

Medicare Summit Overview- For smaller chapters

Use this as a guide for things that will need to be considered when setting up a Medicare Summit. An abbreviated list of what NAHU and the host chapter will provide is available in the agreement.

Host committee:

In order to be successful, a chapter should have a host committee who shares responsibility and offers different skills to the overall planning and running of the summit. One individual should be appointed as the chair of the committee to oversee that everything is assigned and taken care of. A chapter may determine it is best to team up with another local chapter to combine resources and efforts. If more than one chapter is involved, at least (2) representatives from each of the host chapters should be on the committee. At least a few of the committee members should be familiar with the Medicare space although it is not required that all committee members are. This will be particularly helpful with selecting topics, speakers and knowing who to reach out to for sponsors and attendee invites.

It is up to the discretion of the host chapter as to how much help or involvement they would like from NAHU. NAHU will support the local chapter's efforts and provide assistance as needed and as our resources allow. Some examples of what NAHU can help with include: provide the necessary outline and steps to plan and run the event; suggestions for topics and speakers; help with finding and securing a location; working with sponsors; sending out press releases; providing templates for printed materials such as programs, flyers and other items as necessary.

Time Frame:

It is not recommended to plan a summit during Individual Market or Medicare open enrollment due to many people not being available for an event and because of the time commitment it will require from committee members. Late spring through early fall is usually a good timeframe for most.

Location:

The host chapter will secure a location big enough for the event. This could be a meeting room from a company, GA training area, hospital meeting room, hotel location or other venue space either rented or donated by a sponsor. The room size will determine the cap for attendees at the event.

Registration:

NAHU will provide assistance with registration through the NAHU.org website should the host chapter wish to use that service. If a chapter decides to handle it on their own they will need to provide a website link and the appropriate information so that the information can still be posted to the website.

Pricing:

This will be determined by the host chapter. The fee should be determined based on the cost of the space, food and other expenses associated with the meeting. Sponsors can help offset the cost but the goal of the sponsorships should be to generate revenue for the host chapter. Some chapters do recommend that the fee be the same for both members and non-members to draw in more people. This

meeting should be used as a potential opportunity for membership growth as well. Some have found that an additional incentive provided to non-members who join at the event has been successful to increased membership numbers.

Attendees:

While this is an event for a chapter and their members, it is also a way to promote new membership. By working with sponsors to get the word of the event out to their people and the local media it will provide an opportunity for local and national membership to grow.

Some chapters have been successful in providing an incentive for joining at the event as a way to promote membership. This commonly is done by refunding the event ticket fee if they join on-site.

Other chapters have been successful with getting a “membership” sponsor that allowed the chapter to use the money how they saw fit to promote membership. Some ideas include a photo booth, a “win” wheel with prizes attached, candy bars and reimbursement for the summit ticket along with a ticket to a local lunch meeting in the future. This is up to the host chapter’s discretion and should be done if it is feasible with funds. Regardless of what is done, or not, applications for local and state chapters and a membership representative should be readily available.

Topics:

Topics of the panel or tracks should be determined by the host chapter. Medicare general agents are helpful resources in selecting topics for the summit. Ideas for topics include: Social Security, prescription drug challenges, compliance, Medicare Supplements, generating referrals, the Medicare market and what is happening on a national level.

For larger meetings it might be beneficial to break up the session in multiple tracks based on skill level such as experienced agents and newbies.

Meetings hosted at the state level should include a representative from NAHU to talk about what is happening at a national level particularly on the regulatory and legislative side of things. NAHU has the most up-to-date information and can provide members with a look towards what will happen in the future. NAHU will work with the chapter to provide this representative to be at the local summit. Copies of our current Medicare newsletter will be provided to give out to all attendees of the summit.

If the summit wishes to include CE credits it will be the host chapter’s responsibility to contact the appropriate people for that state and go through the process of applying for it. NAHU and the Professional Development department can assist with the appropriate steps to take.

If a chapter wishes to incorporate a Medicare certification with their summit NAHU will handle that portion completely. This certification does have a cost associated with it but might be a nice incentive for those interested to do both the summit and certification at the same time.

Speakers:

NAHU has a database of approved speakers that can be used by the host chapter to determine their agenda. For smaller meetings it is recommended to hold a panel discussion with employees of various

companies and backgrounds. These panelists could be from the sponsors, the local chapter, or larger organizations that work in the Medicare arena. If a sponsor is hosting a break-out session it needs to be educational and not just commercial. All speakers and their content will need to be approved.

Sponsors:

The host chapter of this event will be in charge of contacting and securing sponsors. Potential sponsors should form a relationship with the host chapter leaders to provide more than just monetary donations. Potential sponsors should be sought out from FMO's (Field Marketing Organizations), general agents, the Medicare divisions of companies and physician groups.

Along with sponsorship money the host chapter should arrange for sponsors to send out invitations to their employees and agents for the summit. This can be done through email communication, ads in their publications and on their website. The more people that know about the event the more successful it will be, especially if a sponsor is inviting their people. These sponsors may have access to lists of interested persons that the chapter will not have.

Other sponsorship ideas include exchanging registrations for printed ads, meeting space or hosting the food and beverage. Sponsorships can be determined by the host chapter in terms of what the chapter will provide and what they will get in exchange.

This document should be used as a guide with the planning committee to ensure that all items are taken care of.

Gather **two** representatives from each of the chapters involved in the summit. The initial meeting should be **about 2 hours** in order to cover all the necessary materials.

After the initial meeting your committee will meet once a month leading up to the event and then weekly/bi-weekly the final month before the event.

Things to cover in the first meeting include:

- Mission and goals of the event
- Proposed date(s) for the event
- Decide on what kind of speakers your event will invite and what platform you will hold such as panel discussion versus breakout sessions
- Venue location
- Individual assignments (see below)
- Length of summit and if it will include a break/ lunch

Individual Assignments to be determined during the first meeting:

During the first meeting committee members should assign the following tasks in order to help move the planning process along. Some individuals may have to take on multiple roles depending on the size of the planning committee.

Overall Contact Person-

This individual will help organize future planning meetings, send out mass communications to the committee, and take minutes of each meeting and follow-up on any assignments. This individual must be organized and be willing to reassign things if someone is no longer able to fulfill their duties. This individual will be the main point of contact between the committee and NAHU as well as be the point of contact on all communications that go out to the masses.

Speaker point of contact-

This individual will reach out to the potential speakers and invite them to be a part of the event. They will also be the point person to give any updates, schedule information and handle travel and hotel if necessary. This individual will gather the speaker's bio and head shot to be used in printed and digital materials. It is important to follow-up with speakers as the date approaches to make sure there are no changes or cancellations.

Outreach assignments-

Assign each committee member with a list of carriers, hospitals and GA's to reach out to for potential sponsorships, exhibitors and attendees.

Registration-

This individual will either work with NAHU or with another website to get registration up for the event. This will include posting all updated materials such as the agenda, meeting day/time/location and pricing. Along with online registration, a paper form should be created **(see NAHU for template)** as well as flyers and sent to FMO's, general agencies, and carriers for their mailing lists and to be announced at local meetings and events. This individual will also handle the name badges, which NAHU can also help with the printing of if needed. They will keep a list of all those that have pre-registered or those that will register on-site if available.

Sponsorships-

While all members of the committee should be trying to get sponsors through their own contacts, it is good to have one person in charge of handling it all. **NAHU can provide a template with different ideas for sponsorship and a sponsorship agreement** but ultimately those determinations are up to the host chapter. Once a verbal agreement has been made with a sponsor NAHU can assist with the follow-up and contract. If the chapter wishes, NAHU will gather sponsorship payment, making sure the agreement is signed and following up about the sponsorship benefits provided such as complimentary registrations, ads for the program, company logos and whatever else should be provided per the agreement.

Media Outreach and Advertising-

Getting the word out about the summit is vital. This may include contacting hospitals, neighboring chapters, local agents, FMO's and publications. If you are able to get into a broker magazine or local paper to advertise the event you could possibly negotiate coverage or ads in return for them having a booth or table at the event and including their logo on printed materials. A press release should be sent out to the local media which will be done by the Public Relations department of NAHU.

Location-

This individual will be in charge of securing a meeting room and signing the contract if necessary. The location should be determined by the entire committee and look for potential "free" spaces from sponsors if available. NAHU can assist with suggestions of locations, handling the agreement and other items that will need to be included in the space such as the room layout, food and beverage, and making sure the appropriate A/V equipment is provided and set-up.

Program-

With help of the entire committee a schedule will be determined including the time frame, speakers, and topics. This individual will be in charge of creating and printing the programs, any flyers or other materials that will be available at the event. NAHU can also provide assistance with the design of these materials. This individual will be in charge of applying for CE credits and/or contacting NAHU about including a Medicare Certification if your summit wishes to include those.