Special Needs/ADA: If you need special assistance, please contact (general chair and their contact information) as soon as possible but no later than (30 days prior to the start of the convention)."

### **Summer**

1. Publish EZ Register when the build is complete, and the planning committee is ready to open registration



2. Share EZ Register link with webmaster and Publicity Chair for posting on the IMSS website and communicating to members
3. Share paper registration forms with webmaster and Publicity chair
4. Monitor paper and on-line registrations for requests for special needs; if the registrant lists ADA special needs, make sure the general chair is aware of that request. If the registrant lists dietary needs, make sure the social chair gets the information as soon as possible.
5. After receiving paper registration forms in the mail, add the information to registration worksheet in cloud sharing platform. Forward the fees to IMSS Finance chair. At the close of the event, forward the EZ Register invoice to the IMSS Finance Chair
6. Send confirmation notices to all registrants, paper and on-line.
7. Send conference updates to all registrants as needed – e.g., password for handout access
8. Keep a running spreadsheet in cloud sharing platform showing registration information to include: attendee name and email, # of days attending, breakout session selection, special needs, social function attendance, scientific assembly attendance, moderator volunteer (and specific session if noted). Update this frequently, increasing frequency as the conference gets closer.
  - a. Keep a record of names of registrants attending each workshop for the program chair.
  - b. Keep a tally of the number of people registered for the banquet, lunches, and breakfasts along with any special dietary needs for the social chair.
  - c. Keep a record of moderator volunteers for Program and P.A.C.E. Chairs
9. Check supply of badges and ribbons and purchase any additional if necessary. Develop badge template for three categories: attendee, speaker, exhibitor. Ribbons can be used to denote planning committee members, and other categories decided by planning committee.
10. Check with the planning committee to see if a printer is available for use at the conference, if not the hotel might have a printer that we can access

## Fall

1. Continue to monitor EZ Register, adding totals to Cloud sharing platform on a regular basis. Make sure Program chair and Social chair also have access to the registration numbers
2. Alert General Chair to any ADA requests
3. Alert Social Chair to any dietary requests
4. Obtain current Region VIII membership roster from Region VIII Membership Chair or Regional Director
5. Send confirmation email to all registrants. Include information such as handout password, special instructions for the conference, Silent Auction donation reminders, social event reminders, etc.
6. Print name badges for all attendees, guests, speakers, and exhibitors. Obtain exhibitor list from Exhibits Chair and speaker list from Program Chair. Print tickets for all the food and social functions, workshops, etc. if using. Badges should have large type, include the registrant's workplace and state, and have different indicators for the various categories of attendees (e.g., different color paper for each category). Badges should also indicate selected breakout sessions on the reverse
7. Assemble the registration packets. Registration packets should include the P.A.C.E. instructions and documentation form, membership information and any other pertinent flyers. Coordinate with



Sponsorship Chair, Region VIII Membership chair, P.A.C.E. chair, Program Chair, Region VIII Leadership Academy Coordinator for packet materials.

8. Coordinate registration bag assembly at IMSS prior to opening day of the conference. Assemble all materials for the bags including registration packets, donated swag, any provided items such as small bottles of water, etc.
9. Set the registration hours at the Seminar and work the desk during those hours, assign volunteers from the planning committee to help with the registration desk.
10. Post registration hours and a phone number to contact if necessary
11. Organize registration desk to include area for registration activities including bag and badge distribution and on-site registrations. Keep a copy of confirmed registrations at the desk to mark off attendees as they register and write in on-site registrations. Confirm membership status for on-site registrants. Also, set up areas for Silent Auction information, moderator envelope distribution and return, and informational flyers.
12. Have a cash box, a means for processing on site registrations such as a Square (check with Finance Chair), laptop, printer (if available), receipt book, additional registration forms, membership forms, additional tickets (if using), pens, Silent Auction numbers and signup sheets, moderator envelopes, and a visually welcoming display at the registration table.
13. Make sure the cash box and Square are secure at all times, never leave them unattended anywhere at the conference.
14. Provide a means in the registration area for communicating messages, changes in the program, etc.
15. Work with Region VIII Membership Chair to facilitate membership promotion at the Seminar.
16. Prepare a final report for the General Chair of the Planning Committee following the close of the conference.
17. Attend wrap-up meeting
18. Within a week of the close of the seminar, provide the exhibits chair with a list of all registrants and their email, broken down by state, including place of employment, to be included with the "Thank You" letters to the Exhibitors.

## Limits

1. No refunds shall be made within fourteen (14) days of the Seminar without the approval of the Region VIII Council.
2. IMSS will pay a portion of the dues for Professional membership in ASCLS for those *three day* registrants who join at the Seminar, as determined by the Region VIII Council.
3. Registration chair will confirm registrant's member status using membership roster.
4. Ensure extra tickets, if using, and registration forms are available for on-site registrants.

Registration:	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov
Review final report from previous year's chair		X	X										



Attend monthly meetings and submit brief report each meeting			X	X	X	X	X	X	X	X	X	X		
Review and propose registration fee changes if any		X	X											
Revise & print registration forms & submit to publicity chair			X	X										
Build event in EZ Register							X	X						
Send link to EZ Register to Publicity chair and Webmaster when published								X						
Create registrant template									X					
Monitor EZ Register and paper registrations saving tallies on registrant template in Cloud sharing platform folder											X	X	X	
Notify General Chair with ADA needs											X	X	X	
Notify Social Chair with dietary needs											X	X	X	
Share moderator volunteer information with Program and P.A.C.E. Chairs											X	X	X	
Obtain badges & ribbons											X	X		
Send confirmation email to attendees with specific conference info., e.g. handout password												X		
Print badges for registrants, exhibitors, guests, & speakers												X	X	
Print tickets for event entry, if using												X	X	
Prepare registration desk schedule												X	X	
Compile materials for packet stuffing meeting													X	
Set up a communication process in registration area													X	
Prepare cash box, Square, and receipt book													X	
Final report to General Chair													X	X
Attend wrap-up meeting														X
<b>Registration:</b>	<b>Nov</b>	<b>Dec</b>	<b>Jan</b>	<b>Feb</b>	<b>Mar</b>	<b>Apr</b>	<b>May</b>	<b>Jun</b>	<b>Jul</b>	<b>Aug</b>	<b>Sep</b>	<b>Oct</b>	<b>Nov</b>	



## **SOCIAL CHAIR**

The Social Chair coordinates the planning activities for social events including catering options during IMSS

### **Schedule of Planning Activities:**

Attend monthly planning meetings; submit report of activities to General Chair prior to each meeting

#### **Winter**

1. Review final report from previous year's Social Chair
2. Review contract for catering requirements
3. Review catering menu, making recommendations for social events
4. Coordinate with Program Chair and planning committee to determine social calendar at IMSS
5. Coordinate with Finance Chair to determine approximate budget for Social events

#### **Spring**

1. Propose social calendar of events to planning committee to include menu suggestions and social event options
2. Coordinate with Sponsorship Chair and Silent Auction Coordinator (if separate) to help where needed
3. Schedule an evening social event – determine location, theme, entertainment, food, etc.
4. Coordinate with Sponsorship Chair to obtain donations for social events

#### **Summer**

1. Coordinate with Hotel for all food and drink needs for the following functions:  
(All food and drink MUST be purchased from the hotel as part of the IMSS contract)
  - a) Lunch, Brunch, Breaks with the exhibitors
  - b) Continental breakfast and Coffee breaks for registrants
  - c) Scientific Assembly Lunch/Brunch or Break, if needed
  - d) Afternoon or evening appetizers, with or without Cash bar, with the exhibitors
  - e) IMSS Social Event (at Hotel or other venue) (menu, cocktail or cash bar)
  - f) Ensure special menu requirements are met for registrants
  - g) Any other functions as desired
2. Choose the Master of Ceremonies, if needed for Social Events
3. Silent Auction; work with Sponsorship Chair on this and refer to procedure under Sponsorship and Silent Auction
4. If functions are held away from the main facility, arrange for transportation when necessary

#### **Fall**

1. Serve as liaison with hotel.



2. Schedule volunteers to monitor food and drink during functions, serve as General Session and Exhibit Hall badge checkers, and serve as liaison with hotel, if Social Chair is unavailable
3. Coordinate with Publicity, Exhibit and Sponsorship to make sure sponsored Social events or (breaks, brunch, breakfast or lunch) have a table placard showing sponsor. Publicity chair is responsible for making the placards.
4. Responsible for the all functions of IMSS Social Event (entertainment, games, decorations, layout of room and furnishings)
5. Reconcile Social invoices (BEO) with General Chair and Finance Chair
6. Write "Thank You" notes to Social function volunteers as soon as possible after close of event
7. Attend wrap-up meeting
8. Prepare a final report for the Planning Committee Wrap Up Meeting following the seminar

### Limits

1. Coordinate with Finance Chair to ensure social budget does not exceed anticipated revenues.
2. No outside alcoholic beverages or food can be brought in if the event is held in the conference hotel. A cash bar is acceptable but must be arranged with the conference hotel.

<b>Social:</b>	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov
Review final report from previous year's chair		X	X										
Attend monthly meetings and submit brief report each meeting			X	X	X	X	X	X	X	X	X	X	
Review venue contract and catering menu	X	X	X										
Coordinate with Program Chair for Social Calendar	X	X	X	X									
Coordinate with Finance Chair to determine budget			X	X	X								
Propose calendar of events to planning committee & menu options					X	X							
Schedule Social Event					X	X	X	X	X	X	X		
Coordinate with Sponsorship to identify donation needs							X	X	X	X	X	X	
Coordinate with Hotel for all catering needs							X	X	X	X	X	X	
Solicit volunteers for food breaks and exhibit hall badge checkers										X	X	X	
Coordinate with Sponsorship Chair/Silent Auction Coordinator for auction needs at reception										X	X	X	
Arrange any transportation needs if necessary											X	X	



Coordinate with Sponsorship to ensure signage for sponsorships of breaks, lunches, brunches, etc.											X	X	
Reconcile BEO from hotel with Finance Chair and General Chair												X	
Final report to General chair												X	X
Attend wrap-up meeting												X	X
<b>Social:</b>	<b>Nov</b>	<b>Dec</b>	<b>Jan</b>	<b>Feb</b>	<b>Mar</b>	<b>Apr</b>	<b>May</b>	<b>Jun</b>	<b>Jul</b>	<b>Aug</b>	<b>Sep</b>	<b>Oct</b>	<b>Nov</b>



## **SPONSORSHIP CHAIR**

The Sponsorship Chair coordinates the sponsorship activities for IMSS

### **Schedule of Planning Activities:**

Attend monthly planning meetings; submit report of activities to General Chair prior to each meeting

#### **Winter**

1. Review final report from previous year's Sponsorship Chair and Silent Auction Coordinator
2. Arrange for oversight of Silent Auction; Sponsorship Chair either facilitates the Silent Auction as part of his/her duties or identifies a separate auction coordinator who works in tandem with Sponsorship Chair. Refer to Silent Auction Coordinator position description for details.
3. With the Silent Auction coordinator (if this will be separated) request Region VIII Council to determine charity for 50% of proceeds. Examples of past charities selected are Breast Cancer Research and Teton Free Clinic in Jackson. Make sure the Council specifies the desired organization. The remaining 50% is allocated to the Region VIII Leadership Academy.

#### **Spring**

1. Coordinate with Exhibits chair to contact potential sponsors, supplying them with information about the seminar and functions needing sponsorship, and request contributions. An attempt should be made to obtain sponsors for all speakers and social events, and possible door prizes for social functions.
2. Coordinate with program chair to determine the speakers needing sponsorship and their expenses.
3. Coordinate with social chair to determine the financial amounts needed to sponsor each social event.
4. Respond to potential company sponsors, Exhibits Chair contacts sponsors and forwards requests to Sponsorship Chair. Complete all necessary paperwork needed by the sponsoring company in order to receive any monetary donations. Send all financial donations received to the finance chair on an ongoing basis.

#### **Summer**

1. Contact potential donors of materials to be included in the registration packets. These materials may range from laboratory related items, note-taking materials (pens, paper, etc.), state tourism information/articles, or other fun or creative materials approved by the Planning Committee.
2. Prepare a complete list of all sponsors of the seminar and send to the Publicity chair to be included in the seminar program booklet mailer, and a final complete list for the attendee meeting packets.



**Fall**

1. Assist Publicity Chair in preparing signs (8x11) for Session rooms and social functions including sponsored Companies' names on signs with help from the Program Chair
2. Gather all materials collected for the registration packets and assist with putting registration bags together at IMSS
3. Assist Publicity Chair in preparing large signs listing all sponsors to be displayed in general areas.
4. Assist Exhibits chair with monitoring exhibit hall.
5. Assist Silent Auction Coordinator if separate individual from Sponsorship Chair
6. Send "Thank You" Letters/Certificates to all sponsors at the seminar.
7. Confirm that Silent Auction proceeds have been mailed with appropriate note
8. Prepare a final report for the General Chair and planning committee following the seminar.
9. Attend wrap-up meeting

**Time Frames**

All arrangements with required paperwork by commercial companies for sponsoring a speaker, awards, etc. should be made prior to the opening of the Seminar.

**Limits**

1. Each Exhibitor or Sponsor will be listed in the program if deadlines are met. All efforts will made to ensure Exhibitors and Sponsors are recognized. Company names will appear at sponsored functions, on signs provided by the planning committee, and will be announced for sponsored speakers.
2. Definitions are as follows:  
Exhibitor: Those companies purchasing exhibit space.  
Sponsor: Those donating to the general fund, sponsoring a workshop, or supporting the seminar in a significant way.

<b>Sponsorship:</b>	<b>Nov</b>	<b>Dec</b>	<b>Jan</b>	<b>Feb</b>	<b>Mar</b>	<b>Apr</b>	<b>May</b>	<b>Jun</b>	<b>Jul</b>	<b>Aug</b>	<b>Sep</b>	<b>Oct</b>	<b>Nov</b>
Review final report from previous year's chair		X	X										
Attend monthly planning meetings			X	X	X	X	X	X	X	X	X	X	
Determine facilitator for Silent Auction (If sponsorship chair is also coordinating the silent auction, refer to silent auction procedure)			X	X	X								
Contact potential sponsors		X	X	X	X	X	X	X	X	X	X		
Obtain breaks sponsorship						X	X	X	X	X	X		
Obtain donated registration bags							X	X	X	X	X		



Solicit for door prizes and bag stuffing materials							X	X	X	X	X		
Contact local tourism bureau for information											X	X	
Prepare list of sponsors for Publicity										X	X		
Assist Publicity Chair in preparing signs for educational sessions and social functions											X	X	
Assist Publicity Chair in preparing large signs listing all sponsors to display in general areas											x	x	
Assist Exhibits Chair with monitoring exhibit hall												X	
Write thank you letters to sponsors												X	
Confirm Silent Auction proceeds have been mailed												X	X
Final report to General Chair												X	X
Attend wrap-up meeting												X	X
<b>Sponsorship:</b>	<b>Nov</b>	<b>Dec</b>	<b>Jan</b>	<b>Feb</b>	<b>Mar</b>	<b>Apr</b>	<b>May</b>	<b>Jun</b>	<b>Jul</b>	<b>Aug</b>	<b>Sep</b>	<b>Oct</b>	<b>Nov</b>



## **SILENT AUCTION COORDINATOR**

The Silent Auction Coordinator will oversee the Silent Auction at IMSS, coordinating the event and eliciting donations for the auction.

### **Schedule of Planning Activities:**

Attend monthly planning meetings; submit report of activities to General Chair prior to each meeting

#### **Winter**

1. Review final report from previous year's Silent Auction Coordinator
2. With Sponsorship Chair, if separate, request Region VIII Council to determine charity for 50% of proceeds. Examples of past charities selected are Breast Cancer Research and Teton Free Clinic in Jackson. Make sure the Council specifies the desired organization. The remaining 50% is allocated to the Region VIII Leadership Academy.

#### **Spring**

1. As soon as a charity is decided, design and distribute flyers asking for donations to the Silent Auction. Think about sending a form to each state president asking for 3 items from the state.
2. Work with Social Chair and Program Chair to schedule the event
3. Create a form to submit information about the donated item and photo if possible
4. Make a flyer for the Planning Committee members to be included in their communications asking for donations. A sample letter is included in the cloud sharing platform folder.
5. If a receipt is requested use the receipt book when they deliver the gift on site.

#### **Summer**

1. Send out more reminders, using Facebook, blast email and other social media. Give people a mechanism to get the item to IMSS if they are not coming to the meeting.
2. Work with Exhibits Chair and Social Chair to confirm setup of the event during the vendor social
3. Prepare/print documents to use at IMSS. The cloud sharing platform folder under the IMSS folder has several documents:
  - a. Number sheet – cut these up and put the numbers in a 'hat' for participants to randomly pull out their bidder number
  - b. Signup sheet – participants enter their contact information (a "local" number so we can find them and get their money before they go home) and the bidder number on this sheet
  - c. Bidding sheets – one for each item. Include description of the item, estimated fair market value and starting bid.
  - d. Sample letter to vendors to participate
  - e. Sample flyer asking for donations
  - f. Sample instruction poster to use at the auction

#### **Fall**

1. Post information at registration desk letting folks know where to bring donated items
2. Set up receiving table and have stack of sheets ready to fill in item information. You will need the item description, estimated fair market value and starting bid. Optional – ask the donor if they would like their name listed on the bidding sheet.



3. Set up tables as soon as possible prior to the auction displaying items up for bid so participants can be viewing them prior to the start of the auction. Have a supply of pens ready to put one at each bid sheet (do not use pencils). Do not put the bidding sheets out until the auction is ready to start. Otherwise, people will start bidding early and using their names instead of numbers. Coordinate with the Exhibit Chair and Social Chair for placement of the tables.
4. All bidders must register and receive a bidder number for use at the silent auction. Post signs near the auction tables with instructions for participants.
5. Bidders must use their bidder number on the bid sheet for their bid to be valid.
6. Use bid sheets containing the item number, description, fair market value, opening bid amount
7. To place a bid on a silent auction item, bidders write in their bidder number and their bid amount on the bid sheet – DO NOT ALLOW USE OF PERSONAL NAMES FOR BIDDER ID
8. A suggestion is to put cheap reading glasses into wine glasses (or other containers) near the bid items to help people better read the descriptions and increase bids
9. Keep the action moving by making announcements throughout the auction, reminding participants when time is getting short. As closing approaches, let participants know how much time is left.
10. After bidding has closed, circle the winning bid and leave a copy next to the auction item
11. Winning bidders will pick up their item and bid sheet (or just the bid sheet if item is too large) and bring it to the checkout table.
12. Staff checkout table with enough people to receive cash, checks or credit cards. Provide receipt only if requested.
13. Use master sheets with sequential items numbered to record winning bidder number and amount. Each check-out station should have their own copy, do not try to use only one copy or this could create a huge bottleneck.
14. Prepare combined checkout totals for those bidders with multiple winning bids.
15. At the end of the auction, ask participants to take items with them to prevent loss.
16. If cash or checks are received, total those up and keep in a safe place until transferring them to the IMSS Finance Chair. Total the proceeds from all payment methods and report to IMSS Finance Chair, IMSS General Chair, and Region VIII Director
17. Attend wrap-up meeting
18. Write final report for IMSS General Chair

Silent Auction:	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov
Review final report from previous year's chair		X	X										
Attend monthly meetings and submit brief report each meeting			X	X	X	X	X	X	X	X	X	X	
Ask IMSS General Chair to confirm charity with Region VIII Council				X									
Coordinate with Program and Social to schedule event				X	X								
Prepare flyers for vendors soliciting donations and participation					X		X			X			



Prepare flyers for attendees soliciting donations and participation					X		X				X			
Make bidding numbers												X		
Gather pens; print bid sheets; sign-up sheets; payment sheets												X		
Set up the auction tables at IMSS													X	
Place one pen and one bid sheet at each item													X	
Ask for volunteers to help process payments													X	
Make sure all items have been paid for and picked up													X	
Give cash and final report of collections to IMSS Finance Chair													X	
Final report to General Chair													X	
Attend wrap-up meeting													X	X
<b>Silent Auction:</b>	<b>Nov</b>	<b>Dec</b>	<b>Jan</b>	<b>Feb</b>	<b>Mar</b>	<b>Apr</b>	<b>May</b>	<b>Jun</b>	<b>Jul</b>	<b>Aug</b>	<b>Sep</b>	<b>Oct</b>	<b>Nov</b>	



## **AWARDS CHAIR**

1. Awards will be the responsibility of the Region VIII Director.
2. The IMSS Member of the Year will be voted on by the Region VIII Council with nominees from each of the 5 states in Region VIII.
3. Other awards may be proposed and voted on by the Region VIII Council e.g., Industry Rep of the Year Award.
4. Celebrate Region VIII awardees in all categories (national, state, and regional) and National Committee Chairs and Members (i.e., poster, PPT or certificates)

### **Schedule of Planning Activities**

Attend monthly planning meetings; submit report of activities to General Chair prior to each meeting

#### **Winter**

1. Confirm with the sponsor that they are willing to again sponsor the award.
2. If necessary, find a different sponsor for the MOY award.
3. Obtain IMSS logo from the Planning Committee.

#### **Spring**

1. Following the spring meetings, contact State Presidents for their nominations for IMSS Member of the Year.
2. Send letter of congratulations and nomination/information form with a stated 'return by' date to nominees for IMSS Member of the Year. Include an invitation to attend the Awards Ceremony and information about when it will be held.
3. Work with Program Chair to ensure inclusion of Awards Ceremony at the conference

#### **Summer**

1. Send nomination form responses to Region VIII Council for deliberation
2. Distribute e-ballot link to Region VIII Council voting members and set a deadline to complete voting. Send an e-ballot tie breaker if necessary
3. Give list of IMSS Member of the Year nominees to the Publicity Chair to be included in the final Program Booklet
4. Inform sponsor of award winner name. Send copy of information form and brief bio for proper introduction at awards ceremony.
5. Arrange for presentation of the awards with the IMSS Program Chair and Sponsor
6. Research purchase of award; sponsored amount is \$500.



## Fall

1. Purchase MOY award
2. Check with sponsoring company of the awards to see if they wish to have someone at their company present the award they are sponsoring. If not, the Region VIII Director or designee can present the award
3. Conduct Awards Ceremony at IMSS. Acknowledge and report on all awards received by Region VIII members, national, regional and state awards.
4. Send thank you notes to sponsors of Awards
5. Attend wrap-up meeting
6. Prepare a final report for the Region VIII Council and Planning Committee following the Seminar

## Sponsors

### IMSS Member of the Year Award

Billings Clinic, 2019-  
 Bio-Rad Laboratories, 2013-18  
 Modern Laboratory Services, 2012  
 Baxter Scientific Products, 1966-2012

Awards:	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov
Attend monthly meetings and submit brief report each meeting	X	X	X	X	X	X	X	X	X	X	X	X	
Confirm sponsorship of MOY award	X	X	X										
Determine new sponsor if necessary	X	X	X										
Work with Program Chair to schedule Award Ceremony			X	X									
Obtain state MOY nominees						X	X						
Send nomination form to nominees							X	X					
Give list of nominees to Publicity Chair							X	X					
Send bios to Council members								X	X				
Distribute e-ballots to Council members; send e-ballot tie breaker if necessary									X	X			
Notify Sponsor of winner's name and bio										X			
Arrange for presentation of award with Sponsor										X	X		



Research and purchase award											X	X	X	
Conduct award ceremony													X	
Write thank-you letter to sponsor													X	X
Final Report to IMSS General Chair													X	X
Attend wrap-up meeting														X
<b>Awards:</b>	<b>Nov</b>	<b>Dec</b>	<b>Jan</b>	<b>Feb</b>	<b>Mar</b>	<b>Apr</b>	<b>May</b>	<b>Jun</b>	<b>Jul</b>	<b>Aug</b>	<b>Sep</b>	<b>Oct</b>	<b>Nov</b>	



## **FINANCE CHAIR**

The Region VIII Treasurer serves as the Finance Chair for IMSS.

### **Duties**

1. Work with Region VIII Director, IMSS General Chair, and IMSS Exhibits Chair to secure the venue for the coming year, signing necessary contracts.
2. Serve as the point of contact for contract negotiations with conference venue throughout the year
3. Attend monthly planning meetings; submit report of activities to General Chair prior to each meeting
4. Finance Chair is responsible for all finances of IMSS, receives all money for the seminar from vendors, participants, sponsors, etc., and ensures the funds are deposited in a timely manner.
5. Region VIII checking account is used for IMSS income and expenses
6. Credit or debit cards may be maintained for the use of the Planning Committee. The checkbook will remain with the Finance Chair (Region VIII Treasurer).
7. Keep a permanent record of all IMSS financial transactions.
8. Pay bills and reimbursements to IMSS Planning Committee members, balance checking account
  - a. Review each request for accuracy of required information and documentation
    - i. Form is completed correctly and received within the stated allowable timeframe
    - ii. Required signatures are provided
    - iii. Receipts are attached
    - iv. Calculations are correct and valid
  - b. Determine that sufficient funds are available in the respective account
  - c. Enter data into respective account record
  - d. Authorize payment by signing the form and entering the balance remaining in the account
  - e. Any discrepancies must be resolved prior to authorization
9. Serve as a resource for planning committee chairs to establish budgetary limits
10. Seminar expenses for the current seminar will be closed as soon as all expenses are paid and income has been received. Any funds left after paying the expenses for the current seminar will be divided as follows: (Funds will be paid to the treasurer of each group). If seminar results in a net loss, states may be required to reimburse a 1/6 share.
  - a. 1/6 to ASCLS Region VIII
  - b. 1/6 to ASCLS-Colorado
  - c. 1/6 to ASCLS-Idaho
  - d. 1/6 to ASCLS-Montana
  - e. 1/6 to ASCLS-Utah
  - f. 1/6 to ASCLS-Wyoming
11. All receipts and requests for payment must be submitted to the Treasurer within 45 days after expense is incurred, or payment may not be made
12. Reimbursement guidelines for IMSS Planning Committee are as follows:
  - a. 1/2 night's lodging up to current contract rate at conference hotel. All reimbursement will be based on actual expenses, with receipt submitted



- b. Lodging is comped if staying in the planning committee condo. Planning committee member must confirm intention to stay in the condo no less than 1 month prior to the conference and will not be reimbursed lodging if committee member chooses to change lodging to the hotel
- c. Registration fees: one complimentary registration per Committee chair. If there are co-chairs, one registration can be split between the co-chairs. Additional fees such as the Social fee are up to the committee member to pay if they wish to participate
- d. All Honorary Past Coordinating Committee members shall receive complimentary general registration provided they pre-register (Debbie Shell, Sandy Fiscus, Meg Stark are Honorary Past CC members).

13. Report on financial status to Region VIII Council.

14. Prepare a final report for the Region VIII Council and the Planning committee following the seminar

15. Attend wrap-up meeting

<b>Finance:</b>	<b>Nov</b>	<b>Dec</b>	<b>Jan</b>	<b>Feb</b>	<b>Mar</b>	<b>Apr</b>	<b>May</b>	<b>Jun</b>	<b>Jul</b>	<b>Aug</b>	<b>Sep</b>	<b>Oct</b>	<b>Nov</b>
Attend monthly meetings and submit brief report each meeting			X	X	X	X	X	X	X	X	X	X	
With the Region VIII Director, Exhibits Chair, and General Chair meet with venue rep to secure contract for following year	X											X	X
Process financial requests as needed	X	X	X	X	X	X	X	X	X	X	X	X	X
Serve as resource for planning chair budgets			X	X	X	X	X	X	X	X	X		
regional council report					X			X			X		
Final Report to General Chair												X	X
Attend wrap up meeting													X