PRIM&R
PUBLIC RESPONSIBILITY IN MEDICINE AND RESEARCH

Regional Connections **Overview**

If you've always wanted to connect with colleagues who work or live nearby to talk, network, and exchange ideas, but thought you didn't have the time or resources to pull it off, PRIM&R has just the solution: **PRIM&R Regional Connections**.

Collaboration is critical to success. That's why PRIM&R established the Regional Connections program: to encourage our members to share resources and engage in debate. Whether it's a lunch, an educational program, a networking reception, a book group, a short lecture, or a policy discussion, the possibilities are endless.

PRIM&R is committed to helping you, our members, build your regional community and further your professional development. To help facilitate regional events, PRIM&R has gathered some tools to help get you started and keep your program on the track to success. To get started, take a look at our checklists, tips, and other great resources in this toolkit. Additionally, PRIM&R offers funding, up to $1,000, to help defray the cost of these activities. A short application is required (**available online**) and the following criteria must be met:

1. The event must be member-led.
2. The funding application and content of the program should reflect PRIM&R's **mission** and the purpose of the **Regional Connections program**. Preference will be given to programs that include a goal of helping build a regional community.
3. The event falls outside the scope of the day-to-day activities of the member and/or host institution.
4. We ask that you show a brief PowerPoint presentation or provide information orally about PRIM&R.
5. All advertisements, including flyers, letters, electronic publicity, and event listings, must be reviewed in advance of distribution by PRIM&R and should include the PRIM&R logo accompanied by the following text: "Financial support provided in part by Public Responsibility in Medicine and Research (PRIM&R)"
6. To help us tell others in the PRIM&R membership community about your event, a short program summary suitable for publication in our *PRIM&R Member Newsletter* must be submitted within 60 days of the event.
7. An itemization of expenses and an attendance list must be provided within 60 days of the event, along with a summary of the event evaluations, if applicable.

Once your application is approved, PRIM&R will publicize your event by posting announcements on our online Events Calendar. In addition, PRIM&R can help connect you with members in your area.

Interested in getting started with your Regional Connections event? Have questions? Contact our membership team at **membership@primr.org** or 617.303.1875.

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Regional Connections

Ten Steps to Success

Ten Steps to a Successful PRIM&R Regional Connections Event

While all of these steps may not be necessary, depending on the event you are organizing, these are questions worth considering throughout the planning process.

1) Define the scope of your event and determine your objectives.

At the outset of the planning process, spend some time visualizing what you hope to accomplish through this event, and how you will reach those goals. Consider the following:

- What kind of event is it?
    - Educational - in-depth learning on topics of interest to those in the field
    - Networking - an opportunity to get to know others in the profession
    - Professional development - a program that focuses on career development and advancement, such as leadership skills or certification
    - Some other type of event
- What are your learning objectives? Some possible topics are listed on page five of this toolkit.
- Who is your target audience?
- How long should the event be? An hour or two? A half day? A full day?
- When should the event be held? (The planning process may require two to four months for smaller events, and six months or more for larger events.)

Past PRIM&R Regional Connections hosts have agreed to serve as mentors or sounding boards for those planning events. If you would like assistance from someone who has successfully planned a program, please contact us at 617.303.1875 or **membership@primr.org**.

2) Broadly outline the program for the event.

Begin to structure the event, considering the event timing and flow:

- Will your event require registration?
- Will your event be held outside the institution (see number five below)?
- Will your event require hotel accommodations?
- Will your event require a webpage on your website to house all necessary information (agendas, bios, registration, hotel, venue information, etc.)?
- Will you have a single speaker? A panel of speakers? Multiple sessions happening concurrently? A variety of sessions?
- How long will each session last?
- Will you provide breaks and/or meals for attendees?
- Will there be time for networking opportunities, e.g. receptions, special meal functions that facilitate networking, team-building activities, mentoring events, etc.?

3) Create an event budget.

- Determine funding sources available for your program.
- Complete the ***PRIM&R Regional Connections Application for Funding***
- Consider additional sponsors for the program.
- Decide if you will charge a registration fee.

4) Develop an event planning checklist and timeline.

- Brainstorm a list of all the tasks that must be completed to successfully conduct your event. Don't forget post-event items.
- Assign target dates for the completion of each task.
- Assign a staff member or volunteer to take responsibility for each task.
- Review your checklist periodically to ensure nothing is missing and that deadlines are being met.

Sample planning checklists and timelines can be found on pages seven and eight.

5) Locate a venue for your event.

Now that you have program objectives and a budget, begin looking for a venue. Depending on the needs of your event, possible venues include: a meeting space at your institution or at another local company, a local hotel that has meeting space, or a local restaurant or banquet facility. Please note that offsite events tend to be more expensive than onsite events.

6) Select speakers, send invitations, and finalize your program.

- Determine whom you would like to speak at your event.
    - Are they faculty within your institution, guest speakers from outside the institution, or members of your event planning team?
    - Will you use videoconferencing or Skype to have a "virtual" speaker if someone is unable to travel?
- Consider what benefits you can provide to your speakers, such as transportation, accommodations, or honoraria.
- Once you know who you'd like to invite, what their role in the event will be, and what you can offer to them in return for their time, send formal invitation letters outlining all this information.
    - Sample communication pieces for speakers are available upon request.
    - You may also find it helpful to start by calling potential speakers and then following up with an invitation.
- As your invited speakers confirm their participation, finalize the event's program. Sample agendas are available upon request.

7) Promote your event.

- Submit information about your event for posting on **PRIM&R's Events Calendar**.
- Consider multiple forms of marketing, such as email, advertising, postal mail, and others.
- Make sure your advertising pieces are attractive and give all the information needed for the attendee to make a decision. In addition, all event logistics and registration information should be clearly stated on all marketing pieces.
- Remember to include the PRIM&R logo/co-sponsorship information and submit all pieces to PRIM&R for review at least two weeks in advance of planned distribution.

8) Pay attention to details.

As the date approaches, start focusing on the details for your event:

- Review your budget to determine if it is still realistic or if additional funding may be necessary.
- Develop a system for tracking RSVPs or registrations.
- Make plans for various aspects of the event such as catering, audio-visual (AV) needs, meeting room and registration set-up, etc., and communicate these needs with the venue on a regular basis. It is recommended that all onsite meeting logistics be finalized at least two weeks prior to the event.
- Send an estimate of the number of attendees to PRIM&R at least two weeks in advance so we can send you PRIM&R materials for distribution at the event.
- Make sure you are providing adequate information for out-of-town or offsite attendees, such as directions, accommodations, etc.
- Keep a running list of materials that will be needed onsite so you are not scrambling for these materials at the last minute.
- If this is your first time running such an event, consider a dress rehearsal with event staff.

9) Hold your event.

To make sure everything runs smoothly on the big day, you should:

- Arrive early.
- Have a check-in desk for attendees ready at least 30 minutes before the event begins.
- Review the event site to ensure everything is ready to go, e.g. meeting room set-up, catering, AV, etc.
- Conduct sound and equipment checks.
- Work closely with the event venue staff.

10) Post-event follow up.

- Send thank you notes to attendees, speakers, volunteers, and vendors.
- If you did not do a paper evaluation onsite, send an electronic evaluation within 24 hours of the event's conclusion to all attendees, if appropriate. We are happy to provide you with a sample evaluation if needed.
- Conduct an event debriefing with pertinent stakeholders to determine both successes and ways to improve for the future.
- Finalize accounts receivable and/or accounts payable and prepare a final accounting of the event.

All PRIM&R Regional Connections grantees are required to submit, within 60 days of the event's conclusion, the following items to PRIM&R:

- ☐ A summary report, suitable for inclusion in the *PRIM&R Member Newsletter*. A sample report is available upon request.
- ☐ If applicable, a summary of the event evaluations
- ☐ An itemized list of expenses
- ☐ A final attendee list

Regional Connections

Suggested Topics

General Topics

- Accreditation of human research protection programs or laboratory animal care programs
- Administrator fundamentals
- Career development, continuing education opportunities, and certification
- Exempt and expedited research
- Fundamentals for new members and chairs
- Post-approval monitoring of research
- Preparing for the CPIA® or CIP® exam
- Quality improvement and quality assurance (QA/QI)
- Researchers and research staff education programs
- Reviewing student research

Or, consider having an event that focuses on current issues in animal care and use or human subjects protections or a topic of interest to your region

HRPP/IRB-Related Topics

- Applying the Belmont Principles
- Assessment Programs and Tools: Federal and Institutional
- Community-Based Participatory Research
- Data and Safety Monitoring Plans: The Investigator's and the IRB's Role
- Ethical and Regulatory Issues in Biobanking
- FDA and DHHS Regulations
- Handling Subject Complaints
- International Research Perspectives
- IRB Review of Emergency and Disaster Research
- Obtaining Informed Consent
- Privacy, Confidentiality, and Identifiability
- Qualitative Research: Considerations for IRB Review
- Research Involving the Internet: Ethical and Regulatory Issues
- Research Involving Vulnerable Populations
- The Role of the Local IRB in Multi-site Research

IACUC-Related Topics

- Animal Facility Inspections
- Balancing Animal Welfare and Regulatory Toxicology in Pre-Clinical Studies
- Disaster Planning and Crisis Management
- Ethical Issues Raised by Animal Research
- Improving Animal Care and Use Programs
- Industry and the IACUCs
- Pain Relief Before, During, and After Procedures
- Responding to Concerns and/or Criticisms Regarding the Use of Animals in Research
- The Nuts and Bolts of Protocol Review

Regional Connections

Budgeting Checklist

The following is a guideline of possible expenses that may be included in producing a successful event. But remember, every meeting is different. Use this list as a guide for determining what you'll need to plan for.

Marketing

- ☐ Design for print or online promotional materials
- ☐ Printing
- ☐ Postage for mailed announcements or invitations

Materials

- ☐ Registration forms
- ☐ Printed program schedule
- ☐ Name badges
- ☐ Office supplies
- ☐ Shipping costs
- ☐ Any printed materials speakers request be distributed during the event
- ☐ Any additional materials you plan to distribute

Program

- ☐ Temporary staff, if necessary
- ☐ Honoraria, gifts, and travel costs for speakers (including flights and hotel accommodations)
- ☐ Audio Visual costs
- ☐ Location rental costs
- ☐ Signage for location
- ☐ Food and beverage costs
- ☐ Translators, if necessary

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Regional Connections Planning Timeline

This timeline provides a checklist for your program. Adapt it to your own particular needs and establish your own set of due dates to ensure the success of your event.

In Advance

Program and Planning

- ☐ Develop a plan, including an objective, program, and budget for the meeting.
- ☐ Select a date, ensuring that the timing is clear of conflicting events, functions, or holidays.
- ☐ Assign tasks to specific staff members.
- ☐ Submit your finalized program to any appropriate accreditation bodies for continuing education credit.
- ☐ Determine whether you will require registration for the event.
- ☐ Create registration form and make available through appropriate avenues (e.g. hard-copy, online).
    - *Note: **Google Forms** is a free, easy-to-use online tool which can be used to track online registrations*
- ☐ Hire photographers/videographers, if needed.
- ☐ Monitor RSVPs, providing registered attendees with important information as the event nears.
- ☐ Communicate with all event staff and volunteers about responsibilities, meeting times, and event schedule.
- ☐ Monitor budget on an ongoing basis.
- ☐ Submit agenda with session descriptors if you want to be able to provide attendees with CIP® or CPIA® CEs.

Marketing and Materials

- ☐ Create a plan for advertising the event to research ethics professionals in your area.
- ☐ Notify PRIM&R if you would like us to send advertising materials to individuals in your area who are on our mailing list.
- ☐ Design and send outreach, either through email, hard-copy mail, or both.
- ☐ Send PRIM&R copies of all marketing materials for approval at least two weeks prior to planned distribution date.
- ☐ Finalize design for program and all other materials to be handed out onsite.
- ☐ Print all onsite materials.

Venue and Vendors

- ☐ Book meeting site, hotel rooms, and support services, e.g. catering, audio visual, decorating services, etc.
- ☐ If needed, reserve rental equipment such as tables, chairs, tents, podiums, etc.
- ☐ Finalize contracts with all vendors.
- ☐ Send AV needs to AV company or venue.
- ☐ Order food and beverage through the venue or a caterer.

Speakers

- ☐ Send potential speakers invitations, informing them of your meeting, the date and location, your attendees, their role in the meeting, what they will receive in return for their participation, guidelines for their presentation, and information on audiovisual capabilities.
- ☐ As speakers confirm, make travel arrangements (if necessary).
- ☐ Discuss the program, presentation content, and other pertinent information with confirmed speakers.
- ☐ Request AV needs from speakers.
- ☐ Obtain photographs and bios from speakers for use in marketing and event program.

1 Week Before

- ☐ Copy all important documents, presentations, etc. onto two flash drives.
- ☐ Ensure all materials have been or will be transported to the event location.
- ☐ Print attendee list for registration table or booth.
- ☐ Prepare registration packets and name badges.
- ☐ Communicate with AV company and venue regarding any last-minute needs.
- ☐ Confirm final numbers for food and beverage needs.
- ☐ Communicate with staff and volunteers regarding on-site duties.

Day of Event

- ☐ Arrive well in advance of event's start time.
- ☐ Bring all relevant materials and documents, including phone numbers for onsite staff, speakers, and vendors; schedule of events; registration materials; flash drives with backup copies of important documents; etc.
- ☐ Set up rooms, testing AV, slides, etc. in each.
- ☐ Check food and beverage availability.
- ☐ Greet and communicate with speakers as they arrive.
- ☐ Open registration table or booth at least 30 minutes before the start of the event.
- ☐ Follow the schedule you've developed, managing any unexpected situations as they arrive.
- ☐ Distribute and collect paper evaluations, if desired. Alternatively, evaluations can be sent out via email after the event.

Post Event

- ☐ Debrief with staff, speakers, and volunteers to determine ways to improve future events.
- ☐ Finalize billing and prepare final budget.
- ☐ Submit invoices to PRIM&R for amount granted.
- ☐ Send evaluation report, attendee list, and final accounting of event to PRIM&R.
- ☐ Submit a summary of the event to PRIM&R for inclusion in the *PRIM&R Member Newsletter* within 60 days of the event's conclusion.
- ☐ Thank speakers and attendees for their participation.