



AMERICAN OSTEOPATHIC ASSOCIATION

Phoenix, Arizona | October 22-24, 2021

OMED 2021 Annual Meeting Industry-Supported CME In-Person Symposium Guidelines

CME Symposia are a valued educational component of the OMED Annual Meeting. OMED offers several opportunities to hold these dynamic sessions, supported by educational grants and certified for AOA CME credit and *AMA PRA Category 1 Credit™* by the American Osteopathic Association (AOA). Medical educational/meeting management organizations are invited to submit proposals to conduct OMED CME symposia on topics that relate to the daily practice of physicians and their patients.

OMED is an annual medical conference bringing together more than 3,000 osteopathic physicians, medical students, and other health care professionals from across the country.

Quick Symposia Facts

- 90 Minute Timeslots are Available for In-Person Symposia
- Association Fee: \$50,000
- AOA and AMA Accreditation Fee: \$20,000
- Anticipated attendance: 250-350 OMED attendees
- Applications due July 30, 2021

Before You Submit for Grant Funding...

The OMED CME Symposia Guidelines are designated to provide comprehensive information to organizations that wish to hold a symposium at the OMED Conference. It is important for all organizations, even those who have worked with OMED on symposia before, to **thoroughly read these guidelines prior to initiating any grant requests for a symposium, including responses to Requests for Proposals (RFPs) from any commercial interests/ineligible companies.** Should there be any questions or additional information needed, please do not hesitate to contact the AOA for assistance.

All requests will be filled on a first-come, first-serve basis.

Proof of confirmed funding is due when the application is submitted.

BENEFITS OF CONDUCTING AN OMED CME SYMPOSIUM

All accepted CME symposia will be assigned to a room in a specified venue during times that do not conflict with OMED's in-person education session activities and in-person exhibits. OMED promotes all industry supported CME symposia to registered attendees and potential registrants.

YOUR INNOVATIVE, PATIENT-CENTRIC SYMPOSIUM WILL HAVE:

1. Access to more than 3,000 osteopathic physicians, residents, medical students, and other health care professionals seeking to increase their medical knowledge, competence, and performance.
2. CME Accreditation for AOA and *AMA PRA Category 1 Credit™* by the AOA.
3. Ongoing program listing with program overview, faculty bios, and learning objectives in the digital OMED program.
4. Ongoing program listing with learning objectives and faculty bios in the OMED mobile app.
5. Branded signage displayed in appropriate areas.

In addition, companies conducting a CME symposium activity can also purchase marketing opportunities including:

1. E-Alert marketing to OMED registrants.
2. Social media postings.
3. Inserts in registration bag and conference schedule available.
4. Special marketing packages available.

Please contact Darcy Steinberg-Hastings at dsteinberg@osteopathic.org and Walter Wachel at wwachel@osteopathic.org to discuss options and pricing.

SUMMARY OF ROLES AND RESPONSIBILITIES

Responsibilities	AOA	Symposia Partner
Develop program proposal and budget for grant request.		x
Submit grant request directly or authorize applicant to submit on behalf of the AOA.	x	x
Complete and submit a CME Symposium Application along with proof of funding.		x
Sign a Project Management Agreement generated by the AOA outlining payment schedule and agreed upon milestones.		x
Review and approve symposium grant request.	x	x
Budget for and host the assigned program food function managing all on-site logistics.	x	x
Provide meeting space for symposium and pre-program food function with standard room set-up (solely determined by the AOA) to accommodate maximum attendance (on average 250-350 attendees).	x	
Provide CME Accreditation for the Program (all symposia must be accredited by the AOA). Programs are eligible for 1.50 AOA Category 1-A credit and 1.50 <i>AMA Category 1 Credit™</i> unless otherwise approved by the AOA.	x	
Provide hotel/or convention center contacts, AV, and all other vendor contacts to facilitate logistical execution for symposium unless otherwise directed by the AOA.	x	
Work with the AOA-approved vendors to purchase AV, F&B, Electrical and any additional requirements to execute the symposium as it was presented to and approved by the grantor.		x
Manage educational grant from commercial supporter and distribute funds to the symposia partner per established budget upon achievement of required milestones.	x	x
Provide a meeting space for slide review on premises if facility can accommodate this space.	x	
Develop and produce all required print materials for program including brochure/mail piece, signs, syllabus/meeting materials and evaluation, in addition to any optional advertising. All print materials are subject to AOA approval.		x
Provide all required CME information to the AOA on or before specified deadlines in order for the AOA to accredit program (i.e., faculty forms, program information, executed LOA with AOA as a signatory, etc.).		x
Coordinate and budget for all shipping/receiving of program materials, faculty travel and accommodations, slide review needs, distribution and collection of attendee materials (i.e., syllabus, evaluations), etc.		x

Reference each symposium in official OMED publications– (the OMED web site as well as be promoted on OMED signage at the annual meeting); provided information is submitted by AOA deadlines.	x	
Review and approve all printed materials, both required and optional, including brochures and advertisements, signage, syllabus, etc.	x	
Provide up to 4 lead retrieval units and 4 staff for scanning at each Symposium.	x	
Reconcile all program expenses based on original budget per supporting company requirements and provide the AOA with copies of reconciliation submission (i.e., online print outs and/or screen shots).		x
One complimentary mailing list. Mailing piece must be approved by the AOA.	x	

PROGRAM PROCESS AND REQUIREMENTS

Grant Request Authorization:

The AOA will advise the symposia partner regarding grant request submission process, either authorizing the symposia partner to proceed or, if the commercial interest listed requires that the request come directly from the accredited provider, the symposia partner will have to provide the AOA with the information for the grant request, exactly as it is to be entered/uploaded, so that it can be submitted under the AOA's user profile. Note that if it is necessary for the AOA to submit the grant, the symposia partner should allow 5-7 business days for AOA staff to complete the grant request once all necessary information is received. Every effort will be made to submit grants promptly; however, a faster turnaround cannot be guaranteed. If authorized to submit grant request directly, the symposia partners are required to provide the AOA with copies of all grant request submissions, (i.e., online forms, screen shots, uploaded attachments, etc.) and grant number or other tracking information.

All grant requests must properly list the AOA as the sole accredited provider for the program and also the payee for the grant. **The AOA cannot accept grants, Letters of Agreement, and/or CME Symposium Applications with alternate provider/payee information, so it is critical that grant requests are properly submitted.**

CME Symposium Application:

Upon receipt of a grant approval from the commercial supporter, symposia partners may submit their completed CME Symposium Application and required attachments, including the grant LOA for AOA signature (note that in the case of electronic acceptance agreements, the LOA must still be submitted to AOA first for online acceptance authorization).

OMED Staff will advise if any application components are missing as incomplete applications are not accepted. Symposia partners may also be advised if any of the proposed faculty is also confirmed for

other sessions at the OMED Annual Meeting as OMED does limit the number of appearances an individual can make on the Annual Meeting Program.

Complete applications will be reviewed by the AOA. Please allow 5-7 business days for AOA staff to review.

Approval Notice and Faculty Confirmations:

Symposia partners will be notified once their symposium is approved and advised regarding the faculty selected by the AOA. Additionally, they will be provided with their time slot assignment.

Symposia partners should immediately contact the approved faculty and confirm their participation. If a faculty member is unavailable or declines the invitation, the symposia partners must contact the AOA with replacement recommendations for approval.

CME Submission Requirements:

AOA requires that all activities be submitted for accreditation **no later than three months prior to the start of the activity**. Exceptions may be granted and will be reviewed on a case-by-case basis. In order to receive AOA 1-A CME there must be 30% of the total content presented by a DO.

All CME information must be submitted to the AOA Director of Physician Education and CME. Timeline for submission and further CME guidance will be provided to symposia partners once symposia are approved.

Print Materials and Signage:

AOA must approve all program materials (print, digital, or other media) prior to production and distribution. AOA will provide content requirements for all program materials upon initial symposium approval.

At least 2 signs for on-site use will also be required from the joint provider. Sign proofs must be submitted to the AOA for approval and allow 3-5 business days for review and response.

Additional advertising opportunities are available for symposia including ads in OMED 2021 publications and meeting specific print materials. While optional these items must still be approved by AOA prior to publication.

Syllabus & Presentation Slides:

Symposia partners are required to produce a syllabus for their symposium to be made available to attendees either onsite or post event. As with all other print materials, the syllabus must be approved by AOA and content requirements will be provided to the symposia partner upon initial symposium approval. Syllabus proofs must be submitted to AOA for approval and allow at least 7-10 business days

for review and response. Submitted with the syllabus proof, either in the same document or separate, should also be the activity evaluation, which must also be approved by AOA.

Post Program Documentation & Budget Reconciliation:

AOA requires that symposia partners submit a summary report of the attendee evaluations and any other outcomes reporting resulting from their symposium. Reports should be submitted by the stated deadline; however, if longer-range outcomes measurements are being conducted, the symposia partner must advise AOA as to the timeline and reports should be submitted upon completion.

Additionally, the symposia partner must reconcile all program expenses based on the original symposium budget and provide a copy of their reconciled budget to AOA. As with the original grant request, if the symposia partner was authorized to submit the grant directly, then they will also be required to submit the necessary grant reconciliation directly to the supporter and provide copies of their submission to AOA (i.e., online forms/screen shots, uploaded documents, etc.). If it was necessary for AOA to submit the grant request, then the symposia partner will need to follow the same protocol for the reconciliation, providing AOA staff with the information exactly as it is to be entered/uploaded and again, a minimum of 5-7 business days should be allotted for AOA staff to complete the submission.

FINANCIAL POLICIES AND MILESTONES

In accordance with AOA Standards for Integrity and Independence in Accredited Continuing Education, it is AOA’s policy that all funds and support associated with a CME activity, whether in the form of an educational grant or not, must be given to the accredited provider (AOA). Live activity funds will be distributed to the symposia partner upon achievement of the two required milestones listed below. Payments to the joint provider, regardless of milestone achievement, can never exceed the balance of funds received by AOA from the commercial supporter(s).

Milestone 1; Submission of all CME requirements (objectives, needs assessment, agenda, faculty forms, and CVs, etc.)

- 90% of live activity grant, less AOA fees.
- Funds will be distributed upon receipt from the commercial supporter(s) – if less than 90% received at time of milestone achievement, remaining balance will be paid immediately upon AOA receipt of funds.

Milestone 2; Submission of post-program documentation and budget reconciliation

- Up to 10% of live activity grant—exact amount based on final budget reconciliation.
- AOA will retain any unused grant funds for return to the commercial supporter(s).

If the commercial supporter’s payment schedule is 100% upon signing the LOA, AOA will hold the funds for the symposia partner until the post program requirements are completed.

Cancellation Policy

AOA has established a cancellation policy for OMED CME Symposia as follows:

- The third-party symposia partner is required to provide confirmation in writing from the supporter or the supporter’s grants office that the supporter has officially approved the program.
- In the event that the symposia partner has not provided confirmation in writing from the supporter or the supporter’s grant office, and the supporter chooses not to provide support for the program at any time, AOA will charge a cancellation fee of 25% to the third-party joint provider.
- Supporter will be charged a 50% fee if canceling satellite symposia 90 days or less prior to the scheduled providing a replacement satellite event is scheduled.
- **Cancellation notice received less than 90 days prior to the live event and no replacement symposium is scheduled will not receive a refund.**

LOGISTICAL INFORMATION

Standard Program Format:

The standard program format for AOA symposia is to have 1-3 presenting speakers delivering content for up to 90 minutes including Q&A. Other formats may be accepted upon AOA review and approval.

All symposia will be preceded by a modest food function and AOA symposia time slots are scheduled to allow additional time beyond the 1.50 hours on the agenda to accommodate this function.

Meeting Space & Time Slots:

Meeting rooms for symposia will be provided by AOA. The food function and educational session will be in the same room with set-up per AOA specifications. Based on room size and AV space requirements each room is expected to accommodate approximately 350 people.

There are multiple time slots for symposia – dates and times are as follows:

Friday	October 22	6:00-7:30 AM
Saturday	October 23	6:00-7:30 AM
Sunday	October 24	6:00-7:30 AM
<i>Additional timeslots per day can be added for an additional fee.</i>		

Please note – should additional symposia applications be approved once existing slots have been filled, AOA may choose to hold additional symposia that may run concurrently and/or create new slots on alternate days/times to accommodate the added symposia. Meeting space for additional symposia will be provided either at the host hotel or alternate venue as determined by AOA (e.g., convention center).

Attendance:

The estimated total meeting attendance is 3,000+. Note that participation levels for symposium can vary with past numbers ranging from 250-350+ for a single session. While attendance is consistently robust, it is also driven by the educational subject matter of the symposium.

Upon request, AOA will provide regular updates to the symposia partners regarding the pre-registration numbers for the overall meeting. This information is provided to assist for planning purposes only – symposia are not ticketed events and seating is on a first come, first serve basis (OMED attendees are very familiar with this process). Please note, the AOA does not “pre-register” Symposia Attendees for these events nor is it suggested that this be done as a measure to anticipate attendance.

Lead Retrieval:

OMED will provide up to 4 lead retrieval units from AOA’s exclusive meeting vendor to capture attendee data and attendance numbers for their symposium. In addition, up to 4 staff/temps will be provided to assist with crowd control and scanning.

AV Service:

As stated in the summary of roles and responsibilities, the Symposia partners are financially responsible for all AV costs associated with their symposium. Please budget a minimum of \$20,000 for Symposium AV. Please note that all Audience Response Systems (ARS) need to be coordinated with the AV vendor prior to the meeting– no outside equipment may be used unless exclusively approved by the OMED AV vendor.

BUDGET INFORMATION

Symposia partners are responsible for developing a budget to cover all the required elements of their symposium as well as any added components or enhancements and their program management/service fees.

The following items are required components for AOA symposia that all symposia partners must include in their budgets:

Accreditation (\$20,000) & Association Fee (\$50,000)

- Includes CME review and accreditation for the symposia session, plus management of the evaluation, attestation and issuance of CME certificates.
- Includes meeting space, room set, promotion in all OMED related publications and onsite signage where appropriate, as well one member of the AOA to act as Liaison between the symposia partner and all vendors where deemed necessary.

Faculty Honoraria – Symposia partner to Determine Cost

- Customary faculty honorarium levels for symposia are as follows (and approximations):
Speakers: \$2,500 - \$3,000 each
Chair: \$3,000 - \$3,500 each

Faculty Expenses – Symposia partner to Determine Cost

- All symposia faculty are to be provided with reasonable reimbursement of transportation, accommodation, meal, and other travel-related expenses related to their participation. Symposia partners will be responsible for providing any required transparency report per the grant agreements.

AOA Display Signage for CME Symposium – Symposia partner to Determine Cost

- Symposia partners are required to produce at least two (2) signs that can be used on-site for their program.

Syllabus/Meeting Materials – Symposia partner to Determine Cost

- Symposia partners are strongly encouraged to create a syllabus that be made available to attendees in a printed format onsite and/or as an electronic download during and post event.
- Symposia partners will be required to provide AOA with a copy of meeting materials in a PDF format.

Food Function – Symposia partner to Determine Cost

- Symposia partner is required to provide a modest food function.
- Menu selections should include options to accommodate vegetarian requests.

Additional Services

In addition to the required expenses above, symposium budgets should include the fees and/or costs for the joint provider's services along with other enhancements or additional components the symposia partner elects to add to the symposium. These additional elements may include, but are not limited to:

Audio Visual Equipment and Services

- Symposia partner is responsible for all AV costs.
- Additional equipment including confidence monitors, microphones, enhanced lighting, etc.
- Additional services including video recording, audio recording, etc.
Audience Response System

**ALL EQUIPMENT AND SERVICES MUST BE PURCHASED FROM/
APPROVED AOA'S EXCLUSIVE AV VENDOR**

Advertising

In addition, companies conducting a CME symposium activity can also purchase the following:

1. E-Alert marketing to OMED registrants.
2. Social media postings.
3. Inserts in registration bag and conference schedule available.
4. Special marketing packages available

Please contact Darcy Steinberg-Hastings at dsteinberg@osteopathic.org and Walter Wachel at wwachel@osteopathic.org to discuss options and pricing.

Faculty Slide Review

- AOA does provide a Faculty Slide Review meeting space if enough room is available at the host facility.

Enduring Materials

- Enduring materials developed as a spin off to their AOA symposium must also be accredited by the AOA — they are separate activities with their own approval process and fee structure.
- Live symposia and enduring materials should each have their own activity budgets, even if being submitted in the same grant.

ENDURING MATERIALS

While both the live and enduring activities may be approved by a single grant from a commercial supporter, they are each a separate medium of learning. Therefore, all enduring materials undergo a separate review and approval process.

AOA welcomes enduring activities to enhance the educational reach of the symposia presented at our Annual Meeting. Like the live symposia, enduring material spin-off activities are directly accredited by AOA for dual credit.

The AOA offers multiple enduring options to complement CME Symposia and we encourage you to explore them as they directly reach an extended DO audience of thousands — details are available upon request.

Symposia partners must indicate on their request form if any enduring material spin-offs are being developed from their live activity and if so, indicate whether funding is being requested for the live and enduring together or via separate grant requests. As noted previously, symposia partners may not submit grant requests to any commercial interests without authorization from AOA – this includes requests for enduring materials.

Enduring materials (AOA Webcast – audio and slides from live symposium)

AOA cost for webcast posting and promotion, development of visual theme for web page and promotion materials. Includes CME certification and certificates, CME review and approval, marketing, online posting services (up to 18 months), guest editor honorarium.	\$60,000
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AOA Contacts:

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AMERICAN **OSTEOPATHIC** ASSOCIATION

Phoenix, Arizona | October 22-24, 2021

Industry-Supported CME Symposium Application

Please return this form by July 30, 2021

Submit application to Darcy Steinberg-Hastings,
dsteinberg@osteopathic.org and Walter Wachel,
wwachel@osteopathic.org

All requests will be filled on a first-come, first-serve basis.

Proof of confirmed funding is due when the application is submitted.

Provide contact information for CME Symposium Organizer:

Name _____

Organization _____

Address _____

City _____ State _____ Postal Code _____

Country _____ Email _____

Phone _____ Fax _____

Provide Industry Supporter information to whom grant support will be requested:

Name _____

Organization _____

Address _____

City _____ State _____ Postal Code _____

Country _____ Email _____

Phone _____ Fax _____

Timeslot Selection

If you are interested in reserving a session slot for a particular day, please indicate your top 3 preferences below:

Friday	October 22	6:00-7:30 AM
Saturday	October 23	6:00-7:30 AM
Sunday	October 24	6:00-7:30 AM
<i>Additional timeslots per day can be added for an additional fee.</i>		

Are you interested in:

1. E-Alert marketing to OMED registrants.
2. Social media postings.
3. Inserts in registration bag and conference schedule available.
4. Special marketing packages available

Please contact Darcy Steinberg-Hastings at dsteinberg@osteopathic.org and Walter Wachel at wwachel@osteopathic.org to discuss options and pricing.

Are you interested in:

- Producing an enduring web archive of the satellite symposium with the AOA

Enduring materials (AOA Webcast – audio and slides from live symposium)

AOA cost for webcast posting and promotion, development of visual theme for web page and promotion materials. Includes CME certification and certificates, CME review and approval, marketing, online posting services (up to 18 months), guest editor honorarium.	\$60,000
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Symposium Details

Symposium Title:
Topic Description:

Learning Objectives (provide 3 learning objectives for this session):

Objective #1:
Objective #2:
Objective #3:

Please list the topics, chairs, and speakers proposed for this symposium.

Topic	Speaker Name/Institution	City, State, Country

If you have any questions or if you do not receive an email acknowledging receipt of application within 72 hours of submission, email immediately or call:
Darcy Steinberg-Hastings, dsteinberg@osteopathic.org and Walter Wachel, wwachel@osteopathic.org
or (312) 202- 8178