

## **University of Calgary Continuing Medical Education Office Services Provided and Costing Associated With Services**

The following document describes services that the CME Office could provide for in the assistance with program planning and logistics. The range of services provided is dependent on the client's requirements.

### **1. Program Development**

- Provide professional and experienced advice re: course planning.
- Participate in planning committee meetings.
- Facilitate or assign study credits of the College of Family Physicians of Canada, or the Royal College of Physicians and Surgeons of Canada. [Note: Assignment of study credits would not normally occur unless the CME Office was integrally involved in the entire planning process and design of the course, due to regulations established by the CFPC and RCPSC.]

Note: The program planning committee will identify, contact, and confirm program faculty.

### **2. Venue and Venue Contracts**

- Negotiate and book appropriate meeting, workshop, and display space.
- Arrange appropriate room set up based on program and speaker/faculty needs.
- Negotiate and book appropriate hotel rooms for faculty.
- Block hotel rooms for registrants, if appropriate.
- Provide 'hotel' or venue deposits, if required.
- Provide the venue with a list of people to be covered on the 'master list' and the name of the person who will be responsible for the event (including changes to food and beverage numbers, audiovisual equipment, room set-up, etc.). [Note: University rules allow payment only for food and hotel room. Incidentals are the responsibility of the individual.]

Note: Hotel contracts must be signed by the program organizers.

### **3. Guest and Local Faculty**

Note: The program planning committee must identify and contact program faculty and provide to the CME Office a database of faculty contact information.

- Send a letter of confirmation to faculty outlining their teaching obligations, honoraria, travel arrangements and expectations, deadlines for handouts and audiovisual materials, and other expectations (e.g., disclosure policy), as well as requesting information about hotel preferences, audiovisual, and other special requirements.
- Provide appropriate documentation to Immigration Canada and to the guest faculty for immigration clearance and Revenue Canada requirements.
- Prepare thank you notes to faculty members, which would include individual evaluation results.
- Handle receipt, processing, and payment of travel claim forms and honoraria.

#### **4. Advertising and Marketing**

- List the program in journal and newsletter calendar sections when the program director (or delegate) has provided the names and addresses of the journals/newsletters.
- Advertise the program in journals and newsletters when the program director (or delegate) has provided the names and addresses of the organization and 'ad' content. [Note: 'Ads' that use the University's name and logo and require purchase orders, require sufficient time in advance of the first ad to ensure that the ad meets University standards as determined by the Public Affairs Office, and the issuance of a purchase order. Many journals have 3 – 6 month requirements for their materials as well.]
- Monitor registration patterns and notify the planning committee if registration numbers fail to reach anticipated levels in a timely fashion.
- Correspond to email, phone or in-person inquiries from potential registrants.

#### **5. Brochure**

- Design brochure.
- Handle typesetting, proofs, and printing. [Note: Printing will be handled under the auspices of the University of Calgary Printing Services unless the client handles the entire printing process and takes it to an outside vendor whom he/she pays directly. This is a University requirement to ensure that the University receives the best price for its product and all printed materials conform to University's standards for printing, design and use of its logo.]
- In the event that the client handles the printing him/herself, and the University's name appears on the program, the CME Office must approve the final brochure draft before it goes to print. The client must provide an electronic PDF copy of the brochure to enable listing on CME's website.

#### **6. Brochure Distribution**

- Assist in identifying appropriate target audience.
- Request, coordinate, order, and pay for mailing labels for MD participants (Canadian and US).
- Provide assistance in obtaining mailing lists for non MDs. [Note: Creation and compilation of mailing lists is beyond the scope of the CME Office.]
- Coordinate mailing / distribution of brochures.
- Investigation of previously created email databases for brochure distribution.
- Email brochures to email databases already previously created.

Note: It is beyond the scope of the Office to create email databases.

#### **7. Website**

- Put course information and registration form onto the U of C, CME website ([www.cme.ucalgary.ca](http://www.cme.ucalgary.ca)). This information can be 'hot linked' to other websites.
- Should a group have a website, their website may be 'hot linked' to [www.cme.ucalgary.ca](http://www.cme.ucalgary.ca).

## **8. Course Materials**

- Obtain print-ready handout materials from faculty.
- Compile handout materials in an appropriate format (e.g., folder, binder, bound booklet). [Note: The CME Office cannot re-type handouts or assemble in innovative ways. Handouts that reach the office late cannot be incorporated.]
- Designing handbook with speaker handouts and auxiliary materials (eg., sponsor acknowledgement, program updates, maps, CME website information).

## **9. Evaluation**

- Develop an evaluation form for the program.
- Compile evaluations and prepare an evaluation report.
- Provide the planning committee with the evaluation report and faculty with individualized evaluations. [Note: This may take 6 – 8 weeks after the date of the program.]

## **10. Registration**

- Collect registration fees and provide tax deductible receipts in Canadian funds only. [Note: Cheque, VISA, MasterCard, AMEX are all acceptable. Registrations are accepted by mail or fax. E-mail registration is possible, however, computer security systems may not be adequate to protect registrant credit card numbers.]
- Handle incoming calls related to program, registration, and social events.
- Provide registrant names, on request, to the program chair or designate.
- Compile and provide each registrant with a course package that includes a name tag, handout materials, evaluation form, and other appropriate materials, e.g., social program and sponsorship materials.
- Provide a certificate of attendance with appropriate accreditation.

### **Note: Freedom of Information and Protection of Privacy Act (FOIP)**

*Registration information is collected under the authority of the “Freedom of Information and Protection of Privacy Act”. The information is required for internal purposes only to register delegates and to prepare course materials for their use. Financial information is used to process applicable fees. Distribution of the information collected for this purpose, in any form, is not permitted. Further information on this legislation may be obtained by contacting the Government of Alberta Information and Privacy Commissioner.*

## **11. Exhibitors / Sponsors**

- Advise on the need for exhibitors/sponsorship.
- Assist in the follow up of identified exhibitors/sponsors. [Note: It is most effective if program planning committee members make the initial contact with potential sponsors.]
- Compile exhibitor/sponsor packages, if needed.
- Assign display space.
- Coordinate exhibitor/sponsor AV/IT requirements for programs held at HSC or FMC. For offsite programs, exhibitors/sponsors will be referred to the contracted company providing the AV/IT services and will be responsible for any additional charges.

## **12. Accounting**

- Create a draft budget once the program, faculty, venue, social events, and other arrangements have been determined.
- Collect revenue and pay expenses incurred by the program.
- Provide updated information about course expenses, on request.
- Reconcile the program's account and provide a final statement of the account 3 - 6 months following the date of the final course. [Note: 6 months is often a realistic amount of time as invoices are rarely received in a timely fashion and faculty occasionally submit their bills very late or without the appropriate receipts.]
- Arrange transfer of remaining funds or invoice the client for a deficit account.

Note: The client is responsible for any program deficit that may occur.

## **13. Catering Requirements**

- Provide professional and experienced advice regarding catering.
- Coordinate catering to ensure appropriate food requirements are met.

## **14. Audiovisual Requirements**

- Coordinate and order appropriate audiovisual equipment for the program.  
Note: Equipment at hotels and other facilities is provided on a rental basis and will add considerably to the cost of a program.
- Faculty will be asked to provide to the CME Office an electronic copy of their presentation visuals prior to the program to aim for seamless plenary sessions. [Note: Workshop or breakout speakers are expected to provide their own laptops.]
- Coordinate videoconferencing, audio conferencing or podcasting, as necessary.
- Coordinate video/audio taping or podcasting of program presentations, as necessary (waiver forms will be required).

## **15. Ancillary Events / Social Functions**

- Coordinate activities (e.g., venue, catering) relating to society, board, or directors' meetings not directly associated with the educational component of the program.
- Coordinate logistics for social functions e.g., banquets, receptions, bus transportation, printing of tickets.

## **16. Fee Schedule**

The following is an example of a minimum conference office fee charged to programs. The final fee will be dependent, following discussion with the program director, on the complexity of the program. Note: exhibitors, displays, workshops, pre-course material, and posters add to program complexity.

**\$65.00 per delegate--half day course**

**\$70.00 per delegate--one day course**

**\$75.00 per delegate--1.5 - 2 day course**

**\$80.00 per delegate--2.5 - 3 day course**

**\$85.00 per delegate--3.5 - 4 day course**

[A minimum fee charged for services applies and is dependent upon the length of the program.]

## **17. Other Notes**

- **Hard Costs:** The client is responsible for all non staff costs incurred, i.e., printing, AV equipment rental, catering, postage, courier, venue rental, venue deposits, travel, etc..
- **Staff Overtime and Staff Expenses:** The program will be responsible for overtime incurred by staff after regular Office hours. Costs associated with travel, accommodation, meals, and gratuities for staff who travel out of town will be billed to the program.
- **AV Technician:** The Office will book an AV technician for the program. Normally the fee is \$45/hour. The technician will be responsible for all AV (slides, overheads, computer equipment, audio/videoconferencing), trouble shooting, sound, and ensuring each room is properly equipped. The AV technician cannot be responsible for poor quality visuals (e.g., old warped slides) and venue equipment that has been improperly maintained.
- **The CME Conference Fee** is charged for all registrants (including complimentary registrants), all faculty, and all onsite exhibitors and/or sponsors.
- A \$5.00 fee will be charged for each registered guest for social programs.
- Bank service charges for VISA/MasterCard (2%), NSF cheques, and wire transfers will be billed to the conference.
- Disposable items fee (name tags, certificates, etc.) of \$3.00 per registrant, registered guest, faculty, and all onsite exhibitors and/or sponsors will be billed to the conference.
- An administration fee of \$40.00 per cancelled registration (charged to the registrant) will be retained by the CME Office.

Fee schedule is effective April 1, 2009 and is subject to change.

The CME Office operates on a cost recovery basis and will assume no liability of expenses related to costs incurred if the activity is cancelled, or if the activity ends with a negative balance.

***Questions about the document are to be directed to the Associate Dean or Business Manager of CME, University of Calgary.***

*Revised: July 15, 2009*