



**Oncology Nursing  
Society**

# Chapter Conference Toolkit

Hosting a Full -or Half-Day Chapter Event

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Links to Additional Toolkit Resources

- [Continuing Education Toolkit](#)
- [Certificate of Insurance](#)
- [Chapter Website Handbook](#)



## Success Metric: Chapter Conference

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This toolkit provides information on the *Chapter Conference* success metric. To complete this success metric, your chapter must host either a full or half-day event that provides a combination of networking, education, and/or opportunities for vendor interaction.

## What is a Chapter Conference?

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A conference or symposium is a half or full-day event for chapter networking and education, often with NCPD available. These events may also include a vendor fair.

A vendor fair component raises funds for your chapter's activities and expenses and provides a networking opportunity for members to learn about oncology care advancements. Chapters profit from vendors paying for table space and attendee registration fees.

## Suggested Timeline

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### 12 – 10 Months Prior:

- ☐ Establish the date for your event and reach out to venues. Many venues fill up in advance, so it's important to get on their calendars early.
- ☐ Delegate event responsibilities.
- ☐ Compile an estimated budget.
- ☐ Discuss potential topics, speakers, and venues.
- ☐ Select venue and sign contract (if applicable).
- ☐ Compile a list of potential vendors and speakers.

### 9 – 6 Months Prior:

- ☐ Send vendor request (if applicable).
- ☐ Compile a list of potential topics and speakers/presenters (if applicable).
- ☐ Reach out to potential speakers/presenters (if applicable).
- ☐ Reach out to NCPD approver or provider (if applicable).

### 5 – 3 Months Prior:

- ☐ Secure caterer and plan menu (if applicable).
- ☐ Finalize speakers/presenters and schedule.

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- ☐ Compile information for CNE approver/provider (if applicable).
- ☐ Distribute a Save the Date to membership.
- ☐ Determine admission price and compile registration form/website.
- ☐ Open registration to membership. Promote via e-mail or mailing.
- ☐ Distribute flyers to local hospitals, schools of nursing, etc.

### 2 Months Prior:

- ☐ Send registration reminder to membership.
- ☐ Finalize vendors.
- ☐ Finalize speakers and coordinate travel (if applicable).
- ☐ Finalize layout and logistics with venue (tables, tablecloths, etc.)
- ☐ Publicize event on social media.

### 1 Month Prior:

- ☐ Plan vendor layout.
- ☐ Send vendor confirmations.
- ☐ Send registration reminder to membership.
- ☐ Reconfirm with speakers (if applicable).

### 1 Week Prior:

- ☐ Send attendee information.
- ☐ Print name tags (if applicable).
- ☐ Create a volunteer schedule for board members.

### Day of Event:

- ☐ General setup (tables, signage, etc.)
- ☐ Collect registrations.
- ☐ Clean up (post-event)
- ☐ Deposit checks or cash (post-event).

### 1 Week After:

- ☐ Send vendor thank you notes.
- ☐ Financial report to board on overall event.

## Responsibilities

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The chapter board is responsible for undertaking or delegating all the tasks that come along with the planning and execution of a conference/symposia. If the chapter wishes, they can designate a specific Program Chair as one of their three mandatory elected board positions. If the chapter



already has met the quota for elected positions, they can choose to appoint a Program Chair or form a Program Committee to oversee the event.

To establish accountability and ensure a successful program, it is important that all tasks necessary for the conference/symposia are assessed early on and assigned to capable volunteers. Just because someone has been elected Program Chair does not mean they must be entirely responsible for the event – it takes a village! Try assigning duties in areas of strength; for example, have the Treasurer handle the financial components of registration, have your most creative board member draft up promotional flyers, etc. Below, please find a list of some main responsibilities to aid in delegating specific tasks:

- **Registration** (setting up registration on website, mailing registration forms, etc.)
- **Marketing** (sending e-mail blasts, posting flyers, etc.)
- **Paperwork and Contracts** (applying for NCPD, speaker contracts, etc.)
- **Finances** (handling finances, writing checks, distributing W-9 forms, etc.)
- **Event Layout** (deciding table layout, assigning rooms for specific activities, etc.)
- **Event Schedule** (determining the schedule of events, etc.)
- **Vendor Relations** (reaching out and securing vendors, keeping vendors updated on event information, etc.)
- **Venue and Catering** (securing the event venue, planning any catering, etc.)

## Event Planning

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### Establishing Dates

It is important to establish the date for your vendor fair well in advance to allow enough time for planning. It is recommended to try to choose the date for your conference **9-12 months in advance**.

Generally speaking, conferences are held in the spring or the fall. This allows the chapter to avoid the summer holidays (when many members are on vacation), and the winter months (which have inclement weather in some parts of the country). Chapters tend to host their events on Saturdays, to accommodate their members' schedules.

It may be helpful to contact your neighboring chapters to ensure that your conference is not competing with a similar event in the surrounding area. For neighboring contacts, please reach out to [chapters@ons.org](mailto:chapters@ons.org).

## Venue

Once the date and estimated attendee count are established, you can begin scouting for event venues. It's important to consider things like traffic, parking, and proximity to your membership when deciding upon a venue. The first course of action is look within your membership – does anyone work at an institution with an appropriate event space? Many chapters can have their venue donated by a local hospital or institution. If you're unable to secure a venue for free, there are several other options to pursue. The average chapter spends around \$1,100 on space rental from any of the following:

- Hospitals
- Hotels
- Restaurants
- Country Clubs
- Meeting/Conference Centers

The most important aspect of choosing a venue is ensuring that it has enough space for your needs but also complies with pharmaceutical guidelines if you choose to offer CNE contact hours. See the sections on Vendor Requirements and Continuing Nursing Education for more information.

## Cost and Budget

It's very important to compile an estimated budget before you delve into the planning of your conference/symposia. Having a rough idea of your revenues and expenses can help you make decisions throughout the planning process.

The ONS National office conducted a survey in 2018 to get a better idea of the financials of chapter conferences across the country. Here were the ranges and averages that resulted from that survey:

Measurement	Range (Low → High)	Average
Number of Attendees:	25 → 225	67
Number of Members:	15 → 120	47
Number of Non-Members:	0 → 100	18
Cost for Members:	Free → \$65	\$9
Cost for Non-Members:	Free → \$75	\$12
Cost for Students:	Free → \$55	\$4
Number of Vendors:	6 → 60	\$20
Price per Table:	\$200 → \$2,000	\$737
Cost for Venue:	Free → \$5,000	\$1,134
Estimated Revenue:	\$1,000 → \$54,000	\$11,610

The main factor to consider when planning for your vendor fair is the number of attendees you will have. While this can be difficult to predict for your first event, this information is crucial in deciding how much space you should book, how many vendors you should invite, and how much you should charge. The more attendees you anticipate, the more vendors are willing to pay for a table.

## Additional Logistics

There are several important logistical issues to consider and discuss with the venue prior to the event. These include:

- **Space:** It is important to determine early on how much space is available for vendors. Determine the amount of tables that will fit in the room before opening vendor registration – this will prevent overselling spaces. If renting a professional venue, ask if they could provide you with a simple floor plan with a table layout, or create a basic version on your own.
- **Electricity:** Some venues will allow for electricity at vendor booths, and some may not. Ensure that you are aware of the venue's capabilities before offering electricity to vendors. The venue may need to place vendors with electricity in specific areas of the space.
- **Traffic Flow:** Some booths will draw more of a crowd than others – if you anticipate a booth being popular, try to space it away from other popular booths to prevent pooling of attendees in certain walkways.
- **Registration:** Will registration take place outside of the space, or inside? Is the venue able to provide a designated registration table, or will your chapter need to rent or provide their own? Make sure to discuss these details with your venue or make these decisions ahead of time with your chapter board.
- **Internet:** Determine whether wireless internet is necessary for your event and discuss internet capabilities with the venue. If WiFi or hardline internet is a possibility, consider offering it as an option to your vendors (at an additional cost).

# Vendors

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In included, a large portion of revenue from chapter conferences comes from the vendor aspect – sponsors paying to attend your event and display their product or company information.

## Pharmaceutical Vendors

Pharma vendors are often the “bread and butter” of a chapter vendor fair. Many of you probably already have contacts in pharma, whether they’re members of your chapter, or you’ve worked with them on dinner programs in the past. Please note that pharmaceutical vendors need to be a room separate from any CNE presentations.

Below, you can find a list of oncology-related pharma companies to reach out to with vendor requests. Please note that this list is not comprehensive. Always make sure you ask about the individual guidelines of each company – they can vary between organizations.

- ☐ AbbVie
- ☐ Amgen
- ☐ Astellas
- ☐ AstraZeneca
- ☐ Bayer
- ☐ Biologics, Inc.
- ☐ Bristol-Meyers Squibb
- ☐ Celgene
- ☐ CVS
- ☐ Eisai
- ☐ Genentech
- ☐ Gilead Sciences
- ☐ Ipsen Pharmaceuticals
- ☐ Lilly Oncology
- ☐ Merck
- ☐ Novartis
- ☐ Pfizer Oncology
- ☐ Sanofi
- ☐ Taiho Oncology
- ☐ Takeda Oncology
- ☐ TESARO
- ☐ Walgreens



## Additional Vendors

Many chapters choose to open tables to local companies or nonprofits – sometimes at a reduced rate (depending on the organization). Some organizations also may be willing to “swap” tables – giving the chapter a free table at an upcoming event in exchange for a free table at your vendor fair. Often, these are organizations related to oncology, but it is also acceptable to have tables from other organizations that might interest your members. These can include, but are not limited to:

- ☐ Home Health Care Organizations
- ☐ Hospice Organizations
- ☐ Genomic Testing Companies
- ☐ American Cancer Society
- ☐ Specialty Pharmacies
- ☐ Schools of Nursing
- ☐ Hospitals
- ☐ Cancer Support Groups
- ☐ Leukemia & Lymphoma Society
- ☐ Cancer Equipment Companies
- ☐ Prosthetic Companies
- ☐ Acupuncture
- ☐ Massage Therapy
- ☐ Be the Match
- ☐ Personal Interest Organizations (cosmetics, jewelry, Tupperware, etc.)

## Vendor Requirements

When working with vendors, especially those in pharma, it is important to understand and do your best to accommodate the guidelines that they are bound to operate under. Always ask a vendor if they have any special requirements or restrictions. It is also helpful to keep yourself informed on pharma’s Code on Interactions with Healthcare Professionals, which can be found [here](#).

This document outlines the rules pharma reps must follow regarding NCPD, meals, etc. Please note that many vendor fairs offering meals or NCPD need to have two rooms with independent entrances to provide the necessary separation for some pharmaceutical guidelines.

Different vendors may have different requirements when it comes to required forms and paperwork. For example, many pharmaceutical companies may ask you to sign a contract and submit a W-9 form for their records. Always be sure to review any contracts diligently, preferably with more than one board member present.

## Vendor FAQ

Below are some of the questions chapters may frequently receive from potential vendors:

**Is ONS a nonprofit organization?**

Yes, ONS and all of its chapters are 501(c)6 nonprofit organizations, under the tax code of the IRS. For copies of ONS's Articles of Incorporation or Tax Status Determination Letter, contact us at [chapters@ons.org](mailto:chapters@ons.org).

**Are contributions to our chapter tax deductible?**

Contributions to ONS and its chapters are not tax deductible.

**What is your chapter's EIN number?**

Each chapter has an individual Employer Identification Number (EIN) issued by the IRS. If you are unsure of your chapter's Employer Identification Number, please contact us at [chapters@ons.org](mailto:chapters@ons.org). Your chapter's number is separate from that of ONS national.

## Continuing Education (NCPD)

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For more detailed information, please see the [Continuing Education Toolkit](#).

Vendor fairs put on by chapters have the option to have a continuing education component to help draw traffic and generate funds. Current chapters offer anywhere from 1-8 contact hours, with the average chapter offering around four hours of CNE.

There are a number of organizations accredited by the American Nursing Credentialing Center to approve individual applications for continuing nursing education. Most approver units are part of state nursing organizations, many of which will approve programs held in other states. You can find a list on the American Nursing Credentialing Center (ANCC) website at <https://www.nursingworld.org/organizational-programs/accreditation/find-an-accredited-organization/>

You could also contact an accredited provider or approved provider in your area to see whether they would be interested in jointly providing your program. Joint providing is when two or more organizations work together to plan an educational activity. The provider of the activity is the organization that awards contact hours, and, in this case, the chapter would be the joint provider.

Common providers are hospitals/hospital systems and schools of nursing. The fee for providers and approvers varies but is generally based on the number of contact hours that are being requested.



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Be sure to check with the approver or provider for time frames, required information, and the format in which you will need to submit your application – this will ensure you have the information required by them when needed. Providers and approvers may require some or all of the information below (adapted from ANCC criteria):

- ☐ Event Information (title, location, format, date)
- ☐ Nurse Planner name and credentials
- ☐ Rationale for program
- ☐ Description of the target audience
- ☐ Desired learning outcomes
- ☐ Description of evidence-based content with supporting references or resources
- ☐ Learner engagement strategies
- ☐ Description of evaluation method
- ☐ Names and credentials of all individuals in a position to control content
- ☐ Conflict of Interest (COI) forms for all individuals in a position to control content

## Event Registration

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Using the Events feature on your chapter site, members (or non-members) can register and pay directly on your chapter website. In addition, you're able to collect separate registration for vendors. Some best practices:

1. Ensure your chapter has a PayPal account to accept online payments. You can set up a chapter PayPal account [here](#), or by visiting the PayPal website.
2. You can find the instructions for linking your PayPal account and creating a chapter event on your site [here](#). For a vendor fair, the Event Type "Chapter Event (Advanced Registration)" is generally recommended. This allows for both Early, Regular, and Late registration categories, as well as Member and Non-Member Pricing. Additionally, member can opt to forgo payment during the online registration and bring a check to the event, if desired.
3. There is a separate "Vendor Only Registration" category in the chapter events section – if you would like to collect payment from vendors via the site, a separate event can be created with this registration type.

If you have any questions or need any assistance in formatting or setting up a chapter event registration on your virtual community, please contact us at [chapters@ons.org](mailto:chapters@ons.org).



# Sample Conflict of Interest Form

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Below is an example Conflict of Interest Form for presenters/speakers.



Chapter: \_\_\_\_\_

Event: \_\_\_\_\_

Date: \_\_\_\_\_ Location: \_\_\_\_\_

## 1. Employment or Leadership Position:

List each entity in which you or an immediate family member currently holds any full- or part-time employment or serves as an officer or board member for an entity having an investment, licensing, or other commercial interest in the science or practice of oncology.

- ☐ I do not have an employment or leadership position to disclose.
- ☐ I have an employment or leadership position to disclose:

\_\_\_\_\_

## 2. Consultant or Advisory Role:

List each entity in which you or an immediate family member currently holds or has held any consultant or advisory arrangements with an entity having an investment, licensing, or other commercial interest in the science or practice of oncology for which services were performed or payment was made during the past 12 months.

- ☐ I do not have a consultant or advisory role to disclose.
- ☐ I have a consultant or advisory role to disclose:

\_\_\_\_\_

### 3. Stock Ownership:

List each entity in which you or an immediate family member currently holds >5% ownership interest in any entity (publicly traded or privately held) that has an investment, licensing, or other commercial interest in the science or practice of oncology. You do not have to disclose ownership in diversified funds that are not controlled by you or an immediate family member.

- ☐ I do not have stock ownership to disclose.
  - ☐ I have stock ownership to disclose:
- 

### 4. Honoraria:

List each entity in which you or an immediate family member has been paid directly any honoraria (reasonable payments for specific speeches, seminar presentations, or appearances) during the past 12 months by any entity having an investment, licensing, or other commercial interest in the science or practice of oncology.

- ☐ I do not have honoraria to disclose.
  - ☐ I have honoraria to disclose:
- 

### 5. Research Funding:

List each entity in which you or an immediate family member currently conducts any clinical research project(s) funded in whole or in part by an entity having an investment, licensing, or other commercial interest in the science or practice of oncology.

- ☐ I do not have research funding to disclose.
  - ☐ I have research funding to disclose:
- 

### 6. Expert Testimony:

List each entity in which you or an immediate family member has provided expert testimony during the past 12 months, where the testimony given relates to the science or practice of oncology.

- ☐ I do not have expert testimony to disclose.
  - ☐ I have expert testimony to disclose:
-

**7. Other Remuneration:**

List each entity in which you or an immediate family member has received any trips, travel, gifts, or other in-kind payments during the past 12 months from an entity having any investment, licensing, or commercial interest in the science or practice of oncology. You do not have to disclose payments that are directly related to research.

- ☐ I do not have other remuneration to disclose.
- ☐ I have other remuneration to disclose:

\_\_\_\_\_

**To the best of my knowledge and belief, the above information is true and accurate.**

**Signature:** \_\_\_\_\_

## Sample Event Budget

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Revenues	Number	Fee	Amount
Estimated Number of Vendors	20	\$750.00	\$15,000
Estimated Number of Members	48	\$10.00	\$480
Estimated Number of Nonmembers	18	\$15.00	\$270
Total Revenues			\$15,750

Expenses	Number	Price per Item	Amount
Honoraria	1	\$500.00	(\$500)
Venue Rental	1	\$1,100.00	(\$1,100)
Catering	1	\$900.00	(\$900)
Postcards	100	\$0.60	(\$60)
Postage	100	\$0.50	(\$50)
Flyers	50	\$0.30	(\$15)
Door Prizes	3	\$75.00	(\$225)
Misc. Supplies	1	\$50.00	(\$50)
Total Expenses			(\$2,900)

Profit	Amount
Revenues	\$15,750
Expenses	(\$2,900)
Profit	\$12,850

# Sample Speaker Contract

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## [CHAPTER NAME] SPEAKER CONTRACT

This **SPEAKER CONTRACT** for the personal services of an individual to speak at the event to be described below, is made between the board of the [chapter name], for and on behalf of the members of the chapter and the undersigned speaker, (hereinafter called the "Speaker"), for the personal services of the Speaker.

1. **EVENT DESCRIPTION:**

Date:

Estimated Speaker Start Time:

Estimated Speaker End Time:

Event Location:

2. **SPEAKER NAME:**

Social Security Number (Required):

Permanent Address:

3. **CHAPTER CONTACT:**

Email and Phone Number:

4. **COMPENSATION:**

Fee/Honorarium	\$
Travel/Lodging	\$
Other	\$

**TOTAL COMPENSATION** \$

State any ADVANCE DEPOSIT amount if it is required by Speaker: \$





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5. **PAYMENT:** All payments will be in form of a check issued by the chapter and will be payable to SPEAKER.

6. **INDEPENDENT CONTRACTOR:**

The Speaker shall act in the capacity of an Independent Contractor and not as an officer, employee or agent of the Chapter. The Speaker agrees that it shall take such steps as may be necessary to ensure that any subcontractor or contractor shall be deemed to be an independent contractor and will not be considered or permitted to be an agent, servant, or partner of the Chapter. As such, the parties will each be responsible for their own acts of negligence as determined by law.

7. **CANCELLATIONS:**

- (a) Either party may cancel this Speaker Contract without obligation to the other if cancellation notice is received in written form at least 60 days before appearance date.
- (b) Speaker agrees to furnish payment to the Chapter for actual appearance preparation costs in the event of a late cancellation, late appearance, or non-appearance within 30 days after billing.
- (c) If, due to illness, accident, or other causes legally known as Acts of God, Speaker is forced to cancel a Speaker Contract, neither party, nor any representative shall be liable for any payment.

10. **MISCELLANEOUS:**

- (a) The Speaker is solely responsible for payment of royalty fees, and/or dramatic rights and dramatic musical works and/or performance fees, fees required by unions and similar organizations, and similar costs. The Speaker shall indemnify the Chapter against any liability or damages, including attorney fees, which may arise as a result of violation by Speaker of copyright laws.
- (b) Anticipated starting times specified in the Speaker Contract, subject to minor modifications because of unanticipated occurrences, are of the essence and hence, Speaker is required to be at place of performance a sufficient period prior to the scheduled time of commencement so as to permit timely presentations.

11. **EXECUTED CONTRACT SIGNATURE:**

This Speaker Contract shall be binding upon the parties hereto, their successors and assigns, upon due execution by both parties. The undersigned represents that he/she is a representative authorized to sign on behalf of the Speaker and to enter into this Speaker Contract. The parties have agreed to and executed this Speaker Contract as of the dates indicated below:

**ACCEPTED BY: (Chapter Representative)**

Print Name:

Signature: \_\_\_\_\_

Date:

**ACCEPTED BY: (Speaker)**

Print Name:

Signature: \_\_\_\_\_

Date:



## Metric Completion Checklist

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To consider this metric completed, your chapter must have hosted a full or half day chapter conference/symposia. To confirm completion of this metric please complete the following checklist.

- ☐ Plan the logistics for the chapter conference/symposia.
- ☐ Host a chapter conference/symposia lasting between 4-8 hours before December 31<sup>st</sup>.
- ☐ Report conference date, details, and attendance numbers to confirm completion of this metric on your next [Quarterly Report](#).

**Is there something we could add to this toolkit to improve it?**  
**[Let us know here.](#)**