

## Internal

The Office of Educational Resources and Planning – **OERP will be increasing management and application fees beginning July 1, 2019 for the first time in over eight years.**

The fee increases will occur in two different areas, and are as follows:

### 1. Conference Fee:

- ✓ **Conference management fees will increase to \$4,500 per day on January 1, 2020** for any UPMC and University of Pittsburgh departments. A list of services is attached.
- ✓ Continuing education certificates are \$30 each.
- ✓ There may be additional charges depending on requests by the course directors.
- ✓ If anticipating participants from outside Pennsylvania, there will be an additional charge of \$25 to obtain LSW/LCSW/LPC/LMFT credits from the University of Pittsburgh School of Social Work.
- ✓ If breakout rooms with audio-visual (AV) are scheduled, an outside AV company will need to be hired.

### 2. Continuing Education (CE) Application Fees for Accredited Courses (continuing education credits ONLY):

- ✓ We currently charge a \$50 application fee for accredited courses that are one day or less. This will remain at \$50.
- ✓ **If there are three or more breakouts for your program**, or three or more speakers, our application fee will increase to \$125 because of a more complex evaluation we need to create that is mandated by our accreditation bodies. If your program/conference is multi-day/multi-speaker, your fee will be \$125 and \$75 for each additional day.
- ✓ **Multi-Series program, Journal Clubs, identical recurring events, etc.** We are increasing this application fee to \$125 for each series. This type of programming requires the OERP staff to create event documents for each individual program although you are only charged the one fee.
  - **To keep this fee low**, we'll request that you send us a copy of the sign-in and sign-out sheets for each event and keep a copy for yourself.
  - At the end of the series, please send us the following:
    - A list of the dates that each person attended
    - The type of credits that are requested by each person
    - The last five numbers of their social security number (which is listed on their continuing education application)
  - If the program/department is paying for the continuing education certificates, please send the applications to us along with the list of participants and dates attended at the end of the series.
  - If participants are paying, please ask them to return the continuing education application and fee to OERP within one month. We'll have your list to compare and confirm attendance before issuing the certificate.

**Note: OERP is interested in expanding our videoconference series. If someone from your department is interested in doing a videoconference for us, we will waive one \$50 fee per year, or give a \$50 discount towards a multi-series program or complex evaluation fee. Please contact me at [barkowitzdh@upmc.edu](mailto:barkowitzdh@upmc.edu) to discuss this.**

**Continuing education (CE) certificates** for accredited courses range from \$15 to \$30 each, depending on the program. When a department is paying, we will charge our fee based upon the number of CE requests we receive in addition to the conference planning fee. If individuals are paying, they will need to submit payment to OERP directly.

**Available Accreditations:**

- **PA Professional Educator (Act 48):**
  - ✓ OERP can only be able to offer this if your program has content geared towards teachers in the classroom, and that teachers are part of the target audience. We need to have your information six weeks in advance to get approval for Act 48 credits.
- **Certified Drug and Alcohol Counselor/Certified Co-Occurring Disorder Professional (CADC/CCDP):**
  - ✓ **Conferences and accredited courses – Only available if we can submit your program brochure six weeks in advance.**
- **Licensed Social Worker/Licensed Certified Social Worker/Licensed Professional Counselor/ Licensed Marriage and Family Therapy (LSW/LCSW/LPC/LMFT):**
  - ✓ These credits are available from OERP if your participants are from PA.
  - ✓ If you expect participants from surrounding states, we'll request credits from the University of Pittsburgh's School of Social Work, which will be an additional \$25.
- **American Psychological Association (APA):**
  - ✓ We are nationally accredited by the APA for **accredited courses and conferences** if the programming meets the APA requirements.
- **National Board of Certified Counselors (NBCC):**
  - ✓ We are nationally accredited by the NBCC for internal conferences if the programming meets the NBCC requirements.
- **General Continuing Education Units (General CEU):**
  - ✓ We can offer your participants a General CEU certificate (appropriate for nurses and peer specialists).
- **Continuing Medical Education (CME):**
  - ✓ Credits will be obtained by OERP if requested when we are hired to manage your conference.
  - ✓ There is an extra fee paid to CCEHS. OERP will facilitate this process.
  - ✓ If OERP is not managing your program and you require CME credits, please contact Ryan Abels at the Center for Continuing Education in the Health Sciences (CCEHS) – [abelsrj@upmc.edu](mailto:abelsrj@upmc.edu). Your other continuing education credits are still available through OERP.

***Mental Health Conference Planning and Management Activities and Fees  
Breakdown of Conference Planning Activities***

**Pre-Conference Assistance**

- Meet with course director(s) and team (conference calls or in-person meetings) to outline the conference content, budget, potential dates and preferred location
- Interface with WPIC Conference Review Committee to obtain conference approved
- Development of preliminary budget, monitoring of income and expenses, disposition of funds, finalizing budget
- Work with the Center for Continuing Education in the Health Sciences for Continuing Medical Education credits (CCEHS) – CME process includes additional fees.
- Development and delivery of course materials
- Secure venue (research prices)
- Research and help arrange speaker transportation and hotel costs. All plane seats (unless approved of otherwise by the course director) are in coach.
- Negotiate contracts/deposits
- Contact exhibitors regarding space, equipment and electrical power needs
- Arrange for meals, breaks, receptions and menu planning
- Contact housekeeping, banquet services and concierge
- Oversee delivery of course material
- Communicate and negotiate with all vendors regarding printing, posters, meals, room set-up, audio-visual needs
- Venue walk-through and final arrangements (local venues)

**Continuing Education Accreditation**

OERP is an approved sponsor of continuing education credits for a variety of disciplines. For each of these types of credit, there is per program fee and/or annual fee which OERP pays to the approving accreditation body.

The **continuing education application fee** includes the work that is done prior to the event to determine which accreditations are applicable, completing the applications, determining the number of credits based on the day's agenda, the communication between the course directors and OERP, maintaining the appropriate format and wording necessary in the course outlines/training announcements, and developing the packet for conference participants.

- The accreditation fee includes processing certification requests and paperwork for continuing education credits for psychologists, social workers, nurses, counselors, educators (when applicable) and general education credits.
- All continuing education credits (including CME) requests cost \$30.
  - This can be paid individually by the conference participant requesting continuing education credits as an extra fee outside of their registration.
  - Course directors can include this cost in their registration fee.
  - Course directors can pay \$30 for each conference participant to cover the accreditation fee. This is listed as an expense on the budget.
- Create certificates for all disciplines accredited for that conference.
- Develop the evaluation required by the American Psychological Association, and the National Board of Certified Counselors. This must be completed by all event participants; however, it **must** be completed by those requesting psychology, NCC and LSW/LCSW/LPC/LMFT credits online before certificates can be issued.
- Manage the sign-in and sign-out sheets and distribution of certificates.
- Follow-up with appropriate continuing education accreditation bodies.

## **Materials Development, Promotion and Distribution**

- Develop brochures with course directors/team
- Edit brochures
- Facilitate the printing and mailing of brochures\*
- Assist in the development and facilitation of other promotional materials\*
- Develop mailing lists
- Managing the PowerPoint slides and information for speakers
- Create a handout booklet with bios, PowerPoint slides, and information to enhance the conference day if desired\*
- Prepare course announcement for course director
- Prepare signs

\*Printing and mailing of the brochures are an additional cost.

\*Printing the handout book has an additional charge.

\*Promotional posters and display boards are an additional fee.

\*Transportation of materials (i.e. art work) is an additional fee.

## **Registration Processing**

- Setting up registration site
- Accepting and tracking registrations and payments by checks, department journal transfers, and credit cards
- Mailing registration confirmation e-mails/letters
- Generating name tags
- Ensuring that special accommodations are identified and met
- Provide directions and travel, parking and other information to registrants
- Maintain attendance record

## **Vendors/Exhibitors**

- Maintain contact with all vendors/exhibitors.
- Arrange catering
- Arrange Audio-Visual requirements; hire AV vendor if necessary (cost is outside of conference management fees)
- Contract with all exhibitors – arrange for their participation

## **Event Involvement/On-site Supervision**

- Arrange for advance setup and directional signage
- Provision of onsite staff for the entire day during the program
- Ensure event and workshop sign-in and sign-outs and all corresponding paperwork is completed re: continuing education credits
- Attendance verified for awarding of continuing education certificates
- Ensuring that special accommodations are met
- Ensuring that food, audio-visual issues, picture/poster displays, venue temperature, last minute needs, etc. are attended to and that the schedule is going as planned

## **Speakers**

- Communicate with speakers to ascertain needs, answer questions, etc.
- Assist them with transportation to and from the Pittsburgh International Airport and where they're staying in Pittsburgh (locally)
- Outside of Pittsburgh, arrange transportation
- Process honorarium
  
- Assist with any questions and problems
- Obtain bios, presentation information and PowerPoint slides

## **Evaluation**

- Develop continuing education accreditation mandated evaluation instrument
- Analysis and summarization of the evaluation data
- Close out evaluation
- Send summary to course directors and team

## **Post-Conference Follow-Up**

- Provide the course director(s) with a final list of the registrants.
- Process invoices and bills as received.
- Work with the accounting department to reconcile the conference account resulting in the generation of a final statement of program income and expenses.
- Complete data entry of registrant or attendee and faculty records of continuing education credits awarded.
- Prepare final budget.
- Transfer funds (profits) to account designated by the course director, or to a deferred account to be used for future conferences.

## **Course Director/Team Responsibilities**

- Meetings (phone/in-person) with mental health conference planner and staff to outline content, vision of the event, dates, locations, budget, etc.
- Provide mental health conference planner and staff with a final program schedule, list of faculty (including academic titles and affiliations, addresses, telephone numbers and e-mail addresses). Provide the faculty's description of their presentation with three measurable education objectives, and three references supporting the presentation.
- Be available to the mental health conference planner and staff throughout the planning and preparation period for consultation on an as-needed basis
- Adhere to mental health conference planning budgetary recommendations with a view toward ensuring the program's financial solvency. All educational activities are assumed to be self-supporting with all costs expected to be recovered from tuition fees, educational grants, and other outside financial support. If the course doesn't break even or produce a profit, the course director/department is liable for any deficit.
- Provide hotel and travel expenses for each OERP on-site staff member at out-of-town events.

**Bundled Package (all inclusive) = \$4,500 per day\*; Continuing education certificates are an additional fee.**

**\*Price increase on January 1, 2020**

	<b>Bundled Rate</b>	<b>Individual Rates</b>
Pre-conference Assistance	\$0.00	\$1,000.00
Continuing Education Accreditation Application Fee	\$0 – If participants are from PA \$25 for LSW/LCSW/LPC/LMFT – If participants may come from outside PA	Varies depending upon the size of the evaluation/survey, and the number of certificates.
Material Development, Promotion and Distribution	\$0.00	\$500.00**
Organize dinners, social events, transportation, etc.	\$0.00	\$500.00
Reserve hotel rooms; maintain confirmation numbers; communicate with guests	\$0.00	\$250.00
Reimbursement/payment services per conference/event	\$0.00	\$1,000.00
Registration Processing	\$0.00	\$1,500.00
Event and Onsite Supervision (local)***	\$0.00***	\$1,000 per person (number of staff members dependent on number of attendees and responsibilities) + travel expenses.
<b>Application</b> for Continuing Medical Education* (CME)	Depends on fee from the Center for Continuing Education in the Health Sciences. *	Depends on fee from the Center for Continuing Education in the Health Sciences. *
Communication with Speakers to obtain Bios, PowerPoint Slides, AV needs, etc.	\$0.00	\$750.00
Evaluation and Post-Conference Follow-Up	\$0.00	\$750.00
Continuing Education Credits/CME Accreditation Fees (for processing certificates)	Varies depending on number of participants at training (outside of conference management fee)	Varies
Audio-Visual (AV) Fees	For events that will take place in more than one room, we recommend using our outside AV team. Their fees vary depending on services and are in addition to the conference management fee.	We can recommend our AV team.

\*CME credits are obtained by OERP through the Center for Continuing Education in the Health Science (CCEHS) when we are hired to fully manage the conference. **CCEHS charges a varying price per conference in addition to the OERP charge.** These charges are separate from our conference planning charges and are in the budget as an additional expense.

\*\*This includes brochures, emails, and mailing of brochures.

Please contact me if you have any questions, and/or you'd like to discuss planning a conference if we haven't yet communicated about this.

Thank you!

Doreen