

AOA Paraoptometric Section State Leaders Guidebook

Section Seven:

Meeting Planning Guide



2010

Paraoptometric Program Planners Guide



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Paraoptometric Program Planners Guide

Program Planners Guide

American Optometric Association Paraoptometric Group

Paraoptometric Section

Commission on Paraoptometric Certification

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CHAPTER ONE - GENERAL INFORMATION

Paraoptometric continuing education includes any formal learning activities that relate to the practice of optometric assisting. Continuing education programs sponsored by the AOA provide an effective means of keeping current and maintaining Commission on Paraoptometric Certification.

The basic goal of any paraoptometric education is to promote the professional performance of the optometric assistant and assist in maintaining quality patient care.

A. PURPOSE

The AOA Paraoptometric Group understands that paraoptometrics, both certified and non-certified, should continue to expand their skills in order to enhance the quality of services and patient care they provide. The CPC requirements for certification renewal are designed to encourage and motivate certified paraoptometrics to continue their professional education through continuing education.

B. RECERTIFICATION THROUGH CONTINUING EDUCATION

Recertification of an individual's specialty through maintenance of continuing education requirements assists the professional to remain current in his/her field and aware of recent development in research, theory, and practice of the specialty. Renewal of the certification indicates a participation or adherence to expected levels of standards of professional growth standards within the field. Recertification shows that they are up-to-date and at the leading edge of developments in the profession. Recertification is a commitment to career-long learning and a commitment to the principle of lifelong learning is therefore central to maintenance of competence and, by extension, to ensuring the public can expect high professional standards from their optometric assistants.

Those individuals who are certified with the CPC must participate in continuing education activities and report such activities to the CPC every three years. A minimum of 18 hours every three years is required.

C. CPC CONTINUING EDUCATION APPROVAL

The CPC renewal program helps assure that Certified Paraoptometrics remain current in optometric assisting skills and knowledge. The purpose of recertification is to ensure that certified paraoptometrics maintain their competence to practice by increasing their knowledge, interacting with their peers, and meeting professional standards.

To achieve a high level of quality continuing education, the CPC has a pre-approval process for continuing education programs. Organizations that sponsor continuing education and training are encouraged to seek pre-approval of their programs which will indicate that their programs are appropriate to use toward meeting recertification requirements. The following education providers are blanket approved and although it is not necessary to not make application for review, it is important to provide the full program to the CPC for informational purposes.

American Optometric Association (includes Optometry's Meeting® and Paraoptometric Section)

Schools and Colleges of Optometry

Regional and International Optometric Conferences

COPE approved courses

COVD approved courses

JCAHPO approved courses

ABO and NCLE approved courses

State Optometric Associations

State or Local Paraoptometric Associations

Optometric Extension Program Foundation approved courses

Recognized Paraoptometric Institutions

Providers pre-approved by the CPC (check with education provider regarding pre-approved courses)

D. CPR AND FIRST AID COURSES

First Aid and/or CPR certification provided by the American Red Cross or American Heart Association (maximum 4 hours) is also accepted. A copy (front and back) of the attendance card will serve as proof of attendance.

CHAPTER TWO – DESIGNING AN EFFECTIVE PROGRAM

A. NEEDS ASSESSMENT

Needs assessment identifies the needs and interests of the program participants. Identified needs and interests should be developed from data sources (surveys, questionnaires, etc.) rather than the program planner's own opinions of needs and interests.

Needs assessment should ideally be scheduled on a regular basis for any state section or society producing continuing education programs, since the educational needs of paraoptometric are constantly changing. At a minimum, this assessment should be conducted on an annual or biannual basis. *(See Appendix 1 for sample needs assessment)*

B. SURVEYS

The survey usually includes questions on:

- Participants' preferences on time, date, and location of program
- Topics/speakers of most interest to participants
- Educational level/certification status of participants
- Participants' preferences on length of program and financial limitations
- Reasons which might keep a participant from attending (lack of child care, transportation problems, etc.)

C. METHODS

A formal needs assessment may be either oral or written. In either case, permanent records should be made of the responses for future planning needs.

D. VERBAL ASSESSMENTS

Verbal assessment has the advantage of allowing the respondent to express opinions spontaneously. It has a disadvantage as well, in that participants whose identities are known will sometimes respond as they believe they should rather than as they truly feel.

A verbal needs assessment may be done by telephone survey, by surveying participants at regular continuing education programs, or by forming small group sessions during a larger convention or meeting. It is essential that the leaders conducting verbal surveys be trained to:

- frame standardized questions, so that all answers can be compared
- phrase questions impartially and unemotionally, so as not to affect the answers
- consistently record the responses of the participants

E. WRITTEN ASSESSMENTS

Written assessments provide the best method for doing needs assessment by making it possible to keep the identity of the participant anonymous. Many times people are more willing to share their true feelings when they know that their identities will not be revealed, particularly when they have criticisms or negative comments.

A written questionnaire also has the advantage of being easier to compile than an oral survey and has the potential for distribution to a wider audience.

F. DISTRIBUTION

Written surveys may be distributed directly to participants at continuing education programs on both the state and local level or by mail, to:

- Paraoptometric members
- Non-member participants of your continuing education programs
- Local optometrist offices or other health care settings where optometric assistants are employed
- Students enrolled in formal assistant or technician programs (if local)

Distributing the surveys as widely as possible will enable the program planner to target those paraoptometrics in the area who rarely attend programs or have never attended a program. Determining their needs and planning programming to meet those needs could result in a significant increase in attendance at continuing education programs and state and national membership.

G. CHOOSING THE TOPIC(S)

Current Issues: Whenever changes occur that may affect optometry, these should be targeted as topics for continuing education activities.

Needs Assessment: The use of surveys and questionnaires can provide a list of topics for continuing education programming.

H. IDENTIFYING THE LEVEL OF PARTICIPANTS

Program planners need to be aware of the educational background and accumulated knowledge of their target audience. Programs should be planned to meet the varying educational needs and levels of the participants and define the program level as basic, intermediate, or advanced.

Basic: Introductory material for those who have had very little or no previous background in the subject area.

Intermediate: For those who possess some experience and basic knowledge in the subject matter being addressed.

Advanced: For those who have had two or more years of experience in the subject matter area.

All Levels: Information for all levels of education, training and experience. Material presented will include basic, intermediate and some advanced information.

I. DEVELOPING THE PROGRAM

It is important to provide programs from each of the above categories to meet all participants' needs. Once the subject matter has been chosen and the audience identified, the program needs to be developed. It is important to keep in mind the final program to be presented and to be clear about what information will be presented to participants.

Decide what specific information is to be presented and develop an outline that fits the time frame. Is the topic one that includes many areas of interest? If so, perhaps it will be necessary to narrow the content down.

Include such items as:

- lecture
- workshop
- question/answer session

With the presenter, develop the content outline so the presenter can prepare the proper materials. After the outline is developed, specific learning objectives must be identified. Develop the objectives in discussion with the presenter to ensure that the material is organized to meet the objectives.

Learning objectives state what the participant will gain from attending the program. For example:

- "At the end of this session, the participant will have an understanding of the budget developmental processes."
- "Upon completion of this course, the participant will know how to Write and maintain effective practice procedural manuals."

The objectives should be shown so the participants can select courses based on their needs and interests.

J. LENGTH OF PROGRAM

The length of a course/program varies but typically most courses are either one or two hours in length. The minimum length of any educational offering should be set at one hour. Take care that the time allowed is appropriate for the amount of information being presented and the type of instructional methods being used.

K. CONTINUING EDUCATION CREDIT

The Commission on Paraoptometric Certification awards credit hours in one-hour increments (50 minutes=1 hour=1 CEC). Credit hours are for actual instruction time and include a question/answer session, but exclude time spent on registration, introductions, pre and post tests, breaks, and completion of course evaluations. Credits are awarded based on course descriptions, learning objectives, and faculty qualifications.

Proof of attendance must be provided to the participants. Credit for a course should be denied to individuals who are absent 15 minutes or more. Attendance records must be maintained on file for at least 3 years from the date of the presentation.

CHAPTER THREE – EXPENSES

A. FINANCES

Presenting continuing education programs will almost always involve expenses **and** need to be considered when planning. Determine the forecasted expenses prior to setting registration fees as the fees should be large enough to cover the costs, but still affordable and marketable. You can look at the costs of other programs in your area and set fees accordingly too. And, if appropriate, set a differential between fees for members and nonmembers. This gives a benefit to members and provides an incentive for nonmember participants to become members of your state paraoptometric group.

Schools and colleges are usually very cooperative in offering classroom space at a nominal charge or at no charge. Hotels/motels may choose not to charge for a meeting room if there is a meal function included in the program. Also, combining resources to cosponsor an educational program with another organization or institution, such as your state optometric association is another method of reducing program costs.

Speakers' requirements for honorariums or other reimbursements vary as some speakers may ask only that their travel expenses be reimbursed; for others a small token of appreciation may be appropriate. The decision to budget for honorariums should be made before contacting the speaker.

B. SPONSORSHIP

Potential expenses include marketing, speaker honorarium/expenses, meeting room and audio visual meal expenses, and printing costs. There are many resources that can be drawn upon to assist in the cost of education programs.

Check with your sales reps to see if they can provide assistance or sponsorship in the areas of speakers, meeting rooms, printing, postage, supplies for hands-on activities and other assistance. And, if assistance is provided, be sure to give the company or individual appropriate recognition.

C. CREATING A PROGRAM BUDGET

See Appendix 2 for sample budget

CHAPTER FOUR – SPEAKERS

A. CHOOSING SPEAKERS

The AOA Paraoptometric Section has available a Speakers' Bureau. This resource can help with the challenging tasks of finding speakers for conferences, workshops and training sessions. The Speakers' Bureau provides an easy way to find the names of lecturers, on what topics they lecture, and how to contact them through contact information entries and subject categories. When enlisted the assistance of the Speakers' Bureau, additional information such as availability dates, costs associated with the lecture, or travel options will need to be discussed with each individual speaker.

The basic criteria in selecting a speaker are knowledge of the subject matter by education and/or experience and the ability to communicate this knowledge to others. The field of optometry has expanded so rapidly and grown to cover such a wide variety of duties and responsibilities that there is almost an unlimited source of instructors or speakers appropriate for your program. Optometrists have always provided a willing pool of speakers and are most glad to share their knowledge and expertise with paraoptometricians. Experienced Certified Paraoptometricians as well as Optometric Assistant/Technician Program personnel, make excellent speakers because they can directly address areas of expertise. Other professionals who may be called upon as speakers are industry sales representatives and practice management consultants.

The business community can provide a variety of experts in such areas as telephone communication, insurance billing, collections, management, and personnel issues. Other state paraoptometric affiliates may have information on speakers they have used and can recommend, or they may have members who are experienced in presenting programs in their particular field.

B. INITIAL CONTACT

When contacting a potential speaker, a brief introduction may be appropriate, particularly if the speaker is unfamiliar with your organization. A summary of the program should be discussed with your potential speaker, the target audience should be described, and the level of the program should be specified. If the speaker agrees to be the instructor, details of the program can be finalized. (If the speaker is not available to present the program, thank him for his time and inquire if he might be available for any future programs.) Confirm the date, time, and location with the speaker and discuss and develop the specific content outline, learning objectives, and instructional methods of the program with the speaker. Clarify whether the speaker will provide handouts or audio/visual aids or if these are to be provided by the program planner. Include a clear discussion of any financial arrangements, as well as any travel arrangements that might be necessary. At the end of the conversation, let the speaker know you will be confirming all arrangements in writing. And, do so immediately following the initial contact so everything is fresh in your mind.

C. WRITTEN CONFIRMATION

The written confirmation/contract should include the topic, date, time and location should be specified. In addition, the general outline of the program and specific details that were previously agreed upon should be confirmed. If an honorarium was agreed upon, or other financial arrangements made, these should also be confirmed. If meals, rooms, or transportation will be provided, this should be made clear.

See Appendix 3 for sample written confirmation

See Appendix 4 for sample speaker contract

D. TELEPHONE OR E-MAIL CONFIRMATION

Two to three weeks before the program, contact the speaker by telephone or e-mail to confirm that all arrangements are in order. Reconfirm details such as provision for audio/visual equipment, handouts, or anything else that will be necessary for the speaker. Repeat the confirmation two to three days prior to the program.

E. HOSPITALITY FOR SPEAKERS

The speaker is the most valuable part of the program and should be made to feel relaxed and welcome. It is customary to invite the speaker to attend any meal function connected with the program as a guest of the association. The program planner should make arrangements for complimentary meal tickets and give them to the speaker, particularly if the tickets will be collected when the meal is served. If transportation is necessary, inform the speaker of the types of transportation available to the meeting site and whether transportation expenses will be reimbursed. Usually, speakers are requested to make their own transportation arrangements. If the speaker must stay overnight at the meeting site, let him know of any accommodations reserved for the group. Also let him know whether you will be paying for such expenses.

F. DAY OF LECTURE

Make sure that someone is assigned to meet the speaker upon arrival and act as host. The host should arrange for someone to remain with the speaker at all times and make sure he is introduced to the association officers and other speakers. It is a good idea for the host to become familiar with the background of the speaker, since this will be helpful in making the speaker feel at ease and welcome.

G. SPEAKER INTRODUCTION

Identify several outstanding achievements, particularly those related to the program topic, from the speaker's curriculum vitae or résumé. Mention the qualifications and achievements of the speaker in a one to two minute introduction. The title of the presentation should be included and the statement:

“It is my pleasure to present _____.” Never (even when the speaker is well-known to the audience) preface the introduction with the words, “This speaker needs no introduction.”

H. POST PRESENTATION

At the conclusion of the speaker’s presentation, either the program planner or the chairman of the program should thank the speaker, who will either return to the speaker’s table or leave the podium. Whether the speaker leaves the meeting immediately or at the end of the program, the program planner should personally thank the speaker.

SPEAKERS/INSTRUCTORS—CHECKLIST

- Identify sources for speakers (as soon as topic is chosen)
- Determine budget for program (as soon as topic is chosen)
- Make initial contact (immediately after identifying speakers)
- Send written confirmation (one to two days following initial contact)
- Arrange hospitality (as soon as speaker is chosen)
- Confirm audio/visual or other equipment/supplies (as soon as speaker is chosen and again on day of program)
- Confirm by telephone or e-mail (two to three weeks before the program)
- Make final confirmation (two to three days before the program)
- Introduce speaker (on day of program)
- Thank the speaker (following the program)

CHAPTER FIVE - LOCATION AND LOGISTICS

A. CHOOSING THE LOCATION

The site for the program should be selected after consideration of the location of the facility and the suitability of the amenities offered. There are usually many choices of facilities for meetings available in a community, including:

- Schools or colleges
- Hospitals
- Optometric association offices
- Clinics or physicians' offices
- Hotels/motels
- Convention centers
- Community centers
- Restaurants with meeting facilities

Criteria for selection should include:

- A professional setting
- A meeting room that is easily located
- Available parking
- close public transportation (if applicable)
- Clean, safe environment
- Adequate restroom facilities

B. MAKING THE ARRANGEMENTS

All program arrangements should be done in person. It is important to meet only with someone who has the authority to speak for the facility and see that your requirements are fulfilled. Allow adequate time to discuss the arrangements in full.

C. CONTACT WITH THE FACILITY

At the first meeting with the facility representative, explain the type of function and give a brief program description.

Be sure to personally inspect the meeting room to ensure that it meets your requirements.

The size of the room needs to match the size of the expected audience. Both speaker and participants will be uncomfortable in a large room only half full. Conversely, it is difficult to concentrate in a crowded room, where the

speaker may not be adequately heard or seen. Try to arrange for an alternate meeting room should the actual size of the audience be significantly larger or smaller than planned. Inform the representative of the seating arrangements that will be required. Generally, a classroom setting with tables and chairs will be appropriate for lectures or panel discussions. If a laboratory or hands-on setting is required, make sure that the room logistics will provide both safety and ease of activity.

Make sure that the lighting and acoustics are suitable.

Arrange for an area to be set up for registration of program participants. If a desk or table and chairs are going to be needed for registration activity, determine who is going to provide it.

Audio-visual equipment needed by the speakers should be discussed. Be clear whether this will be provided by the facility or will need to be obtained elsewhere. If blackboards, screens, podiums, or other equipment will be required, this should be clarified at this time.

Any arrangements for meals or refreshments should be made at the initial meeting. The number of participants should be estimated and the price per person should be agreed upon with the facility representative.

Determine when the facility will need to know the final attendance and whether provision can be made to accommodate unexpected or late arrivals.

D. WRITTEN CONFIRMATION

Within a few days after the initial discussion with the facility representative, send a written confirmation which outlines all arrangements.

Be specific about financial agreements and also about any meals and breaks that the facility will provide. Request a written confirmation from the facility in return. Make telephone or e-mail contact to clarify arrangements.

E. TELEPHONE OR E-MAIL CONFIRMATION

Make a final telephone or e-mail confirmation two or three days before the program to allow time for last minute changes.

F. OTHER ADVANCE/ALTERNATIVE ARRANGEMENTS

The program planner should appoint members to serve at the registration desk on the day of the program. Registration should be an easy process for the participant, and as much as possible should be prepared in advance. The people at the registration desk should be familiar with the logistics of the program so they can answer any questions that participants may have.

If the facility is not providing the meals or refreshments, be sure to make alternate arrangements well in advance of the program.

If audio-visual or other equipment needs to be rented from outside the facility, this will also need to be done in advance.

Assign someone to be responsible for pick-up or delivery.

You will also need to arrange for class monitors.

G. CLASS MONITORS

A class serves as your instructor's right-hand person. Duties and responsibilities of the class monitor focus on keeping attendance, collecting class entry tickets, hospitality, setting up tables and chairs, stamping continuing education forms, and assisting the instructor in general. You will need to secure at least one monitor per class. You may wish to meet with the monitors prior the program start to provide instructions and answer any questions they may have.

H. DAY OF THE PROGRAM

Make a final check to ensure the meeting room is set up correctly and the registration desk is prepared. Handouts and other course materials may be distributed at the time of registration.

If non-members are expected to attend, information about CPC and Paraoptometric Section membership applications should be available at the registration desk.

Name tags are essential and may either be prepared in advance or at the time of registration.

Following the final check, the major responsibility of the program planner on the day of the program is to serve as host for the speakers and participants and to enjoy the meeting.

I. POST PROGRAM

Along with the association treasurer, the program planner will need to meet with the facility representative and take care of the expenses connected with the meeting. Be sure to thank the representative for any special arrangements made for the meeting. If the facility arrangements did not meet expectations, this should be brought to the attention of the representative at this time.

LOCATION AND LOGISTICS—CHECKLIST

- Select the site (as soon as topic is chosen)
- Contact the facility (immediately after selecting site)
- Select registration desk and monitor helpers
- Make other advance/alternative arrangements (after initial contact with facility)
- Send written confirmation to facility (two to three days after initial contact with facility)
- Make final check of facility (on day of program)
- Pay for meeting facility (after the program)

CHAPTER SIX - PUBLICITY AND MARKETING

A. PROMOTIONAL MATERIALS

A brochure or flyer is one of the most useful promotional materials for marketing the program. All brochures and printed materials must contain the following disclaimer: This program(s) has been granted prior approval by the Commission on Paraoptometric Certification (CPC) for continuing education units (ABO/NCLE, etc. if applicable). Granting approval in no way constitutes endorsement by the CPC of neither the program content nor the program's sponsor.

B. INFORMATION FORMAT

Informing your target audience about the program is vital for a successful program. Care should be taken to accurately describe the program and to ensure all pertinent information is available for potential participants.

Basic information to be covered in promotional materials should include:

- Course title
- Description of course content
- learning objectives
- Instructional methods
- Instructor's name and qualifications
- Level of instruction
- Prerequisite skill or knowledge (if applicable)
- Date, time and location
- Cost and registration information
- Refund and cancellation policy
- Name, address and phone number of contact person
- note if program is approved or pending approval of CPC (ABO/NCLE, etc. if applicable)
- Information about meals, parking, or directions to facility
- Registration information if overnight stay is necessary

C. FORMAT

When planning the brochure, there are several ways to make it more effective:

- Print using two or three colors.
- Be large in scale. Larger formats outperform smaller ones.
- Provide a simple and convenient response option by phone, fax, or mail (e.g., Mary Brown, Program Chair).

- Send out a first and a second mailing. The second mailing can go out on the day one-half of the expected registrations are received.
- Mail in first class envelopes.
- Also, envelopes allow for additional related inserts.

D. DISTRIBUTION

Maintaining a mailing list for potential program participants is essential. Active members of the association will constitute the core of the list; however, former members, certified paraoptometric and paraoptometric who are not yet members and participants in former programs are also excellent sources. The AOA Paraoptometric Group will often provide mailing lists, upon request. Also, brochures and flyers can be distributed at meetings or directly to office personnel. In addition to mailing of brochures, several other methods of publicity are available.

- E-mail blasts have become popular.
- Posters distributed at optometry offices may be effective.
- Notices or articles in State Optometric Association or State Paraoptometric Association newsletters.
- AOA Paraoptometric Section and Commission on Paraoptometric Newsletters
- Press releases

E. PROGRAM EVALUATION

Evaluation by the Participant

Program evaluation involves getting feedback from program participants as to how the program met their needs and expectations. This should be done immediately following the program and should request participants to complete an evaluation form. Areas covered in the evaluation form usually include program content, instructor effectiveness, facilities, handouts, and audio/visual materials. Other questions that the program planner considers appropriate to the planning process may also be included. The evaluation form should be short and easy to complete. The format should allow the participant to answer specific questions and to make comments or suggestions. Keep the evaluation forms on file to help with future program planning. Recommendations or suggestions for future programs will make it easier for program planners to build on the strengths and eliminate problem areas discovered in the current program.

Evaluation by the Program Planner

At the end of every program, make a brief summary of the successes and weaknesses of the presentation. All of the factors that go into planning a program should be evaluated, such as the appropriateness of the topic, effectiveness of the speaker(s), financial success of the program (if a profit was anticipated), attendance level, and the response of the participants to the program. An effective program evaluation will help you, as the current program planner, and future planners to present the highest quality continuing education programs possible. Included are sample program

evaluation forms. These are just examples that can be used as they are or revised as necessary to provide a useful evaluation tool. *(See Appendix 4 for sample program evaluation)*

APPENDIX 1 – SAMPLE NEEDS ASSESSMENT SURVEY

Name: _____
(optional)

E-mail: _____
(optional)

By completing this questionnaire, you will help plan programs that will benefit the greatest number of paraoptometrics in the area.

REGULAR MEETINGS (USUALLY HELD ONCE A MONTH)

1. Please indicate the day and time that is the most convenient for you. List first and second choice.

Day _____ Time _____

Day _____ Time _____

2. Topics that you would like scheduled for the regular meetings:

- | | |
|---|---|
| <input type="checkbox"/> Lecture | <input type="checkbox"/> Demonstration |
| <input type="checkbox"/> Workshop | <input type="checkbox"/> Teleconference |
| <input type="checkbox"/> Panel discussion | <input type="checkbox"/> Audio conference |
| <input type="checkbox"/> Seminar | <input type="checkbox"/> _____ |

3. Do you know of anyone who would be a good speaker for a meeting or seminar?

4. Do you know of a sales or industry representative that might have a presentation suitable for a meeting or seminar?

LONG TERM COURSES (A SERIES OF CLASSES OFFERED OVER A PERIOD OF WEEKS/MONTHS)

1. I would be interested in a course on:

- Anatomy and Physiology
- Clinical Procedures

- Pre-Testing Procedures
- Practice Management
- Office Administration
- Certification Review
- Ophthalmic Dispensing
- Coding and Billing
- Instrumentation
- Contact Lenses
- Other _____

2. I prefer that the classes be held:

- Twice a week for _____ (number of weeks)
- Once a week for _____ (number of weeks)
- Semi-monthly for _____ (number of months)

3. I can attend classes that meet on (check all that are possible and indicate 1st and 2nd choices):

- Monday evening Friday evening
- Tuesday evening Saturday morning
- Wednesday evening Saturday afternoon
- Thursday evening Sunday afternoon

4. Evening hours that are most convenient for me begin at:

- 5:30 6:00 6:30 7:00 7:30

5. I prefer to meet for sessions of:

- 1 hour 2 hours 3 hours

Comments:

GENERAL INFORMATION

1. Are you a certified with the Commission on Paraoptometric Certification (CPC)? Yes No

2. If not, are you interested in becoming a certified as a CPO, CPOA, CPOT? Yes No

3. If no, why not?

4. Are you a member of the AOA Paraoptometric Section? Yes No

5. If not, are you interested in becoming a member?

Yes No

6. If not, why not?

7. What percentage of your time in the office is spent in doing:

_____ % Administrative Procedures

_____ % Clinical Procedures

8. Did you receive your training as an optometric assistant in a formal training program or were you trained on the job?

formal training on-the-job training

9. How many years have you worked as a paraoptometric? _____

THANK YOU FOR TAKING THE TIME TO COMPLETE THIS FORM. YOUR ANSWERS TO THESE QUESTIONS WILL HELP THE PROGRAM PLANNER CONSTRUCT PROGRAMS TO MEET YOUR NEEDS. RETURN THIS FORM POSTMARKED BY _____ TO:

APPENDIX 2 – SAMPLE BUDGET

Income			
Registration Fees	\$		
Other (sponsorship funds)	\$		
Total Income			\$
Expenses			
Speaker Expenses	\$		
Honorarium	\$		
Travel Expenses (airfare, mileage, tolls)	\$		
Lodging	\$		
Meals	\$		
Other			
Sub-Total		\$	
Meeting Room Expenses			
Room Rental	\$		
Audio Visual	\$		
Other	\$		
Sub-Total		\$	
Food and Beverage Expenses			
Meals	\$		
Refreshment Breaks	\$		
Other	\$		
Sub-Total		\$	
Printing/Marketing Expenses			
Handouts	\$		
Program Printing	\$		
Postage	\$		
Other	\$		
Sub-Total		\$	
Other Expenses			
Sub-Total			
Total Expenses			\$
Profit/Loss			\$

APPENDIX 3 - SAMPLE WRITTEN CONFIRMATION

Date

Speaker Name

Address

City State Zip

Dear _____:

Thank you very much for your commitment to the Paraoptometric Education Program for the name and location of meeting to be held on date(s). You are scheduled to present the following course(s):

List course titles

Enclosed are your speaker contract(s). Please complete, sign and return with a copy of your handout (if any), and a brief biography to: your name and address by deadline date. Also, please sign and return the copy of the Guidelines for Speakers.

The name of meeting will be held at name of hotel or convention center. A Registration Program is being sent to you under separate cover (if available). Please make your hotel registration (if needed) as soon as possible. Hotel information can be found in the program (or provide full hotel name, address, and telephone number).

Please let me know if you have any questions and again, we thank for participating in Paraoptometric Education.

Sincerely,

Your name and title

Enclosures

APPENDIX 4 - SAMPLE SPEAKER CONTRACT

EDUCATIONAL OBJECTIVES AND PROGRAM INFORMATION

Instructor: _____

Course Date: _____ Time: _____ Course #: _____

Course Title: _____

Maximum Class Size: _____

(Please make any changes if needed)

ADMINISTRATIVE DATA AND REQUIREMENTS

Address for future correspondence:

Street

City

state

zip

Business phone

cell phone

Fax

e-mail

Yes No Will you have handouts? If so, you are required to furnish a camera ready copy no later than

date. Handouts must not be of a commercial or self promotional nature.

A black and white photo should be sent with this agreement to be used for promotional purposes. The speaker warrants that he/she is the owner of copyright interests in and to the photography and authorizes reproduction of said photograph for promotional purposes. _____(initial/date)

A brief biography to be used for promotional purposes which should include a statement disclosing business interests and/or corporate entities with which you are affiliated.

AUDIO VISUAL REQUIREMENTS

Please list what audio-visual equipment is required.

Your signature below constitutes agreement to participate in the name of meeting as a speaker/lecturer. As such, you are required to furnish all of the above information and materials by date.

Signature _____ SSN (Federal Tax ID No.) _____

REIMBURSEMENT POLICY

Speakers will be paid on or before date for the following expenses: Indicate what documentation is required for reimbursement/payment) as per your agreement with speaker.

Please keep one copy for your records and return the remaining copy to: Your name and address

APPENDIX 5 - PROGRAM EVALUATION

Please complete this evaluation and return it to the workshop coordinator upon leaving.

WORKSHOP TITLE: _____

PRESENTER: _____ DATE: _____

1. Was the information presented what you expected? Yes No

If not, what were your expectations? _____

2. Would you encourage others to attend similar workshops? Yes No

3. On a scale of 1-5 (with 5 representing excellent), rate the workshop presenter in the following areas:

a. Professionalism 1 2 3 4 5

b. Presentation (speech pattern) 1 2 3 4 5

c. Knowledge of subject 1 2 3 4 5

d. Held interest 1 2 3 4 5

e. Use of audio/visual aids 1 2 3 4 5

f. Ability to explain information 1 2 3 4 5

g. Encouraged and answered questions 1 2 3 4 5

Comments: _____

4. How did you learn about this program? _____

5. Would you be willing to attend any future workshops? Yes No

6. Do you have any suggestions for topics or speakers for future programs?

RESOURCES

AOA Paraoptometric Section

243 N Lindbergh Blvd
St Louis MO 63141-7881
800-365-2219
314-991-4101 (fax)

Joan Murphy, Manager ext. 4222 – jvmurphy@aoa.org
Mary Ellen Poff, Secretary ext. 4108 – mepoff@aoa.org
ps@aoa.org

Commission on Paraoptometric Certification

243 N Lindbergh Blvd
St Louis MO 63141-7881
800-365-2219
314-991-4101 (fax)

Darlene Leuschke, Administrator/Registrar ext. 4135 – dmlleuschke@aoa.org
Sharon Alderson, Administrative Assistant ext. 4210 – salderson@aoa.org
cpc@aoa.org

American Board of Opticianry (ABO) and National Contact Lens Examiners (NACLE)

6506 Loisdale Rd Suite 209
Springfield VA 22150
703-719-5800
703-719-9144 (fax)
mail@abo-nacle.org

Joint Commission on Allied Health in Ophthalmology (JCAHPO)

2025 Woodlane Drive
St Paul MN 55125-2998
800-284-3937
651-731-0410 (fax)
jcahpo@jcapho.org



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Paraoptometric Section

Speakers' Bureau

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- [Speakers' Bureau Criteria for Lecturers](#)
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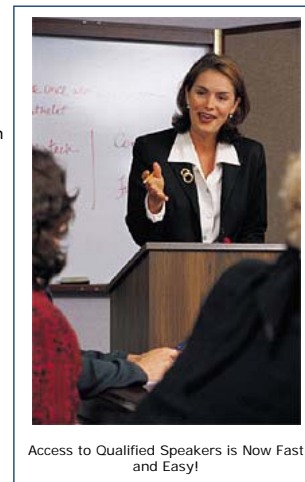
The AOA Paraoptometric Section offers a new membership benefit: a Speakers' Bureau. This resource can help with challenging tasks of finding speakers for conferences, workshops and training sessions.

The Speakers' Bureau provides an easy way to find the names of lecturers, on what topics they lecture, and how to contact them through contact information entries and subject categories.

Additional information such as availability dates, costs associated with the lecture, or travel options will need to be discussed with each individual speaker.

To access the Speaker's Bureau, [click here](#).

To find out more information, click on the [Speakers' Bureau Criteria](#) or [Application](#).



Access to Qualified Speakers is Now Fast and Easy!