

AED Educational Program Guidelines

This document has been prepared to assist AED members in planning and implementing special educational programs. Educational programs are defined as seminars, workshops, SIG teaching days or any other educational opportunities that AED members would like to propose to the field.

General Information

1. AED members are encouraged to present educational programs on topics of interest to the audiences served by each SIG (Special Interest Group), and/or to the broader eating disorders field.
2. AED educational programs are expected to perform on a break-even basis or better – surplus revenue is encouraged. Events budgeted at a loss must receive special approval by the AED Executive Committee.
3. AED's fiscal year begins on January 1, although the annual budget will be typically approved in November. Members should consider potential educational programs well in advance of the Fall Executive Committee meeting so that event budgets can be incorporated into the annual budget and approved by the executive committee in the Fall.
4. It is recognized that educational program opportunities may arise after the approval of the AED annual budget. In such cases, the executive committee will consider educational opportunities as an amendment to the budget.
5. Educational program dates must also be approved by the Executive Committee to ensure that there are no conflicts with other programs of AED and to ensure that adequate headquarters support will be available if such services are desired.
6. Members are encouraged to work closely with AED Headquarters staff and the AED SIG Oversight Committee (for SIG-sponsored educational programs) in scheduling, planning and budgeting for events.
7. All hotel/ facility contracts must be reviewed by AED staff and signed. Volunteers cannot sign any hotel/ facility contracts.

SIG-Sponsored Teaching Day Submission Procedure

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|--------|---|
| Step 1 | Fill out submission form and consult with SIG Oversight Committee (SOC) liaison. |
| Step 2 | SIG liaison submits proposal to the SOC for review. |
| Step 3 | SOC sends proposal to Education and Training Council co-chairs for review. |
| Step 4 | Education and Training council co-chairs submit the proposal to the board for final approval. |

Other Educational Programs

- | | |
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| Step 1 | Fill out submission form and consult with Education and Training Council co-chairs. |
| Step 2 | Send to Education and Training Council co-chairs for review. |
| Step 3 | Education and Training Council co-chairs will submit proposal to the board for final approval. |

Suggested Timelines

WHAT	WHO	WHEN
• Identify event topic	Member	8–10 months out
• Establish budget	Member/Staff	8–10 months out
• Select city/hotel	Staff/Member	7–8 months out
• Finalize session topics & speakers	Member	5–6 months out
• Provide program copy to AED HQ	Member	4–5 months out
• Mail promotional brochure	Staff	3–4 months out
• Add event brochure to Web site	Staff	3–4 months out
• Register attendees	Staff	0–2 months out
• Coordinate logistical details	Staff	0–2 months out
• Coordinate speaker handouts	Member/Staff	1–2 months out
• On-site management	Staff/Member	
• Follow-up	Staff/Member	0–1 month after

Budget

After it has been determined that there is a topic or issue worth developing into an educational program, the first critical step is the creation of a budget. AED has taken a conservative approach to finances throughout its history and that approach has served the organization very well. It is therefore encouraged that a conservative fiscal approach is followed here as well. That means projecting revenues conservatively and projecting expenses somewhat more aggressively. It is recommended that staff be consulted when preparing the first draft of the budget. A budget worksheet is attached to assist you in thinking about the financial management aspects of conducting events.

Staff/Volunteer Responsibilities

AED's management agreement with The Sherwood Group does not provide for staff services to support educational programs other than the teaching day workshops held before the ICED and the ICED. To the extent that staff services are required for additional educational programs, management fees will be assigned against each event. The fees will be based on the level of services required, the projected attendance, the length and location of the educational program and on other relevant factors.

Sherwood's management fees will typically be in the range of \$2,000 - \$5,000 per educational program. In addition, direct expenses incurred by the AED headquarters office will be assigned as expenses against each educational program. In some circumstances, alternative meeting support may be available, and in these cases, all planning will be reviewed and coordinated by AED headquarters.

Following is a menu of services that Sherwood can provide to members in support of educational program initiatives. Following that is a list of responsibilities typically associated with the member volunteer.

AED Headquarters Staff

I. Site Selection/Negotiation

- Under the direction of the member, staff is to research and negotiate hotel contracts. Typically, AED educational programs do not include a site inspection visit to potential hotels due to the additional staff time and direct expenses associated with such trips. However, staff will conduct site inspections at the direction of member.

II. Marketing

- Develop the design/look of the event brochure.
- Receive copy from the member and typeset. Staff prepares the registration form and general information.

III. Program Management

- Receive speaker selections from the member and send confirmation letter.
- Collect information from speakers – biography, audiovisual needs, and handouts, etc.

IV. Continuing Education Credits

- Prepare and submit CE applications to accrediting bodies. Follow-up on approvals.
- Work with program committee to implement any applicable CE rules; e.g. needs assessment, session lengths, resolving speaker conflicts, etc.
- Supply appropriate CE accreditation statements on all major print/publicity pieces.
- Work with staff on implementing CE rules as related to sponsorships, exhibitors, advertising, etc.
- Prepare CE application forms/packets for attendees, process applications, mail certificates, archive hours earned.

V. Call for Abstracts

- Receive copy from member and post on Web site, listserv, and E-mail to AED database.

VI. Registration

- Register all speakers and attendees and send a confirmation letter.
- Produce name badges.
- Produce registration roster.
- Coordinate on-site registration.

VII. Pre-Meeting Arrangements

- Negotiate/select food and beverage menus.
- Coordinate A/V, sets, VIP housing, signage, and office equipment.

VII. On-Site Management

- Coordinate and manage A/V hotel personnel, all service contractors.
- Manage registration desk, distribute course materials.

IX. Financial Management

- Assist member with budget preparation for Executive Committee approval.
- Receive and process all income.
- Approve invoices for payment.
- Prepare monthly and final financial summary and registration figures.

X. Post-Meeting Follow Up

- Compile results of overall evaluation form and provide member with evaluation results.
- Prepare speaker thank you letters.

AED Volunteer/Member Responsibilities

I. Site Selection/Negotiation

- Provide input for selection of city/hotel.
- Approve hotel/contract and send to AED headquarters for signature.

II. Marketing

- Provide copy for the workshop brochure.
- Approve event brochure design.
- Approve final layout/copy of brochure design.

III. Program Management

- Select workshop topics and all speakers.
- Follow up with speakers to submit their handouts/biography in a timely manner.

IV. Registration

- Provide staff with a list of speakers to receive complimentary registration/honorarium and/or hotel rooms.

V. Continuing Education Credits

- Provide the overall learning objectives and needs assessment.
- Resolve speaker conflicts on CME programs.

VI. Pre-Meeting Arrangements

- Approve overall evaluation forms.
- Arrange/conduct conference calls as needed.

VII. Letter of Agreement

- Educational programs originating outside of the SIG Oversight Committee will require a signed letter or agreement.

VIII. On-Site Management

- Facilitate the educational/speakers portion of the program.

XI. Financial Management

- Work with AED headquarters to ensure expenses stay within budget.

X. Post-Meeting Follow up

- Review results of overall evaluations and suggest changes as needed (if applicable).

AED Educational Program Submission Form

AED Contact Person

Name _____

Title _____

Address _____

Fax _____

Phone _____

Email _____

Check the type of educational program you propose:

___ SIG Teaching Day (Name of SIG _____)

___ Conference – Co-sponsored by AED and (name of collaborating organization) _____

Proposed Chair/Co-chairs _____

Name of Proposed Educational Program: _____

Brief Description/Purpose/Educational Objectives:

Proposed Dates: _____

Proposed Location: _____

Length of Educational Program: ___ 1 day ___ 2 days ___ 3 days ___ 4 days ___ Other

Proposed agenda with titles of planned talks and speakers (if known):

Estimated number of paid attendees: _____

Estimated number of speakers/presenters: _____

Will speakers/presenters registration fee be waived? Yes No

Will speakers/presenters be given a complimentary hotel room? Yes No

Check the types of continuing education credits you would like the conference to be able to offer attendees:

CE Credit Application Costs

___ Physicians (CME)	\$1,000
___ International CME	\$30 (only applicable if offering CME)
___ Family Physicians	\$110 (only applicable if offering CME)
___ Dieticians	None
___ Nurses	\$15 per attendee
___ Social Workers	\$200 plus \$10 per attendee (assuming a 1-day event)
___ Psychologists	None
___ MFT's and LCSW's	None
___ Other: _____	

Estimate the number of abstracts to be submitted _____

Estimate the number of food facility and costs: (costs are available through the hotel/facility)

Coffee Breaks _____ Breakfasts _____ Lunches _____ Dinners _____ Receptions _____

Additional Comments:

For questions regarding this educational program, contact the SIG Oversight Committee chair. If you are submitting an educational program that is not a SIG teaching day opportunity, contact the Education and Training Council co-chairs. For questions regarding logistics and budget, contact Judy DeAcetis at jdeacetis@aedweb.org.

AED Headquarters Educational Program Management Fees

Educational programs requiring all services described below will receive a discounted, all-inclusive management fee based on specific educational program requirements. Contact Judy DeAcetis for details.

Site Selection/Negotiation \$300 (without site inspection visit) \$825 plus travel expenses (includes site inspection visit)

- Under the direction of the member, staff is to research and negotiate hotel contracts. Typically, AED educational programs do not include a site inspection visit to potential hotels due to the additional staff time and direct expenses associated with such trips. However, staff will conduct site inspections for an additional charge, at the direction of member.

Marketing \$500–1,000

- Develop the design/look of the educational program brochure (printing and postage additional).
- Web site posting.
- Create and manage online registration form/process.
- Email blasts.

Program Management \$375–425

- Receive speaker selections from the member and send confirmation letters.
- Collect information from speakers – biography, audiovisual needs, handouts, etc.

Call for Abstracts \$300–400

- Layout and post on Web site, listserv and E-mail to AED database.

CE/CME Management \$60 per hour

(Time estimates range from 15-30 hours depending on level of activity)

- Prepare and submit CE applications to accrediting bodies. Follow-up on approvals.
- Work with program committee to implement any applicable CE rules; e.g. needs assessment, session lengths, resolving speaker conflicts, etc.
- Supply appropriate CE accreditation statements on all major print/publicity pieces.
- Work with staff on implementing CE rules as related to sponsorships, exhibitors, advertising, etc.
- Prepare CE application forms/packets for attendees, process applications, mail certificates, archive hours earned.

CE Credit Application Cost

- Note: The CE/CME Management cost does not include the application costs.
See the Budget Worksheet under Expenses – CE/CME Fees for CE provider application costs.

Registration \$525–625

- Register all speakers and attendees and send a confirmation letter.
- Produce name badges.
- Produce registration roster.
- Coordinate on-site registration.
- Send materials to AED volunteers if staff is not required to be on site.

Pre-Meeting Arrangements \$425–525

- Negotiate/select food and beverage menus.
- Coordinate A/V, sets, VIP housing, signage, and office equipment.

On-Site Management \$625 per day plus travel to/from educational program site

- Coordinate and manage A/V hotel personnel, all service contractors.
- Manage registration desk, distribute course materials.

Financial Management \$60 per hour

(Time estimates range from 10-25 hours depending on level of activity)

- Assist in the preparation of budget for educational program.
- Receive and process all income.
- Approve invoices for payment.
- Prepare monthly and final financial summary and registration figures.

Post-Meeting Follow Up \$150–225

- Compile results of overall evaluation form. Send to member.
- Reconcile master hotel bill.
- Prepare speaker thank you letters.

AED Educational Program BUDGET WORKSHEET

Revenue

- AED member with early registration
- AED member with late registration
- Non-member with early registration
- Non-member with late registration
- Full-time student (with verification)
- Sponsors
- Advertisers
- Other (please describe)

Expenses

Marketing

- Promotional brochure, including typeset, design, print and postage
- Purchase of mailing lists

Call for Abstracts

- Purchase of mailing lists
- Email blasts – brochure/abstracts
- Post on the Web – brochure/abstracts

CE/CME Credit Application Fees

Check all that apply:

- Physicians (CME) – \$1,000
- International CME – \$30 (only applicable if offering CME)
- Family Physicians (only applicable if offering CME) - \$110
- Dietitians – None
- Nurses – \$15 per attendee
- Social Workers – \$200 plus \$10 per attendee (assuming a one-day event)
- Psychologists – None
- MFTs and LCSWs – None
- Other

Speakers

- Honoraria
- Travel Reimbursement

Attendees

- Breakfasts
- Lunches
- Dinners
- Coffee Breaks
- Receptions
- Handout Materials

ED Educational Program BUDGET WORKSHEET

Staff

- Sherwood Management Fee
- Staff Travel

General

- Meeting room rental
- Bank Fees
- Telephone
- Photocopies
- Misc. Postage
- Shipping
- Badges
- Supplies
- Signs
- Audio Visual

Final Program/Proceedings

- Design and Typeset
- Production
- Distribution

*All income and expense categories will not necessarily pertain to every educational program.

AED Educational Program

Letter of Agreement

The AED Board has agreed to co-sponsor the Event Name on Event Date. AED agrees to divide costs and profits 50/50. AED also agrees to promote the event and conference on the AED Web site and in IJED.

AED expects that the Cosponsor Name will promote any upcoming AED events and conferences via media at its disposal.

Cosponsor Name will use the AED logo in promotions and list AED as cosponsor in printed and electronic materials. AED will receive free exhibition space in a prominent location for use in distributing promotional materials at the meeting. AED will receive a copy of the meeting attendee mailing list and email addresses. Cosponsor Name will display prominent signage acknowledging AED co-sponsorship of this event. Cosponsor Name will provide detailed financial records of this event and agrees to split profit and loss equally with AED.

We look forward to collaborating on this event and networking in the future to promote educational offerings.

Official Signatures:

AED _____, Date _____

Cosponsor Name _____, Date _____