



Speaker Policy
(Updated July 2015)

Policy Purpose

This policy establishes guidelines for contracting with speakers who are not members of the Oregon HFMA Chapter, which consists of the initial contact, informing speaker of presentation expectations, HFMA's expense reimbursement policy, and follow-up after conclusion of session. For guidelines regarding speakers who are members of the Oregon HFMA Chapter, see Addendum A, at the bottom of this policy.

- In working with speakers requesting expense reimbursement or honorarium, please reference Oregon HFMA Travel Policy for details on expense guidelines. Typically, we do not pay speaker fees. Speaker fees should be an exception, not the rule and must be preapproved by both the president and president-elect.

Procedures

Initial Contact w/Speaker:

Confirm in writing (see attached sample letter), even if via e-mail, the following:

- Location and date
- If requested by the speaker, Oregon chapter can pay for reasonable travel costs in adherence with our Travel Policy
- Define audience, including demographics and number, for speaker so as to tailor program content
- Inform speaker that it should not be a sales presentation
- Speaker's topic and program content
- Program time and length of time speaker has
- A/V needs
- Speakers are responsible for their own travel arrangements
- Reimbursement policy and number of hotel nights that will be reimbursed (refer to Travel Policy)
- Obtain approval for any education program expenditures from President or President-Elect before financially committing chapter
- Provide Treasurer with copies of speaker contracts and payment arrangements
- Request brief paragraph from speaker on topic for inclusion in meeting agenda

Confirm Presentation topic, content and material expectations:

- PowerPoint or other appropriate media
- Introduce topic and state learning objective

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- Consider presentation time, allowing for questions
- Audience involvement with retention and learning desired
- No commercial content
- No proprietary content restrictions
- Variety
- Appropriate font size
- Keep slides concise, easy to read from a distance

Just prior to meeting dates:

- Notify Member Activities chair of speaker's A/V needs
- Obtain speaker's handouts if they are sending in advance and make copies as necessary
- Arrange for introduction of speaker

After the event:

- Obtain speaker's expense report with receipts within two weeks after the event or expenses incurred
- Review expenses for reasonableness and adherence to Oregon HFMA Travel policy
- Forward expense report for President-Elect for authorization to pay

Addendum A

Speakers who are members of the Oregon HFMA Chapter and wish to attend sessions in addition to the one at which they are speaking, are asked to register for the conference as members, and will be offered a \$50 discount for that registration.



SPEAKER CONFIRMATION

Dear **Matt**,

Thank you for agreeing to present during the HFMA Oregon Chapter's **2015 Summer Conference at Mt. Bachelor Village in Bend, Oregon**. We are very excited for your presentation and look forward to meeting you. This confirmation will provide you with the details you need and also includes a listing of information we need from you to make your presentation as successful as possible.

DATE/TIME/LOCATION: The conference begins Wednesday, **July 15th** and ends at noon on Friday, **July 17th**. You are welcome to attend any sessions in addition to your own. A full schedule of events can be found on our website at: www.oregonhfma.org. The address for **Mount Bachelor Village Resort is 19717 Mount Bachelor Drive, Bend, Oregon**.

PRESENTATION: You are scheduled to participate in a panel "**CFO/Patient Account Leadership Panel: Teamwork Challenges, Tips and Priorities**" on Thursday July 16th from 8:30am – 10:00am. Please try to arrive at least 20 minutes prior to the session to be sure everything is working properly, and leave no more than fifteen minutes at the end of your presentation for questions. We ask that you please email your presentation (if you have one) and any additional materials you may have **by July 7th**, so that we can post it on our website and make it available for our membership prior to the meeting. I will also need your bio so that I may introduce you.

AV: If you require anything more than a laptop, projector and lapel microphone, please let us know so that we can adequately prepare for your session. Your presentation will be loaded on a flash drive and my laptop available for your use, or to serve as a backup if you intend on bringing your own.

REGISTRATION: We ask that you please register for the conference so that we may prepare your name badge, provide you with hotel and parking information and have a correct head count for meals. Please register at <http://www.oregonhfma.org/events-registration.html>. On the Payment Page, please enter **speaker** in the Discount Code box and click on the Apply button once. If you should have any questions, please do not hesitate to contact our registration coordinator, Norma Pearce at norma@gemtasks.com or (360) 308-8222.

EXPENSES: Please refer to the HFMA Oregon Chapter's website at www.oregonhfma.org and select the "Chapter Information" tab for information and instructions regarding the travel and reimbursement policy. You can find information under "Speaker and Travel Policies" and "Member Expense Reimbursement Form", which is located under "Other Documents" header.

We look forward to having you join us and are here to help you in any way. Please feel free to contact either of us with questions or concerns at any time.

Sincerely,

Janet Malmberg
Patient Accounts Programs Chair
janetmalmberg@aol.com
(801) 455.2340 cell

Kenneth Mitchell
Patient Accounts Programs Co-Chair
mitchken@ohsu.edu

Title: CFO/Patient Account Leadership Panel: Teamwork Challenges, Tips and Priorities		
Presenter: Matt Navigato	Date: July 16, 2015	Time 8:30am - 10:00am

BROCHURE WRITE-UP

This session will cover:

Panel discussion with Finance and Revenue Cycle Leaders.

After the session, attendees will:

AUDIO/VIDEO NEEDS

- I will provide my own laptop.
- I need Oregon HFMA to provide me a laptop.
- I will need a projector.
- I will need a podium microphone.
- I will need a walking microphone.
- Other needs (flip charts, etc.) _____

HANDOUTS

We ask that a PDF copy of the presentation is available at least one week prior to the conference. We will upload the presentation to the Oregon Chapter website, which allows the attendees to download and print at their convenience.

BIOGRAPHIES

TRAVEL

- I or my company will be covering all travel expenses.
- I would like Oregon HFMA to pay for my travel expenses (available for non-chapter members only). I will submit my travel forms by March 1st. The expense reimbursement form will accompany this agreement.

Signed by SPEAKER: _____ Date: _____

Cell Phone (for day of conference contact): (____) _____ - _____

Please return by email or fax by February 9th to:

Janet Malmberg
Patient Accounts Program Chair
801.455.2340