The 2013 Intercompany
Long Term Care Insurance Conference

SESSION PRODUCER GUIDELINES

Developing a Session

- Typically, a session has **two** speakers and the producer (usually also the moderator) with expertise on a given topic. The specific topic should be one that is timely and relevant to either a track specific, technical audience, or a multi-functional audience. The producer acts as moderator and is the driver behind how the session develops in the same manner as a film director/producer, and is responsible for recruiting the speakers. You'll be working with other Session Producers within your track to ensure that there isn't overlap or duplication of sessions. Session producers are expected to speak at the conference as well.

- Recruiting two speakers for your session.
  - Diversify the panel both by company and perspective, using unrelated participants (field vs vendor, vs home office, vs consumer advocate). For example, a speaker from a vendor who works with a speaker from a company is not diversified.
  - Ensure speaker's expertise either through background or relevance to topic. Let your presenters know that conference material is published on the website at the time of the conference.
  - Obtain commitment for the conference deliverables and timeline. Because of the mobile application, the conference book, and the website, this will often mean preparing the session earlier than the speaker may be familiar with at other conferences. It is imperative that everyone commit to this schedule to prevent significant extra work for the executive and organizing committee. The speaker should expect to spend some time in the late summer and early fall on conference calls to plan out the session, followed by more time in the late fall and early winter developing the session and any power points needed for the session. Finally, there is a significant time commitment in early January finalizing the session, prior to the conference (which is much earlier than usual this year). The Conference Timeline is attached for your convenience.

The Administrative Details

- Complete the "Session Participant Contact Information" form for each recruited participant and return it to your Track Chair within 5 days of recruiting. Complete one for yourself as well. A biographical sketch for the Conference Booklet is also required. This can (and should) be requested as soon as you begin to work on the session but must be provided no later than **November 15th**. If the speaker has presented in the past three years, it is likely that his or her biography is in our database, but will need to be updated and new for this year, we also need photos.

- If your session includes participant(s) who require a travel subsidy, the subsidy approval must be pre-approved. Please indicate the request on the Session Participant Contact Information. There are a limited number of people who can be approved for subsidy. Please be sure that your speaker realizes that the subsidy may not cover their expenses, but are only designed to partially offset them. Please coordinate your requests through your Track Chair or Co-chair. (**SEE SUBSIDY RULES ON NEXT PAGE**).

- Subsidy Rules:
  - What is Reimbursed:
    - Up to two nights of hotel (room and tax only), payable through Master Bill. No reimbursements for other charges to the room or while at the conference.
    - Airfare and travel incidentals are subsidized up to a maximum of $400, with receipts, for transportation to and from the conference. **Any airfares must be purchased by February 1st** to be eligible for reimbursement of the airfare portion. No other incidentals are reimbursable.
  - Who is Eligible for Reimbursement:
    - Regulators, Public Policy (not involved in consulting, Non-Profit Provider Associations (not involved with long term care insurance), Academics
    - In addition, the eligible person must not have any commercial interest.

- Set up your Session Call Schedule to dovetail with the Conference Call Timeline that your Track Chair has set. After speakers are confirmed, establish a phone or email conference schedule with your panel. Work with them to establish a working calendar so everyone is comfortable with expectations. It is easier if you provide a calendar with a set day and time. Provide an agenda two days prior to each call that defines what you hope to accomplish with the conference call.

- The Organizing Committee will provide a calendar showing the important dates for printed material to be finalized. Use this calendar in order to create the timeline for your session.

- Determine if a speaker's presentation needs to receive pre-approval by his or her internal compliance department or by a government entity when planning your session. Allow time in the calendar for this pre-approval. Inform your Track Chair or Co-chair when pre-approval is required.

Building the Session

- The Session Producer will prepare a short introduction for each speaker to be presented at the beginning of the workshop. It should just be a few lines since the full biography will be in the handout package. Preference in the past has been to introduce all speakers at the beginning of the session.

- Discuss the format that the session will take. Definitions of the various formats are in the Session Formats attachment. Try to leave at least 10-15 minutes for questions.

- Work with speakers to establish the order of presentations and to coordinate content. As the Session Producer, you should advise your speakers that commercialism and self promotion is not permitted. The Track Chair and Co-Chair will review presentations to assure compliance with this request. Discuss how long each person is expected to talk. The Session Producer is responsible for keeping the speakers and the audience to the session's timetable.

- Depending upon the format, you may need to request special set-ups or audio equipment. Please inform your Track Chair or Co-Chair of your needs as far in advance as possible. This is also a good time to decide who will bring the laptop for the presentations. Audio/visual equipment will be provided; however, the laptop isn't.

- When registration is available on line, contact your speakers and remind them to register as speakers. Instructions will be distributed as the web-site goes live.

- Most of our educational sessions utilize Power Point presentations. As the Session Producer you are responsible for the content, consistency and coordination of the Power Points for your particular session. The Power Points must also be reviewed by the Track Chair or Co-chair. This review is for legibility and commercial content. Changes after the drop dead date are to be avoided. However, there are times when this cannot be avoided. If revisions do occur after the drop dead date, you will need to review for legibility and commercial content, and advise the Track Chair or Co-Chair if there is a problem. If the revisions are acceptable, be certain to announce the changes at the beginning of your session and let the attendees know that the revised version will be available on the website a couple of weeks after the conference.
- If there hasn't been a face-to-face meeting prior to arrival at the conference, arrange for your presenters to briefly meet with each other before the session.