September 2021

Inside This Planning Guide
1  Purpose and Focus
2  Step One: What do I have?
3  Step Two: The Leave Behind
4  Step Three: Make a Plan
5  Sample Initial Contact Letter
6  Step Five: Initial Site Visit
7-8 Event Site Planning Worksheet
9-10 Sample Site Agreement
11  Step Six: The Details

---

Use event sites when they have the potential to provide an outstanding event experience for HOSA members.

---

Purpose

The purpose of Health Science Education and HOSA: Future Health Professionals, is to prepare students to successfully pursue a career in the health industry. Annually, HOSA Leadership Conferences at the state/country and international levels support the mission of HOSA by helping to prepare future healthcare professionals.

The HOSA Competitive Events Program is a force that drives state and national leadership conference participation, and partnerships are critical to the success of competitive events. Partnerships are needed to provide qualified judges, and to host events in which HOSA members are asked to demonstrate clinical skills.

Focus

This planning document will focus on establishing partnerships for event sites. “Event sites” are locations that are typically outside of the traditional hotel meeting space. They usually have unique features that make them conducive to a more realistic and successful event experience for HOSA members.

Generally, event site partnerships are for clinical (skill) events that use specialized equipment, such as hospital beds.

Event site partnerships are often a matter of choice. Is there an event site that:

A. Is a reasonable distance from the hotel or main event location?
B. Would benefit from a HOSA partnership?
C. Has the potential to provide an outstanding event experience for HOSA members?

All aspects of the partnership should be considered in the planning process.
STEP ONE: What do I Have to Offer?

Before your first partnership meeting, think about what is it that you can offer to potential partners or clinical sites that would be of value to them. Try to think of things that are of minimal or no cost to you that a health facility or agency might value.

Examples of things you might offer could include:

- Free exhibit space (or a table outside a high traffic area at your conference.)
- An advertisement in your convention program or on your state website.
- An opportunity to speak to students or advisors.
- VIP seating during the Opening Session.
- A chance to “give back” while supporting the future of health care.
- An intrinsic reward. Hosting and judging an event is an enjoyable experience for the host!

If you have standard things you offer, go ahead and create a document or card that lists what the partner will receive from you, and whenever possible, the deadline and manner for receipt of their information.

For example, if you offer each of your partners an exhibit table, you might include something like:

EXHIBIT TABLE – HOSA offers you one table of free exhibit space.

1. Fill out and return the attached exhibit form by 2/2/2019
2. Email or fax the form to hosa@statehosa.org FAX 919 333-3333
3. You will receive exhibit confirmation by 2/12/2019

STEP TWO: The Leave Behind

The “leave behind” is typically your business card and materials that you give to a potential event site.

The purpose of the leave behind is to provide more information about your organization and to create a positive impression. Think carefully about what you put in your leave behind. Include only those materials that help explain the partnership and have a professional appearance. Including too much information can be overwhelming, so keep it simple and specific.

What should be in your leave behind? (continued)
What’s in Your Leave Behind?

If the purpose of this potential partnership is to ask the site to host a skill event, your leave behind might include:

- Your business card
- Your state conference program from the previous year
- A current National HOSA Fact Sheet (because it describes the mission of HOSA, a national partner list, and organization demographics.)
- A complete set of the guidelines for the event to be hosted.
- Forms they need to fill out – such as an exhibit form, etc.
- Something with your state HOSA logo – such as a pen, hand sanitizer, etc.

We like putting the materials in a HOSA folder, or regular file folder with a HOSA label.

Most of the time you will refer to the materials in your “leave behind” during your visit. On occasion, you will drop off the “leave behind” as part of your efforts to get a face-to-face meeting.

STEP THREE: Make a Plan

Your purpose for creating event site partnerships is to provide the best possible event experience for HOSA members. Sometimes the hotel or school that is hosting your conference is the best place. Sometimes it is not. There are value-added benefits to working with healthcare and community partnerships that should be considered as part of the big picture. Those benefits may include judges, scholarships, speakers, and a whole lot more. For example, in the past we partnered with the ESPN Wide World of Sports to use their training room for Sports Medicine. They provided us with three athletic trainers for judges. We were able to meet with those judges and review the rating sheets. Before the event, the judges practiced the skills following HOSA’s guidelines to assure they were judging fairly and consistently.

Not only was the event well run and well judged, but afterwards, competitors were provided a VIP tour of the facility.

YOUR PLAN should take into account the needs of the competitors. HOSA members who have practiced skills in a lab may feel more confident in a lab setting for competition.

YOUR PLAN must also consider your surroundings. What facilities are a reasonable distance from your hotel/conference location that may have the equipment, people, and availability to create a successful partnership?
STEP FOUR: Making Contact

There are a number of approaches that you will use when establishing an event site partnership. At some point in the process, you will use all of the approaches listed below – but the order in which you use them will vary, depending on the site you are trying to court.

- A letter
- Email
- Phone
- Face-to-face meeting

If you have a contact who can help you get a face-to-face meeting, that would be a good way to start. If not, then your letter and/or email and/or phone call will be composed to introduce your organization AND to request a meeting.

Sample Email

```
Sent: Monday, September 27, 2021 4:16 PM
To: NFD.Web@Nashville.Gov
Subject: CERT Inquiry

Dear Scott:

I work with HOSA, an organization of over 200,000 members, mostly high school students, who plan to pursue a health career. In June of 2022, our international convention will attract over 10,000 students and teachers from all over the United States, Puerto Rico, Canada, China and other nations to Nashville. One of the main reason that students come to the conference is to compete in an international competitive event, and one of our events is CERT Skills.

HOSA has a partnership with the Medical Reserve Corps and National CERT, and worked with National CERT when developing our CERT Skills event.

Would you be willing to meet with me to determine if National Fire Department Training Acadmey would be interested in working with HOSA in implementing our CERT Skills event during our June conference? My schedule is flexible.

Thank you for your consideration of this request!

Bergen

Bergen Morehouse
Director, Competitive Events
National HOSA
Bergen morehouse@hosa.org
www.hosa.org
```
Sample Initial Contact Letter

- Use your state letterhead
- Copy and paste the keystrokes below, but BE SURE you add the correct information to your letter, and proofread to be sure you made all the necessary corrections.

Date

Contact Name
Address

Dear ___________________.

HOSA-Future Health Professionals, is an international student organization in high schools, technical schools, and colleges. We are pleased to request a partnership with Belmont University for the HOSA International Leadership Conference to be held in June in Nashville, Florida. During the conference, HOSA requests that Valencia College play host to students from 48 different states and Puerto-Rico and China as well as our international charters as part of the HOSA Competitive Events program. Your campus would be the host site for three international events, including Dental Science, Nursing Assisting and Clinical Nursing on either Thursday, June 23 or Friday, June 24, 2022.

HOSA is a national student organization with over 200,000 members nationwide and internationally. Over 10,000 delegates are expected at the HOSA International Leadership Conference. State and national winners are eligible for international competition and international winners are then recognized with gold, silver, and bronze medals at the conclusion of the conference.

Belmont University was selected to host HOSA Competitive Events because of the excellent facilities and professional staff at your school. HOSA held skill events on your campus during our national conference in 2016. HOSA is very grateful to past health science faculty for their support and cooperation.

Considering the national shortage of healthcare workers, we hope that the 2019 HOSA International Leadership Conference brings positive attention to the excellent educational opportunities offered to future healthcare professionals at Belmont University. As an international organization, we appreciate the opportunity to bring our events to your campus in the interest of providing outstanding learning opportunities to HOSA-Future Health Professionals youth.

Sincerely,

Your name, title, and signature

cc: Your supervisor
   State CE Director
Sample Initial Contact Email

- This email was sent in response to an initial inquiry asking for more information.
- You may copy and paste the keystrokes below, but BE SURE you add the correct information to your letter, and proofread to be sure you made all the necessary corrections.

HOSA-Future Health Professionals will hold its Annual International Leadership Conference on June 22-25, 2022. The conference will attract over 10,000 high school and college future health professionals and over 2,000 of their teachers who are health professionals, from 48 states and Puerto Rico, China and our international charters.

A large part of the conference is the HOSA Competitive Events program – where state winners compete against other state winners in the hope of becoming a national champion. Think of it as an Olympics where the events are all health-career focused.

In 2016, we worked with several of your employees to implement our events, including hosting our Dental Science, Nursing Assisting and Clinical Nursing events.

Why should you talk to HOSA about a partnership? Two reasons:

1. An opportunity to give back. You work with a large staff of health professionals, and we suspect that somewhere along the line, someone inspired or encouraged you, and them, to succeed - perhaps someone gave you a life-changing opportunity. We are asking you and your staff to take a few hours out of your busy schedules to inspire this next generation of healthcare professionals.

2. An opportunity to share the vision of your organization. We believe that any interaction these HOSA members have with your company’s values will plant seeds of integrity and excellence that they will take back home with them when the conference is over.

In addition to over 80 competitive events, our convention includes two days of breakout workshops and three general sessions. Previous speakers have been the U.S. Surgeon General, Vivak Murthy and VADM Jerome M. Adams, Brad Montague, Creator of Kid President and Dr. Rick Rigsby, motivation speaker.

I will stop by your office this afternoon and drop off some print information and a convention program from the last two years. Once you have a chance to look over the materials, I will be back in touch to request a meeting.
STEP FIVE: The Initial Site Visit

1. **Confirm your site visit in writing**, being sure you know the date, time, and location of the meeting, and the people you are meeting with.

2. **Do your research** and learn as much as you can about the site you will be visiting. The more you know about them, the easier it will be for you to move forward with a plan.

3. **Prepare your leave behinds.** We always like to bring one or two extra leave behinds in case extra people participate in the meeting. If you know what event(s) you hope to locate at that site, bring everyone a set of the event guidelines.

4. **Final Preparations.** **Dress to impress** - and bring your camera, calendar, and partially completed Event Site Planning Worksheet.

5. **Arrive early.** We like to arrive 15 minutes early to allow time to take photos of the outside of the building, parking areas, possible bus drop-off locations, and the surroundings. We try to picture a charter bus arriving with our students, where they will park, etc.

   We usually review our notes until ten minutes before our appointment, and then we go to the appointed location. We like to be early, but not too early.

6. After the initial introductions, thank them for this opportunity, and then **explain yourself, your organization, and your request** - in roughly 5 minutes. Then listen carefully to them and answer their questions.

7. **Tour the facility.** Ask if they have a floor plan for you to refer to. Ask permission to take pictures, and take a lot of them. What you want to know is the specific layout and equipment they have. That information will help you make a decision about the feasibility for the location as an event site, and what skills could reasonably be performed.

8. Sit back down and fill out the rest of the information requested in the **Event Site Planning Worksheet.** (You will use this document when composing your Site Agreement.) When all your questions and their questions have been answered, agree to a plan for follow-up. If you are local, you will likely want to follow-up with another visit. If not, agree to the next steps in this partnership before you leave the site.

9. **Within 24 hours of the initial visit, send a follow-up thank you card or email.**

10. Create a draft written **Site Agreement**, and follow up with the site as you agreed.
**EVENT SITE PLANNING WORKSHEET**

**MEETING INFORMATION**

<table>
<thead>
<tr>
<th>Site Address</th>
<th>COMMENTS</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Site website</th>
<th>COMMENTS</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Contact Person(s)</th>
<th>COMMENTS</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Email</th>
<th>COMMENTS</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Date, Time and Location for Meeting</th>
<th>COMMENTS</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**HOSA EVENT INFORMATION**

<table>
<thead>
<tr>
<th>Date of HOSA Event</th>
<th>COMMENTS</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Time Schedule*</th>
<th>COMMENTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>__________</td>
<td></td>
</tr>
<tr>
<td>HOSA event personnel arrive (1 hr)</td>
<td></td>
</tr>
<tr>
<td>________</td>
<td></td>
</tr>
<tr>
<td>Judge meal and orientation (1 hr)</td>
<td></td>
</tr>
<tr>
<td>________</td>
<td></td>
</tr>
<tr>
<td>Competitors arrive</td>
<td></td>
</tr>
<tr>
<td>________</td>
<td></td>
</tr>
<tr>
<td>Actual competition (2 – 3 hrs)</td>
<td></td>
</tr>
<tr>
<td>________</td>
<td></td>
</tr>
<tr>
<td>All competitors depart</td>
<td></td>
</tr>
<tr>
<td>________</td>
<td></td>
</tr>
<tr>
<td>HOSA event personnel depart</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Proposed Events and Skills</th>
<th>COMMENTS</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**EVENT JUDGE INFORMATION**

<table>
<thead>
<tr>
<th># of Students</th>
<th>COMMENTS</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th># of Advisors</th>
<th>COMMENTS</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th># Judges Needed</th>
<th>COMMENTS</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Skills or credential needed to judge</th>
<th>COMMENTS</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Will the site provide judges?</th>
<th>COMMENTS</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Judge report time and location</th>
<th>COMMENTS</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>
**Event Site Planning Worksheet (continued)**

<table>
<thead>
<tr>
<th>Site Requirements for ____________________ (Event)</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Competition Rooms</td>
<td></td>
</tr>
<tr>
<td>Bus drop-off/pick-up</td>
<td></td>
</tr>
<tr>
<td>Holding room for arriving competitors</td>
<td></td>
</tr>
<tr>
<td>Holding room/area after competing</td>
<td></td>
</tr>
<tr>
<td>Facility/area contact during event</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Planning Information</th>
<th>Comments</th>
</tr>
</thead>
</table>
| HOSA responsibilities | • HOSA provides the personnel to run the event(s).  
                      | • HOSA will work with judges from the site – or provide judges from the community.  
                      | • HOSA will bring consumable supplies OR reimburse the facility for any supplies that are used.  
                      | • HOSA provides a light catered meal for judges, site reps, and event leadership. |
| Caterer              |          |
| (As recommended by the site.)                    |          |
| Site Appreciation   | □ Advertisement in convention program.  
                      □ Complementary exhibit table.  
                      □ Educational symposium. |
| Follow-Up Site Visit(s)                           |          |

* The time schedule will vary depending on the number of sections, the number of competitors, and the amount of time allowed for each skill.
HOSA CLINICAL SITE AGREEMENT

Date of Event: Thursday, June 23 OR Friday, June 24, 2021
Time of Event: 7:30 am – 11:30 am (TBD)
Location: Nashville Zoo Veterinary Services

Contact: Rick Schwartz, President & Chief Executive Officer
Dr. Heather Roberston, Director Of Veterinary Service

An important part of the HOSA National Leadership conference involves the clinical sites that host specific skill events. Students in skill events take a test at the conference hotel and the highest scoring students travel to a clinical site to demonstrate selected career skills for a group of judges. The students who earn the highest scores are recognized as national winners in a formal awards ceremony at the conclusion of the conference.

HOSA is pleased to offer this clinical site agreement to Nashville Zoo, Veterinary Services, as host of the Veterinary Assisting event.

These events will involve approximately 25 students, 4 adult advisors and ___ judges.

SITE REQUIREMENTS – VETERINARY SCIENCE

- Laboratory (event) space – _____________________________
- Judge orientation and continental breakfast – _____________________________
- Holding room for arriving competitors – _____________________________
- Bus drop-off/pick-up – _____________________________
- Room or space (area) for students to go and wait for the bus to return them to the hotel. _____________________________
- Other flow instructions _____________________________
- Facility representative at the site on the day of the event

HOSA REQUIREMENTS

- HOSA provides the competitors and personnel to run the events.
- HOSA works with the site to involve site judges.
- HOSA brings all consumable supplies used during the events.
- HOSA provides a light breakfast for the judges and personnel from the site who are present during the actual event.

PLANNING PROCESS

HOSA event managers will make an appointment to visit the event site on Tuesday, June 21, to finalize plans and assure that everything is ready for the actual events to be held on June 24.
SITE APPRECIATION

HOSA is extremely grateful to the medical and educational facilities who host our events. To show our appreciation:

- HOSA will promote your school and program with an article in the HOSA E-magazine
- HOSA is pleased to offer a complimentary exhibit table at the HOSA National Leadership Conference Healthcare Exposition.
- HOSA offers an opportunity to present programs/presentations of interest to HOSA members as part of our Educational Symposium
- HOSA invites you to join us at our Wednesday night Opening Session and to sit in the VIP section at Opryland Resort where you will experience the enthusiasm and excitement of 12,000 high school and college students who are tomorrow’s healthcare professionals!

SITE COORDINATION

National HOSA: Bergen Morehouse
Director, Competitive Events
National HOSA Office
548 Silicon Drive, Suite 101
Southlake, TX 76092
(800) 321-HOSA
Bergen.morehouse@hosa.org
STEP SIX: Take Care of the Details

Once you are able to establish an industry partnership of any kind – TAKE GOOD CARE OF IT! Learn to treat the partner with respect and gratitude, mostly because it is the right thing to do, and partly because you never know when you will need to go back and ask again.

Communication

The communication rule for partnerships is GENEROUS COMMUNICATION! Effective and frequent communication is critical to partnership success, and lack of communication is the quickest way to sabotage your relationship with a healthcare partner. At the national level, we make our initial contact about 9 months out, and then “touch base” at least once a month to assure that our plans are progressing smoothly.

Judges

More and more we are finding that most of the time, event sites will provide and prepare their faculty, students, and/or alumni to serve as judges.

Event Management Details

Leave no stone unturned when planning for clinical site events. You should know EXACTLY who is doing what, and when. You should plan out every move that competitors will make, and everything they will use or touch. You should make sure that event personnel are on the same page as you, and know exactly how every part of the event will run.

Empowerment

You cannot be in more than one place at a time, and most likely, you will not be traveling to the event site during the skill event. Consequently, you need to empower an advisor or other qualified person to take over the management of the event. Sometimes this is done from the initial site contact. Sometimes you turn over the details of event management after the initial visit. Whatever you decide, be sure that the person who is responsible for the success of the event has all the information he/she needs to successfully manage the event, and to make decisions onsite that are consistent with the vision developed during the site planning process.

Don’t Forget to Say Thanks

An appreciation plaque goes a long way in saying thank you, and reminding the site their efforts on behalf of HOSA made a positive difference for tomorrow’s healthcare professionals.

Never lose sight of the goal:
To provide an outstanding event experience for HOSA members.