

Conducting Aging Services Technologies Demonstration Events at the State Level:

A Guide for AAHSA State Affiliate Associations

December 2008

(revised February 2009)

**Conducting Aging Services Technologies
Demonstration Events at the State Level:
A Guide for AAHSA State Affiliate Associations**



Center for Aging Services Technologies

A program of the
American Association of Homes
and Services for the Aging (AAHSA)

2519 Connecticut Ave., NW
Washington, DC 20008-1520
Phone (202) 508-9416
Fax (202) 220-0032

Web site: www.agingtech.org

© **Copyright 2008 AAHSA**

Document Purpose

The purpose of this document is to serve as a guide for AAHSA State affiliate Associations to plan and execute Technology Demonstrations in their State. This document should provide you with a good understanding of the high level strategies and tactics needed for a successful technology demonstration. This document is not, however, a template to follow verbatim. There is no one correct way to plan a technology demonstration.

Tips for Success

Before deciding to do a technology demonstration, consider the following tips:

1. Determine the primary goal of the technology demonstration, demonstrations for policy makers differ from demonstrations aimed at educating providers or the general public.
2. Read this document entirely.
3. Discuss the opportunity with others:
 - a. Conduct a SWOT (strengths weaknesses opportunities threats) with one or more of the following: Senior Staff, Board of Directors, AAHSA Regional Vice President.
 - b. Interview other States that completed technology demonstrations. Ask questions about their experience: What went right? What went wrong? If they were going to do it over again what would they do differently?
4. Ensure you have the appropriate resources to accomplish a successful technology demonstration, which include human resources, financial resources, and the will to make it happen!

Timeline and Key Milestones

Following is a general timeline with key milestones listed.

4+ Months Out

- Decision to move forward with technology demonstration
- Secure venue
- Determine resources and budget
- Determine purpose and goals (who what when where how why)
- Determine theme
- Determine format
- Determine schedule of events for technology demonstration

- Schedule internal kickoff meeting

3 Months Out

- Develop exhibitor kit
- Determine equipment needs
- Develop marketing plan
- Develop PR plan
- Develop operations plan
- Develop collateral

2 Months Out

- Recruit and finalize exhibitors
 - Develop exhibitor leads list
- Develop contacts list
- Determine VIP guest list
- Determine and plan special events
- Collect needed materials
 - Exhibitor logos, descriptions, etc. for marketing material
- Communicate logistics to exhibitors
- Ensure exhibitor needs can be met
 - These are technology demos and will most likely need Internet connectivity and electric power
- Develop media list

One Month Out

- Develop floor plan
- Schedule final teleconference with exhibitors, committee and staff
- Develop staff assignments
- Order all food and beverage

Two Weeks Out

- Pitch to media

- Adjustments to food and beverage

One Week Out

- Media follow up
- VIP guest follow up
- Final confirmations

Day Before

- Final logistics email to exhibitors, staff, and volunteers
- Print staff guide books/material for staff onsite
- Last-minute onsite food and beverage adjustments

Technology Demonstration Day

- Make sure its successful

After

- Press follow up
- Committee debrief
- Internal staff debrief
 - Next steps and action items

Deliverables List

- SWOT analysis template
- Contacts list template
- Committee action items/minutes e-mail template
- Project plan template
- Budget template
- Schedule of events template
- Sample exhibitor application

Technology Demonstration

Following is a guide to planning technology demonstrations; we will make distinction between technology demonstrations with an advocacy focus, and those for educational purposes where appropriate.

SECTION 1: FOUR OR MORE MONTHS

Below are the activities that take place four or more months before a technology demonstration. They are not necessarily in absolute order.

Decision to move forward with technology demonstration

Discuss the opportunity for a technology demonstration and get approval to move forward with the project. Below are suggested activities to help you make your decision:

1. Document who, what, when, where and (most importantly) why you want to do a technology demonstration and brainstorm on how to best attain the potential goals.
2. Conduct a SWOT (strengths weaknesses opportunities threats) with one or more of the following: Senior Staff, Board of Directors, AAHSA Regional Vice President.
3. Interview other States that completed technology demonstrations with a similar focus (advocacy or education). Ask questions about their experience: What went right? What went wrong? If they were going to do it over again what would they do differently?

Determine Objectives and Goals

The objectives and goals should be discussed and decided upon right at the beginning of the planning. Decisions will be made throughout the planning process based on the goals that are set. Goals should pass the SMAC test (specific, measurable, achievable, and challenging).

Example objective: To educate policymakers in the State of [] about technologies that are improving care and services for the aging by holding a demonstration where they can experience the technologies in action.

Example goal: The Governor or Senior staff member will tour the technology demonstration.

Example goal: [] technology companies will participate in the technology demonstration.

Example goal: [\$] in revenue will be generated from paid technology exhibit tables at the Annual Meeting.

Example goal: Connecting local provider community to [] university research groups.

Your objectives and goals may also reflect any criteria or preferences for the types of technologies you wish to show. For example, state-based technology demonstrations work best if you involve local universities and research institutions or companies with offices in the state or companies or universities that do business with aging services providers in the state.

If the focus of your Event is Advocacy Brainstorm policy “ask.”

All advocacy technology demos should have a specific policy “ask.” This “ask” should guide objectives and goals, theme and overall strategy, including your media and PR strategy.

Secure venue

You should secure a location for the demonstration as soon as possible. For demonstrations with an advocacy focus, it is suggested that you use a high profile government building where it is likely you will be able to get more policymakers to attend. The lobby of your State Capitol building is *strongly* recommended because it increases the chances your Governor and/or other high-ranking officials will be able to attend.

Potential locations for events with advocacy focus

- State Capitol
- Other Government building close to the State Capitol
- Local exhibition hall
- Nearby college campus
- Local school gymnasium
- Provider facility

Things to consider when choosing a venue for a technology demonstration with advocacy focus

- Overall goals of the technology demo
- VIP guests you want to attend (Since Government buildings are secure, you will make it easy for them to get to you)
- Availability of locations on your desired date and time frame
- Budget (You may need to pay for your venue while others may be free)
- Proximity to legislative hearing room if holding in conjunction with informational hearing (perhaps in the same room)

For demonstrations with an education focus, it is suggested that you use a meeting room or exhibit space in the conference facility you are using for your meeting. Consider space size and location. If you want to maximize the number of technology demonstrations then you want to look for a larger space. You also want to be “where the traffic is.” If the space is not in a high traffic area, you may need to look at ways to generate traffic to that direction. Having food and beverages or receptions in the exhibit area seems to work well to generate traffic.

Secure sponsor (optional)

For advocacy technology demonstrations, it is strongly recommended to have a legislative committee serve as “sponsor” for the technology demo. This will help to provide a sense of commitment for the technology demo and it will help your legislative staff accomplish the goals you have established.

Securing a legislative committee sponsor is essential for holding an informational hearing in conjunction with the technology demonstration.

Select a date and time frame

Timing is everything when it comes to influencing policy. First and foremost, consult with your legislative staff to select an ideal date based on the policy schedule and your objectives. Look at the calendar for potential dates for the technology demonstration and choose the best option. Although you might like to choose a date when the Governor is guaranteed to attend, it is nearly impossible to get on a schedule before choosing a date.

Thing to consider when selecting a date for a demonstration with Advocacy focus

- Avoid weekends and Government holiday weeks
- Avoid the week before and after a scheduled recess
- Availability of the desired location
- Availability of the desired location

You don’t need to pin down the exact time the demonstrations will run, but you should have a general time frame in mind. It is recommended that you choose a time frame that will allow VIPs and media to attend. If possible, the time frame should cover the breakfast and lunch crowds. A time frame that seems to work well is 9AM – 2PM.

If you are planning a technology demonstration with educational focus, look at the calendar for potential dates and times and choose the best option. If you are hosting a special technology demo and an exhibit hall, you want to make sure these schedules don’t conflict so that interested technology

companies can participate in both. Based on experience, four to eight hours appears to provide adequate time for a technology demonstration.

Thing to consider when selecting a date and time frame for a demonstration with educational focus:

- Availability of the desired location
- Conference schedule – don't overlap other important events where you are trying to drive traffic
- Budget for food and beverage – if you don't have dollars to provide enough food and beverages for the attendees and exhibitors then adjust the time accordingly

Determine resources and budget

Key to the success of technology demonstration, are adequate resources and budget. Following are guidelines for determining the costs of holding a technology demonstration.

Human Resources

Following is a list of suggested staff for the technology demonstration planning committee. Some of these roles may be handled by multiple staff and others may not be included at all.

- Project manager – manages the overall operations and planning for the technology demonstration; maintains a project plan of key tasks and deliverables; maintains the budget; coordinates and manages the planning committee calls; communicates with internal and external stakeholders as needed
- Communications staff – manages the marketing and communications strategy for the technology demonstration
- PR staff – manages the public relations strategy for the technology demonstration.
- If your event has an advocacy focus, engaging government affairs staff is key to the success of the event. Government affairs staff – manages the policy strategy for the technology demonstration. Networks with policy staff and introduces your “ask.” Secures policy VIPs. If you do not have advocacy or government affairs staff, you could hire a consultant to work with you to plan a successful event
- Other staff and volunteers to form a planning committee

Other resources

Determine if there are other resources you can take advantage of in the planning process.

- Equipment and supplies
- Special connections in the Government or media
- Vendor relationships

Budget

There are a number of items you can expect to be in the budget.

- Food and beverage – Amount to budget depends on the length of the technology demonstration
 - Half-day
 - 9AM-12PM include continental breakfast and beverages all morning
 - 12PM-4PM include lunch or dessert and beverages
 - Full-day
 - 9AM-4PM – include continental breakfast, lunch and beverages all day
 - Reception
 - 4-6PM include hors d'oeuvres and beverages
- Costs associated with marketing and public relations, including print and electronic collateral, onsite decorations, and signage
- Consulting services (professional marketing, PR, event planning, graphics design and printing services you may require)
- Equipment rental (table and 2 chairs for each exhibitor)

Based on the estimated budget, you may decide to charge exhibitors or fundraise for the event to defray the costs. Be aware, however, that given the other costs associated with exhibiting (travel, shipping materials, etc.), a fee may discourage some technology companies from participating.

Determine theme

The technology demonstration should have a theme related to the goals. For example: “Imagine – the Future of Aging in [State]” or “Technologies for Aging in [State.]” The theme should be short, creative and descriptive. Keep in mind, the theme will be used throughout the marketing and public relations activities and having a strong theme is important.

Determine format

To achieve the greatest success in meeting your goals and make the event worthwhile for all involved you should consider various format components for your demonstration. For example, if you seek substantial attendance by legislative staff, we recommend you consider holding the demonstration in conjunction with a legislative informational hearing. In this format, an expert panel (CAST technology company and provider members, university researchers, etc.) kicks-off the demonstration by giving an overview (to legislators/staff) of the value of aging services technologies for older adults and why it is of interest to the state and the policy community (i.e., facilitates an integrated healthcare system, more

efficient use of care resources, increase or maintain number of persons served in state programs, increase elders' independence and delay more expensive care, increase safety and quality of life, etc).

Another format component to consider is holding the demonstration in conjunction with one of your Association's regular conferences (preferably one that includes a policy focus) to facilitate greater attendance by aging service provider members and provide a unique opportunity to mingle with policymakers. Finally, you may also want to consider having aging service providers in your state co-exhibit together with the technology solutions they are currently utilizing to provide concrete examples of how technology is transforming aging services.

Determine schedule of events

The schedule of events for the technology demonstration day will change and grow throughout the planning process; however, it is important to start developing the schedule right off the bat.

Things to consider when developing the schedule of events

- Time the space can be accessed
- Time to set up and break down the tables and chairs
- Time for exhibitor set up and break down, usually no less than one hour
- Time periods for food and beverage
- Time for policy hearing, special announcements, panel presentations or guest speeches, VIP tours, media interviews etc

Determine attendee strategy

With advocacy-related technology demos, you usually don't have access to a guaranteed body of attendees. However, you need people for the exhibitors to demo the technology to while waiting for policy and legislative staff, special events and media tours. You also want attendees to set up the atmosphere during the important "big events." Plan how you will generate attendees in addition to promoting the event as a public forum for the policy community. Consider holding the demonstration in conjunction with your Association conference and/or work with local aging service providers and universities to organize additional attendees.

Schedule kickoff meeting

Once you have some of the above key elements in place, you should have a meeting to kickoff the project. This will give a chance for everyone to review the objectives and goals, individual roles and responsibilities and key milestones and deliverables.

SECTION 2: THREE MONTHS

Develop exhibitor kit

You'll want to put together information for exhibitors. It is recommended that you create the information in electronic format and share with exhibitors over e-mail. In addition, you may want to print and mail an exhibitor kit.

- Application to exhibit – this will allow you to gather important information for the company/ university, such as contacts, descriptions of the technology demonstration, and benefit to seniors; if there are research papers documenting these benefits, that would be very helpful for policy makers' staff
- Exhibitor information form – include details about the technology demonstration including goals, cost (if applicable), set up and break down times, list of equipment that will or will not be provided, travel/hotel information, contact information
- Floor plan – you can provide a sample floor plan to exhibitors if you intend to let them select their location. Otherwise, you can assign spaces and provide a floor plan after all the tables have been selected

Determine equipment needs

Make a list for any equipment you will need for the technology demonstration.

- A/V needs
 - Podium, microphone, speakers
- Exhibitor needs
 - Table and two chairs per exhibitor
 - Extension cords and power strips
 - Internet connectivity wired/ wireless
- Food and beverages
 - Tables and skirting

Develop exhibitor leads list

As soon as possible, a leads list for exhibitors should be developed. Create a spreadsheet with exhibitor contact information, type of technology, and status (e.g. invited, accepted, application submitted). Make sure your exhibitor leads list is comparable to the exhibit space. For example, if there is space for 15 tables, you may want to try to develop a leads list of at least 15 demonstrations.

Sources for Exhibitor Leads

- CAST membership
- State Universities and Colleges
- Past State meeting exhibitors
- State chapter of Better Business Bureau
- Internet search for technology companies in your state

Develop marketing and public relations plans

The marketing and PR plans will evolve throughout the planning. They should be developed around the objectives and goals already identified. The plan should contain a list of deliverables and information about the development and production for each. Consider the use of both print and electronic formats.

Sample Marketing Deliverables

- Technology demonstration announcement
- Description of technology demonstrations
- Schedule of events
- FAQs
- Onsite material (program, flyer, floor plan)

Sample PR Deliverables

- Technology Demonstration Messages
- Press Release
- Media Advisory
- Fact Sheet
- Backgrounder
- Policy Issue Brief (very important for an advocacy-focused technology demo)
- Press Kit (may contain any of the above)

Develop operations plan

The operations plan should contain any processes and procedures needed for running the planning committee. A simple list of recurring tasks, such as committee meetings and project plan management, may be sufficient. The operations plan should be a tool for the project manager to effectively lead a successful project.

Develop collateral

The marketing and public relations collateral should be developed. The marketing collateral will be needed before the PR collateral. The PR messages are the most important to develop three months out.

SECTION 3: TWO MONTHS OUT

Recruit and finalize exhibitors

Using the marketing collateral and exhibitor leads list, begin recruiting exhibitors. You should allow two weeks to promote the opportunity and another two weeks for exhibitors to complete the application. You want to have a final exhibitor list at least one month before the technology demonstration so it is important to begin recruiting exhibitors as soon as possible.

Develop contacts list

As exhibitors are confirmed include them in a contacts spreadsheet along with any other key contacts, such as staff, government affairs, and PR contacts. This list can be used internally or shared as needed.

Determine VIP guest list

To bring excitement and credibility to the event and to attract media, you should have VIPs attend the technology demonstration. Ideally, the Governor or a Senior Staff member will attend and deliver remarks at some point during the technology demonstration day. You should begin reaching out to the schedulers about two months out to determine the likelihood of securing the Governor. You may also consider other potential VIPs that may be part of the remarks, including the CEO for the State Association and possibly CEOs of some of the exhibiting companies, Presidents and Deans of exhibiting Universities, Schools and Colleges, in addition to Chairs and members of key Committees of State Legislators relevant to the “ask”, goals and objectives of the event. Work with your legislative staff to secure VIPs. Focus on who should attend to help you achieve your policy goals and who could possibly attend that would help entice government VIPs to attend, such as company CEOs and high ranking University officials.

Determine and plan special events

You may want to plan special events during the technology demonstration, such as an informational policy hearing, private tours for media and VIP guest, welcoming remarks, press conference (if appropriate) or a reception. The tours should be led by a technology guru-spokesperson. You should plan a tour that would last 20-30 minutes and include the most exciting four to five tables. Welcoming remarks can occur right in the morning or during the noon hour. The host should provide a brief welcome and introduction of the speaker, and the most senior government official present. You can consider a closing reception if it is convenient for a VIP to attend late in the day.

Exhibitor support

You will need to collect all the materials you need for the event from exhibitors. These may include company logos and descriptions or other information needed for marketing or PR material.

Communicate logistics to exhibitors

Be sure to communicate frequently with exhibitors. They will need to know information such as:

- Set up and tear down times
- Schedule of events for the demo period (media opportunities or special guest tours)
- Requirements or limitations for the booth space
 - Ensure exhibitor needs can be met. Can electricity and Internet be provided?
- What's included in the cost of the exhibit space
- Expenses they should be expected to cover after paying for the space (e.g. internet, electricity, signage)

Develop media list

If you plan to attract media to cover the technology demonstration, you should develop a list of media leads. Work with your media staff on the media strategy. In general, media will be drawn to “news.” What story can you pitch to them? What technologies will they get to experience? Consider holding a press conference only when appropriate (for example state senate approved a relevant bill as a result of the event).

Local media will be most likely to attend. Consider reaching out to local television stations and newspapers.

SECTION 4: ONE MONTH OUT

Develop floor plan

You will need to develop an exhibitor floor plan and assign exhibitors to a space. Consider in the floor plan design if you would like to have like technologies placed together (e.g. remote monitoring, electronic health record software).

Develop staff assignments

The day of the technology demonstration you will need a number of staff to be on-hand for the event. The amount of staff support you need will depend on the size of the demonstration and any special events that will occur. Use the schedule of events to create a task list and assign staff responsible for each task.

Order all food and beverage

Place your orders for the food and beverage you need for the event. Some caterers require a guarantee and others do not. Calculate your food needs based on the number of confirmed participants and projected attendance. Confirm with the caterer that you have can make changes to the order if needed. Don't forget to consider dietary needs when ordering food. Be sure to order some food that is vegan, vegetarian and gluten-free.

Schedule final teleconference

You will want to have a final teleconference to review logistics with exhibitors, planning committee and staff. It is a good idea to schedule this call in advance to accommodate busy schedules and to allow for adequate preparation time.

Continue planning

Work with your team to keep on target with tasks according to the project plan.

SECTION 5: TWO WEEKS OUT

Pitch to media

Work with your media staff to execute the media strategy. Usually, the media pitches will occur one to two weeks before the technology demo.

Adjustments to food and beverage

Make any necessary changes to food and beverage orders based on confirmed participants.

SECTION 6: ONE WEEK OUT, DAY BEFORE, DEMO DAY, AFTER

Make your final follow-ups including:

- Media follow up
- VIP guest follow up
- Final logistics email to exhibitors, staff, and volunteers
- Print staff guide books/material for staff onsite
- Last-minute onsite food and beverage adjustments
- Any other final confirmations

Technology Demonstration Day

- Arrive early – at least an hour before exhibitors. Review any important logistics with staff
- Make sure the tables are set up according to the floor plan
 - Signage, skirting, Internet and electrical
- Make sure exhibitors have arrived and set-up is successful
- Be sure attendee sign-in sheets are in place and staffed
- Make sure all the special events are successful
- Confirm the tear-down time and logistics with exhibitors

After the event

In the weeks following the event, consider the following follow-up activities.

- Press follow up
 - Track news stories and articles. Follow up with media as needed to confirm publication of stories
- Committee debrief
 - Debrief with the entire planning committee after the event to discuss outcomes and lessons learned
- Internal staff debrief
 - Debrief with other staff with a primary role in the event
- Brainstorm, discuss and follow-up on next steps and action items
 - Thank you's to attendees, exhibitors, VIPs or other special guests

ABOUT CAST

The Center for Aging Services Technologies (CAST) is leading the charge to expedite the development, evaluation and adoption of emerging technologies that will transform the aging experience.

CAST four focus areas:

- 1. Driving a global vision of how technologies can improve the quality of life for seniors while reducing health care costs;**
- 2. Accelerating technology research and development through pilot evaluations with seniors;**
- 3. Advocating to remove barriers to the rapid commercialization of proven solutions; and**
- 4. Promoting dialogue about standards to ensure interoperability and widespread access to aging-services technologies.**

CAST is now an international coalition of more than 400 technology companies, aging-services organizations, businesses, research universities and government representatives working together under the auspices of the American Association of Homes and Services for the Aging (www.aahsa.org). The members of AAHSA help millions of individuals and their families every day through mission-driven, not-for-profit organizations dedicated to providing the services that people need, when they need them, in the place they call home.

CONTACT CAST

Majd Alwan, Ph.D, Director
(202) 508-9463
malwan@agingtech.org

JOIN CAST

Members and Sponsors receive a wide variety of benefits. Please visit our Web site www.agingtech.org/join.aspx for a full listing of benefits and dues structure.



Center for Aging Services Technologies

2519 Connecticut Avenue, NW
Washington, DC 20008-1520
www.agingtech.org

Phone (202) 508-9463
Fax (202) 939-5812