

# PROGRAM MANAGEMENT CHART

| ROLE  | RESPONSIBILITY  | NLC LOCATION                                    |
|---|---|---|
| Director<br>Co-Director                                   | <ul style="list-style-type: none"> <li>- Coordinate CE meeting</li> <li>- Manage CE Headquarters</li> <li>- Support/assist CE personnel</li> <li>- Communicate with Category Chairs</li> <li>- Coordination of CE State Sponsor Orientation</li> <li>- Oversee Technical Advisory Committees</li> </ul>   | CE<br>Headquarters                              |
| Category<br>Chairs (5)                                    | <ul style="list-style-type: none"> <li>- Category leadership/coordination</li> <li>- Writes/reviews initial event specifications for equipment/supplies, sectioning, etc.</li> <li>- Judge orientation - welcome, introductions</li> <li>- Final results/script approval</li> <li>- Assures all materials are ready for the event (Tests, checking resources, etc.)</li> </ul>  | CE<br>Headquarters                              |
| Lieutenants<br>(13)                                       | <ul style="list-style-type: none"> <li>- Manage event leadership and equipment/materials details</li> <li>- Liaison between HQ, event site, event managers (Discusses event management personnel needs with Event Manager/State Sponsor Coordinator)</li> <li>- Event orientation - State sponsor/event manager</li> <li>- Assist with judge orientation in Category II only</li> <li>- Selects preferred skills for Category II</li> <li>- Writes first draft scenario/secret topics</li> <li>- Talks with site host and coordinates facility arrangements/equipment and supplies</li> </ul> | Pre-NLC site<br>visits, on-site<br>coordination |
| State<br>Advisor  | <ul style="list-style-type: none"> <li>- Select and notify state sponsor/event managers/section leaders/personnel in writing</li> <li>- Support and recognize state event personnel</li> </ul>  | On site as<br>needed                            |
| State<br>Sponsor/<br>Event<br>Manager (1-<br>2 per event) | <ul style="list-style-type: none"> <li>- Communicate with CE Lieutenant/Chairman prior to NLC</li> <li>- Communicate with state event personnel prior to NLC</li> <li>- Attend State Sponsor/Event Manager orientation</li> <li>- Assure all personnel will be available and ready for event</li> <li>- Orient event section leaders/personnel</li> <li>- Eat with and orient Judges at meal function (1-2 per state)</li> <li>- Orient competitors</li> <li>- Manage "outside" of event (event personnel)</li> <li>- Verify event scores</li> <li>- Rank top 10 in Category II</li> </ul>    | On-site   |
| Section<br>Leaders<br>(1 per<br>section)                  | <ul style="list-style-type: none"> <li>- Manage their section of the event</li> <li>- "Inside" management of event - judges, competitors, and event assistants</li> <li>- Assure event runs on time</li> <li>- Preparation of event site during judge orientation</li> <li>- Section score tally</li> <li>- Oversees clean-up of event site after event</li> </ul>  | On-site   |

# EVENT MANAGEMENT PRACTICES

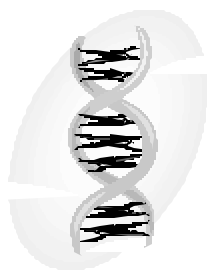
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## Purpose

The Competitive Events Program is designed to motivate HOSA members and provide a system for recognizing the competencies developed by members through Health Occupations Education class instruction, related job training, and HOSA related activities.



## Philosophy



Competitive events are designed to motivate HOSA members in the Health Occupations classroom to improve their knowledge and skills. HOSA does not provide competition for competition's sake; rather, HOSA provides a national competitive events program as a means of recognizing those students who are willing to pursue excellence by preparing for competition and having the determination to attend a conference and demonstrate the competencies gained through the Health Occupations program.

## General Rules and Regulations

All members of the CE Program must be very familiar with the General Rules and Regulations for HOSA Competitive Events - found in the front of Section B of the **HOSA Handbook**.

## Event Management Ethics

Ethics rule of thumb: **if it can be avoided, avoid it!** While all competitive event personnel are trusted implicitly, most prefer **NOT** to be in a situation where they are making decisions about their students. For example, if a secondary advisor has a student competing, let the advisor judge postsecondary/collegiate. The same rule holds true with breaking ties or making inquiry decisions. Generally, sensitive situations can and should be avoided. Go to your event lieutenant or chairman for their assistance.



## Responsibility

Competitive Events management is truly a team effort. 99% of the event process is conducted by volunteers who have a vested interest in the future of health care in America. Working together towards a common goal, it is the responsibility of everyone involved in the Competitive Event process to make the event a positive experience for HOSA members.

# Priorities for Competitive Events

- i **MAKE IT FUN!** Competitive event participation should be the highlight of the member's year.
- i **Quality** Always!
- i Fairness to all; decisions should favor HOSA members whenever possible.
- i **Positive Event Environment** (Competitors and event personnel are our customers. Make them happy! Circulate, assist and encourage them.)
- i Follow the event guidelines. (Avoid personal interpretation of the guidelines. Don't trust your memory. Take the time to look in the **HOSA Handbook!**)
- i **NO ERRORS!** (Triple check everything.)
- i **Plan to the detail** (Know who is doing what. Be specific!)
- i Time Management (Plan for the event to run on time - keep it on schedule if at all possible.)
- i **Go to "Plan B" if it meets the "Priorities."** (Sometimes, unusual circumstances arise and event personnel must make adjustments to the event process. In such cases, personnel must be sure that fairness to competitors is a priority. Competitors should be notified of any unusual event circumstances - preferably during the event orientation.)
- i **Judge Relations** (Judges can be HOSA's best marketing tool. Help the judges to understand the event process. Make them glad they came to help HOSA. Invite their written suggestions for improvement.)
- i **MAKE IT FUN!** Competitive events can be stressful, therefore, find ways to make the experience fun and memorable! HOSA members should be treated as our "customers."

## Event Documents

All event documents such as participant print-outs, tally sheets, scantron forms, rating sheets, etc. ARE VERY IMPORTANT. Event personnel must accurately and completely fill out forms, and be sure that all information is recorded. Often, questions arise after the Event Managers and Section Leaders have left the site/room where the events are held. Documentation must be clear and logical, with notes attached to explain anything out of the ordinary.

## Reasonable Accommodation

HOSA members with disabilities will be reasonably accommodated in national competitive events through event modification as a means of providing an equal competitive opportunity. Such members may be allowed to provide and utilize special equipment that HOSA may not be able to provide. Requests for reasonable accommodation must be indicated on the HOSA National Leadership Conference registration form and submitted to National HOSA by the May 15 deadline.



## Event Orientations

Event orientations are **IMPORTANT** and attendance is **REQUIRED**. Orientations provide an opportunity to tell competitors of any changes or modifications, and allow the competitor the chance to ask questions for clarification of rules. Orientations are designed for the competitors. Advisors/others that accompany competitors should be asked to find a seat **AFTER** all competitors have been seated.

In very large events, it is recommended to start the check-in process for teams about 30 minutes before the announced orientation starting time if the room is available. That way, teams can be checked in and seated (far apart for HOSA Bowl and Parliamentary Procedure) as they arrive, in a controlled, steady pace. This process allows more time for the actual orientation.

## Proxy Process



If for any reason a competitor cannot attend an orientation, they **must** send a proxy. A proxy is a person who represents the absent competitor, and who has a properly completed and signed proxy form to give to the event personnel when the proxy registers for the competitor.

**NOTE:** Proxies are **NOT** permitted in certain event orientations because of testing or preliminary round requirements.

## Event Conflicts

The NLC schedule is designed to avoid conflicts and overlapping of events. On occasion, conflicts may result for acceptable reasons. If and when that happens, CE staff should help event managers make the necessary adjustments to accommodate the competitor without providing an unfair advantage to others.

## Always Ask the Question

Competitive events staff members know that, at a National Leadership Conference with over 3000 competitors, anything can happen. When something happens which you don't understand, ask. It is always better to:

1. Find out what and why something happened
2. Talk to the CE Director, Co-Director, and/or HOSA Management for an explanation and/or suggestions



Follow the rules and show fairness to all competitors. "Asking the question" is not a sign of weakness; it is a responsibility.

## Disqualification



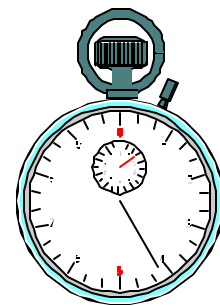
Competitors should not be disqualified and not allowed to compete **UNLESS** there is a definite violation of written guidelines. The overall cost of attending a conference is too great for a competitor to be frivolously disqualified.

Allow competitors to compete in the event, then, report any infractions to appropriate CE personnel. Post-event decisions can be made to enter a score or assess penalty points if necessary. Regardless of what happens with scoring, the HOSA member should be allowed to compete. Absolute disqualification prior to an event should be avoided.

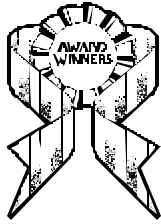
## Use of a Stop Watch

In most events, a stop watch is used to time in intervals of less than 10 minutes. In Category II, the use of a stop watch varies. What is important is to assure that the event is timed accurately and stopped at the end of time. Often, when the same procedure is performed in a room at multiple stations, all competitors are told when to start (they all start at the same time) and all are told when to stop.

HOSA Bowl **MUST** use a stop watch when timing 10 minute rounds. Judges may stop and restart a round at any time during the match.



## The Most Frequently Asked Question. . .



For many different HOSA Competitive Events, judges often suggest that HOSA should take the top performers from each section and hold finals of competition to assure that the best students win.

This issue has been addressed for many, many years. It has been understood that in order to create the time and judges needed to provide for more than one level of competition, either the number of days for the NLC would need to be increased, or fewer competitors would be allowed to participate. Note that the option of more space does not exist since HOSA already squeezes as tightly as possible into a facility, and there are few convention facilities that can hold the NLC as large as it is now while still providing a conservative price range.

For the reasons given, it is important that everyone involved in the Competitive Events process understands that HOSA provides opportunity for skill and leadership development for all HOSA members.

Competitive Events are not “CONTESTS” that prove who is the best - but rather are an opportunity for members to grow and learn in preparation for a future health career.



# COMPETITIVE EVENTS PROGRAM RESPONSIBILITIES

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*Serving on the National HOSA Competitive Events Program staff involves multiple responsibilities, both in the decision-making process and in event management. The following descriptions serve as an outline - although as with all true "team" efforts, the lines of responsibility sometimes blur as the goals of the organization and the needs of individual members are met.*

*HOSA recognizes the contributions of staff volunteers who ensure a premier HOSA National Competitive Events Program.*

## Mission Statement

The responsibilities of the Competitive Events Program are in keeping with the mission of HOSA.

***The mission of HOSA is to enhance the delivery of compassionate, quality health care by providing opportunities for knowledge, skill and leadership development of all health occupations education students, therefore, helping the students to meet the needs of the health care community.***

## Competitive Events Staffing

The Competitive Events Program was established by the HOSA Inc. Board of Directors on Tuesday, June 21, 1994, by the following motion:

94-14 We move that the Competitive Events Committee become the National Competitive Events Program operating under the management team with terms as follows:

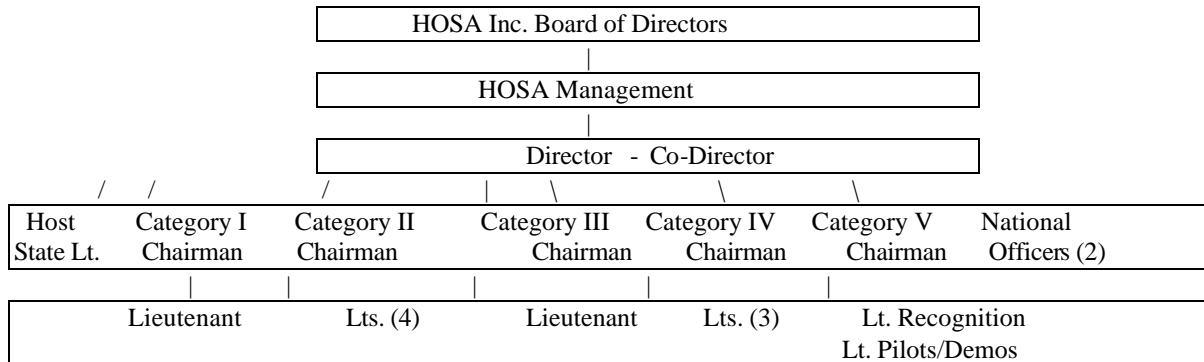
- \* Board Members serving on the Competitive Events Program will fulfill their committee assignments.
- \* Members shall be appointed by the Chairman of the Board of Directors with the recommendation of the Competitive Events Director, with at least one board member being appointed.
- \* Members may be appointed to two consecutive three year terms.
- \* A person may be re-appointed after not serving for two consecutive terms.
- \* The Director and Co-Director may serve an additional term with their tenure looking like this:

|        |             |
|--------|-------------|
| Year 1 | Co-Director |
| Year 2 | Director    |
| Year 3 | Director    |
| Year 4 | Co-Director |

The Competitive Events Program consists of twenty-one (21) voting members, including two national officers. Non-voting staff members may be designated by the same process used for voting staff members. The national officer members are appointed by the National Officer Advisor in consultation with HOSA Management.

## Program Staffing Structure

The Competitive Events Program is administered according to the structure presented below:



*Non-voting members could include the:*

- ◆ *Chairman of the HOSA Inc. Board of Directors*
- ◆ *Chair-Elect of the HOSA Inc. Board of Directors*
- ◆ *Others as designated by HOSA Management.*

Program staffing strives to maintain a diverse representation from a variety of states and representing various membership categories (Secondary and Postsecondary/ Collegiate; Local Advisor, State Advisor, Administrator, and Health Care Professional.)

All policies and practices of the Competitive Events Program are consistent with the National HOSA Bylaws and the HOSA Mission Statement.



## Staff Meetings

Competitive Events staff members make recommendations regarding event guidelines, work with health care professional organizations and publishing/medical reference companies; and attend two, full-day staff meetings annually.

### JANUARY (Day before HOSA, Inc. Board of Directors' Meeting)

|                |   |   |
|----------------|---|---|
| <b>Purpose</b> | T | Conduct business related to Competitive Events as a result of inquires to management and event guideline review |
|                | T | Review NLC Event processes  |
|                | T | Write/review scenarios/secret topics  |
|                | T | Analyze evaluations from previous NLC   |

### NLC (Monday of NLC Week)

|                |   |   |
|----------------|---|---|
| <b>Purpose</b> | T | Review TAC reports  |
|                | T | Consider agenda items related to competitive events                     |
|                | T | Submit topic recommendations for all events needed for next school year |
|                | T | Review NLC schedule/responsibilities                                    |

|                        |   |  |
|------------------------|---|--|
| <b>On Tuesday. . .</b> | T | Meet with hotel staff regarding room layouts, etc. |
|                        | T | Check tests, equipment, event materials, etc.      |

## Conference Calls

In order to fulfill the assigned responsibilities of Competitive Events, conference calls are sometimes scheduled. Staff members involved are notified in writing of scheduled conference calls. Staff members should contact National HOSA Headquarters to arrange conference calls.

## Category II (Skill Events) Process

Category II events are somewhat unique in the management process due to the numerous phone calls that must take place between event personnel and event sites away from the hotel. So, how does it work?

- Ø By September 1, each Lieutenant will pre-select 2-3 skills per event assigned and share those selections with the National HOSA Headquarters.

Ü In the fall, arrangements are made by the National HOSA Headquarters for a local person or **Local Site Coordinator (or HOST State Lieutenant)** to make initial clinical site contacts. The staff member will visit sites and ask if HOSA may hold its events in their facility - then provide the name and phone number of site contacts to HOSA Management and the Competitive Events Director.

Ü When given site contact information, the **Category II Chair** calls the Category II Lieutenants to determine who will contact sites. In addition, the Category II Chair and/or CE Director may visit event sites to discuss event management and logistics upon receiving budget approval by HOSA Management.

Either through phone contact or site visit, the CE Program staff member assigned to contact the site will ask the following questions:

- Can they manage the "procedures" selected by the event Lieutenant?
- What equipment will the site be able to supply? What must HOSA provide?
- What types of facilities are available? How many rooms are available? Is there a holding area? Is there an area for competitors to get drinks/snacks?
- Where and how can we provide for a judge's luncheon? (HOSA will reimburse judge's meals if the site makes the catering contact, and certain other expenses when approved.)

Ü Once event specifications are agreed upon, the Category II Chair and **Lieutenant** for that event discuss site and procedure information. The Lieutenant then writes the "event scenario."

Ü In addition to working directly with the people on-site, the Lieutenant also calls the **State Sponsor Coordinator/Event Manager** to:

- 9 Thank them for their state's help.
- 9 Orient them to the clinical site for the event.
- 9 Discuss the on-site process - how the event will be managed.
- 9 Discuss bus transportation arrangements.
- 9 Share status of equipment and materials.
- 9 Discuss Event personnel needs (# of sections, patients, etc.)
- 9 Share the number of competitors registered.
- 9 Discuss event orientation and testing information.

Ý During the National Leadership Conference, the Lieutenant (or his/her designee) visits the event site with the Event Manager (if possible) prior to the actual event to review all arrangements and processes.

#### **Do CE Members share selected secret procedures/scenarios?**

Usually - no. Not until the day of the on-site visit or event. If a situation arises where a CE member feels it is in the best interest of event management to discuss the selected procedures with state sponsor personnel, it is best to discuss this with the Director or HOSA Management first.

## Categories I, III, IV and V Process

After May 1, the Category Chair communicates with their Lieutenant(s) to determine who will call the State Sponsor Coordinator/Event Manager. The purpose of the call will be to share:

- 9 Event personnel needs (Number of sections, etc.)
- 9 Number of competitors registered
- 9 Event orientation (date and time) and testing information
- 9 Thanks for their help

**Note:** For all categories, the Category Chair or Lieutenant will call the State Advisor if written notification of event management personnel has not been received in the National Office by May 1.

## Event Guidelines

The National HOSA Headquarters is responsible for maintaining the integrity of the competitive event guidelines. It is the responsibility of the CE Program staff to assure that the guidelines are accurate and appropriate.

| When                      | Who             | What  |
|---------------------------|-----------------|---|
| <i>July - September</i>   | National HQ     | Revises guidelines based on CE action as evidenced by CE minutes and written editorial revision requests. Revised guidelines are sent to Co-Director. |
| <i>August - September</i> | Co-Director     | Reviews event guideline revisions. Consults with Category Chairs if necessary.  |
| <i>October</i>            | Category Chairs | Call Lieutenant(s) to determine who will take responsibility for guideline review for each event. Communicates that information to the Co-Director.   |
| <i>November</i>           | Chairs/Lts.     | Carefully analyze assigned events.* Send written recommendations for agenda items (as a result of analysis) to the Co-Director.                       |
| <i>January</i>            | CE Program      | Response to CE guideline analysis through formal meeting process.   |

\* What does "careful analysis" mean?

In the event analysis stage, the CE Program staff members are responsible for reading the guidelines carefully. Do the guidelines make sense?

The staff member may find it helpful to sit with someone who has never seen the guidelines, and identify questions which arise as the person reads the guidelines.

For events with "resources" (books and other publications) - check to be sure the resource is still available. (Remember - if you can't find it, neither can a competitor.) If new resources are needed, the staff member may make recommendations.

### **Category II Guideline Considerations**

In Category II events, the staff member will check each procedure against the designated resource. Do they agree? Check the procedure against the supply list in the guidelines. Is anything missing?

Is the event current and does it reflect acceptable practice for that particular career field? As you ask this question, keep in mind the philosophy and purpose of the HOSA Competitive Events Program. Often, it is wise to consult with health care professionals about the skills, understanding that variance in technique is usual and that HOSA follows the steps outlined in our resources. (Sometimes however, it is acceptable to change resources if agreed upon by the CE staff.)

If any event is considered to be in need of major revisions, a motion to establish a TAC (Technical Advisory Council) would be appropriate at the January Competitive Events meeting.

**Finally, it is the responsibility of all Competitive Events staff members to be intimately acquainted with the Introductory Information in the National HOSA Handbook, Section B.**

## Technical Advisory Councils

A TAC (Technical Advisory Council) may be established to take an in-depth look at a competitive event. The TAC consists of:

- j TAC Chairman
- j 3-9 Members with expertise (from at least 3 different states)
- j CE Co-Director
- j National HQ Liaison

### Recommended TAC Timeline

|                        |   |
|------------------------|---|
| <i>June - November</i> | Need for TAC evidenced through input from HOSA members or the health care community.  |
| <i>December</i>        | Motion request for TAC sent to CE Director.   |
| <i>January</i>         | CE Committee approves formation of TAC.   |
| <i>February - May</i>  | TAC meets through conference call, Internet, and/or US mail. Final recommendations developed and duplicated for CE meeting in June. Motion request and copies of all TAC minutes sent to CE Director. |
| <i>June</i>            | Action taken on TAC recommendations at CE meeting.  |

## Inquiry Process

*The Competitive Event Inquiry Process is designed to serve a purpose IF other efforts to resolve questions and conflicts have been exhausted.*

Ideally, if there are concerns raised before an event begins, those concerns should be addressed and resolved prior to the event starting if at all possible. CE Program staff and HOSA Management are always available to resolve conflicts.

During the event:

- ◆ Event Managers are strongly encouraged to take the time to discuss potential areas of conflict with the Lieutenant and/or Category Chair.
- ◆ Make certain that good decisions are being made throughout the event.
- ◆ It is better to stop and evaluate a situation as it is happening rather than try to correct an error after the event has been completed.

After the event:

- ◆ Use the written inquiry process.
- ◆ Inquiry forms are available in the CE event box or in CE Headquarters, and are generally filled out by a competitor with a concern and signed by the competitor's State Advisor.

The CE Program members are responsible for addressing the written inquiry, either that evening or following the NLC. Generally, the results of an inquiry review are discussed with the State Advisor, and a formal follow-up letter sent.

