European Board for Accreditation in Pneumology

SMART GUIDE:
HOW TO ORGANISE AN EVENT

Introduction

This smart guide contains recommendations, timelines, examples, tips and tools aimed at helping event providers design and organise meetings, conferences or courses.

The examples and timelines contained in this booklet should be adapted, as an event organisation is very much dependent on its nature and size.

We however hope that the below information will prove useful.

Needs Assessment

Before organising your event, we recommend you perform a needs assessments. This is an important step as this will help you:

› Identify the target audience
› Determine the event's topic(s)
› Agree on the desired educational outcome
› Decide which educational methods to use to reach the educational goal
› Decide the desired size of the event (number of participants). This will be dependent on the education methods used
› Design the event's programme
› Recruit the appropriate faculty members
› Apply for funding if/when necessary

Detailed information on how to perform a needs assessment as well as a template matrix designed to help you with this task are available to download from our website's documents' library.

⧗ *We recommend to initiate this process **24-18 months** before the event date.*

Budget

Budgeting for an event is a key step in the organisation process. This will:

› determine the participant's fees
› determine if additional funding (grants, sponsorship, etc..) is necessary

- › help negotiating contracts with potential sponsors
- › help negotiating rates with service providers

Below is a non-exhaustive list of items to take into account when establishing a budget.

- › Number of faculty members and home countries
- › Number of sponsored participants and home countries
- › Speaker's honorarium (if any)
- › Venue rental (conference room rental)
- › Catering costs
- › Technical support onsite
- › Rental for beamer, microphones, computer(s), etc. if needed
- › Signage
- › Voting pads /bar code reader rental (if needed)
- › Advertising & printing
- › Staff support
- › Telephone, internet, mail costs (including onsite)
- › Website design costs
- › CME accreditation
- › Miscellaneous other administrative expenses
- › Other expenses depending on the size/scope of the event
- › VAT

The following incomes should be taken into account:

- › Participants fees
- › Grants
- › Sponsorship

A template budget matrix is available to download from our website's documents' library.

⌛ *We recommend you start your budget early in the process, **18-12 months** before the event date to allow sufficient time in case additional funding needs to be panned for.*

Funding

Obtaining funds for your event is another milestone in the organisation process.

Applying for funding, either with specialist societies (European or national), with commercial sponsors (pharmaceutical or equipment companies) or at hospital level must be undertaken early in the process.

The funding application guidelines of the targeted funding institutions should be checked well in advance to ensure you meet the application deadlines.

Depending on the audience, topic and venue, the following institutions can be approached:

› European scientific societies
› National scientific societies
› Governmental agencies
› Universities, hospitals
› Pharmaceutical companies (*)
› Equipment companies (*)

⧖ *This process should be undertaken once your needs assessments and budget are finalised. We recommend you start investigating funding possibilities and application deadlines **24-18 months** before the event. We recommend for contracts to be **finalised no later than 6-4 months** prior to the event as this information will be needed if you apply for CME accreditation.*

(*) If you seek funding from pharmaceutical or equipment companies and plan to apply for CME accreditation, we strongly recommend you carefully check the CME accreditors' "guidelines on sponsorship" and "sponsor acknowledgement policy" prior to signing contracts with commercial companies. This will ensure you can comply with both the accreditors' guidelines and sponsorship contracts.

A template/example of an acceptable contract for events accredited by EBAP can be downloaded from our documents library.

As a rule, sponsors are not permitted to influence the event / presentations topic, scientific/organising committee or faculty members. Sponsors should not be able to select participants, or sponsor faculty members and participants directly.

Organising committee

For each event, and in particular if funded by industry, we propose setting up an independent Organising/Scientific Committee.

The members of this committee will be responsible to:

- Review and validate the needs assessment results
- Approve the educational outcome, educational methods and programme
- Select the faculty members
- Approve the budget
- Approve the funding / sponsorship requests
- Guarantee the independence of the event
- Ensure any potential COI is resolved prior to the event
- Eventually go through the slides prior to the event to ensure presentations are not biased.

Ultimately, this committee will be held accountable for the event organisation and content.

It will be composed of registered respiratory specialists considered experts in the event's topic.

Organising committee members should have no Conflict of Interest in relation with the sponsors.

> ⏳ *We recommend you set up the scientific/organising committee at an early stage, **24-18 months** before the event.*

Faculty

Faculty members should be selected by the scientific/organising committee and will be invited as soon as the event is confirmed.

Faculty members will receive clear information regarding the event as well as instructions of what will be expected from them, including:

- Event topic, time, date and venue
- Event educational outcome
- Event educational methods and why these methods were chosen
- Proposed topic of their talks

› Duration, time and date of their talk. This should specifically include the amount of time allocated for presentation, discussion and/or practical exercises

› Request to sign the Conflict of Interest form and to disclose their COI as a first slide on their PowerPoint presentation

› Instructions and deadline to produce their PowerPoint presentation

› Instructions and deadline to produce items to be included in the learner's hand-out (if any)

› Instructions pertinent to their travel and accommodation

› Information regarding their entitled honorarium or agreed travel expense reimbursement policy

⧖ *You should invite speakers as soon as they have been appointed by the organising committee (we recommend* **18-12 months** *before the event).*

Programme

The programme should be designed so that it is scientifically balanced, interactive and unbiased. It must be tailored to the audience to ensure the educational goals can be attained.

For obvious reasons, the programme can only be considered final on the day the event starts.

If you wish to request for CME accreditation for your event, we suggest you carefully read the accreditors' policy pertinent to programme and educational material publications, even if these are only disseminated electronically.

This is particularly important if your event has been funded by a commercial company. Failing to comply with the accreditors' policies on sponsor acknowledgement may lead to the accreditation rejection or withdrawal.

Event promotion

There are many ways to promote your event and below is a non-exhaustive list to pick from, depending on the financial resources available:

› Through partner hospitals and universities

- › Through the organising committee and faculty members
- › Website
- › National Respiratory Society
- › Medical Chamber
- › European Respiratory Society
- › Accreditors' website (if accredited)
- › Respiratory Journals
- › At other national or international events and congresses
- › Through the sponsors

> ⏳ *Promotion of the event can start as soon as the event programme, faculty, date, venue and participants' fee have been defined.*

CME accreditation

CME accreditation is a gage of quality which is appreciated by participants as it ensures that:

- › The programme has been reviewed by independent reviewers specialised in the field and was found to be of good quality
- › The programme is likely to deliver the desired educational outcome
- › The event was designed in a manner suitable for an international audience
- › The independence of the provider, scientific/organising committee and faculty members has been checked

Before applying for accreditation, we recommend that you read our smart guide on How to apply, available for download from our website's documents' library.

> ⏳ *The accreditation request should be submitted through EACCME online accreditation platform **18 weeks prior to the starting date of the event** in order to be processed. Failure to comply with this deadline will lead in the rejection of your application.*

Participants

We recommend that the target audience, as well as the eventual prerequisite is clearly stated in the programme and in the promotional material, so as to ensure that the learners know what to expect before registering to attend.

Participants' number should be adapted to the selected teaching methods. For hands-on courses, for instance, the number of participants should be limited to guarantee quality teaching.

Logistics

The level of logistical support that will be provided to members of the faculty and to participants should be decided at an early stage. Bear in mind that the level of support needs not be the same for all events, or between faculty and participants.

This will impact your budget, as staff time associated with logistical support must not be underestimated.

Depending on the event size, you may want to consider seeking support from a travel agent and/or PCO. In this case, contracts including roles and responsibilities must be negotiated.

Below are some items or questions that should be looked into in the planning phase:

› Prior to deciding on a venue and date, ensure no other big event (congresses, trade fairs, etc.) are taking place at the same time so as to avoid potential contingency issues and higher prices.
› Identify the venue and ensure the facility is big enough to accommodate your desired number of participants.
› Ensure that the selected venue is easily reachable by car and public transport and that the nearby airport has frequent and direct flights to other European countries.
› Identify and pre-book lodging. In case of a smaller event (>30 participants), will faculty and participants lodge in the same hotel?
› In case of bigger event (>30 participants), you may want to consider selecting hotels of different standards to accommodate a wider audience.

- › Will faculty and participants be responsible to book their own travel arrangements or will someone within your organisation (or PCO) be responsible for coordinating?
- › Will your organisation (or PCO) be responsible for centralising hotel bookings or will faculty and participants be required to contact the hotel(s) directly?
- › Will your organisation provide or arrange for transfers to/from the airport?
- › Are transfers between the hotel and venue necessary? If yes, will your organisation provide/arrange this?
- › Will your organisation provide lunch? If yes, does anyone attending have special dietary requirements? Will lunch take place at the venue? Book and negotiate menus with the catering company accordingly and beware of special dietary restrictions.
- › Will there be dinners or social events organised? Will transfer to/from the restaurant be arranged by your organisation?
- › Are any of your participant disabled? If yes, does the selected venue, hotel and restaurant provide the necessary infrastructure and support?
- › ….

> ⏳ *Logistical arrangements, in particular pre-bookings and contracts with travel agent, PCO, venue, hotel, transport companies, caterer and restaurants should be negotiated as soon as the programme, venue, date and desired number of participants has been decided. Depending on the size of the event, we recommend this is initiated **18-6 months prior to the event**, although this can only be finalised a few days before the start date.*

Post event report to partners

We recommend that during the event, organisers take note of any issue or problem that have arisen with the hotel, venue, caterer, contractors, etc.

This should be reported to the various partners, sponsors and contractors.

Learners' feed-back

Learners feed-back forms should be analysed and results should be included in the post-event report.

The feed-back form should include questions pertinent to the event organisation, programme and faculty performance. An example of a learners feed-back form can be downloaded from our website.

We recommend that faculty is also asked to provide feed-back.

> ⏳ *The event report must be completed and send to the CME accreditors no later than **1 month after the event**.*

Follow up with learners

To fully assess if the educational outcomes were met, organisers must put in place mechanisms to check the learners' satisfaction, what learners retained from the event and how this changed their practice.

Since outcomes may measure differently days, weeks or months after the event, we recommend participants are requested to provide their feed-back:

› At the end of the event
› Again 6 months after the event as a follow up form

The event organiser may want to ask learners for their consent and require they commit to responding to both questionnaires when registering for the event.

In addition, some providers will ask participants to sign a commitment to change document, to ensure learners are fully committed to apply what has been taught.

Measuring outcomes

We recommend that the results of the learners' feed-back and follow up forms is included in the Outcome Measurement Matrix or somehow analysed.

This will help determine if the event was successful, if the educational outcomes were reasonable, if the targeted audience and educational methods used were appropriate.

This will greatly facilitate the organisation and enhance quality of future events.

Timetable

A complete timetable showing each step of the event organisation outlined above is available to download from our website's documents' library.

For more information or assistance, do not hesitate to contact our office.

Visit us **ebap.org**