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# **GUIDELINES FOR U.S. HEALTHCARE CONVENTIONS**





# HEALTHCARE CONVENTION & EXHIBITORS ASSOCIATION GUIDELINES FOR U.S. HEALTHCARE CONVENTIONS

## TABLE OF CONTENTS

GUIDELINES FOR ASSOCIATIONS .....	G-4
The Prospectus .....	G-4
Basic Information .....	G-4
Exhibition Specifics .....	G-4
Rules and Regulations .....	G-7
Enforcement of Rules and Regulations .....	G-8
Suggestions Concerning the Prospectus .....	G-8
Additional Comments .....	G-9
Exhibitor Relations and Exhibitors Advisory Council .....	G-9
GUIDELINES FOR TECHNICAL EXHIBITORS .....	G-9
GUIDELINES FOR SCIENTIFIC EXHIBITORS .....	G-10
Index .....	G-11

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HCEA's Guidelines for U.S. Healthcare Conventions are designed to assist healthcare association personnel planning exhibitions, and companies exhibiting at these meetings. The Guidelines are continually reviewed and updated by the HCEA Guidelines Committee; any changes are approved by HCEA's Board of Directors. By suggesting information for inclusion in a prospectus, the Guidelines enable associations to more effectively market their exhibitions to potential industry participants. Orders for additional copies or comments on these Guidelines should be directed to HCEA, Guidelines Committee, 5775 Peachtree-Dunwoody Road, Building G, Suite 500, Atlanta, Georgia, 30342 USA. Phone: (404) 252-3663, Fax: (404) 252-0774. E-mail: [hcea@kellencompany.com](mailto:hcea@kellencompany.com). Web Site: <http://www.hcea.org>. This revision completed May 2006.



# HEALTHCARE CONVENTION & EXHIBITORS ASSOCIATION

## Guidelines for U.S. Healthcare Conventions

These guidelines are written for two audiences, the association/meeting manager and the exhibitor. Since two types of "exhibitors" exist (Scientific and Technical), guidelines directed toward each type also are listed. The following information is an accumulation of facts, developed and routinely updated over the past 60 years. The Guidelines and Rules & Regulations below are suggestions we strongly recommend for adoption by healthcare associations and for inclusion in the prospectus. New Information is indicated in bold following the heading **NEW** and the date of addition. For ease of use, we have divided this document into the following sections:

- I. Guidelines for Associations
  - The Prospectus
  - Rules & Regulations
  - Enforcement of Rules & Regulations
  - Suggestions Concerning the Prospectus
  - Additional Comments
  - Exhibitor Relations and Exhibitors Advisory Council
- II. Guidelines for Technical Exhibitors
  - Hazardous Waste
- III. Guidelines for Scientific Exhibitors

### 1. GUIDELINES FOR ASSOCIATIONS

#### THE PROSPECTUS

##### Basic Information

The exhibit prospectus is usually the first marketing piece received by companies from associations. It should contain all of the information necessary for a company to determine their participation as an exhibitor. The more complete the prospectus, the more informative and useful it becomes to all concerned. The Guidelines indicated below are suggestions we strongly recommend for inclusion in a prospectus. Since the prospectus is an accumulation of information on a specific meeting, including facts and figures on the previous meeting(s), the following information should be provided:

**Name and address of the Association** (and meeting name, if different).

**Name and Exact Titles of Key Personnel** involved with the convention program, their mailing addresses, telephone and FAX numbers and e-mail addresses where applicable.

**Dates of the Convention** and in big, bold type, the exhibit dates.

**Exhibit Facility and Location** (city, state).

**Background information on convention**, including: list of previous exhibitors; how long convention has been held; and locations of previous and future meetings.

**Background information on facility**, including photographs or diagram.

**Attendee demographics and information** from the most recent previous convention, including: attendance figures, medical specialty, buying or prescribing influence, age, and any other available attendee data pertinent to exhibitors' decisions about participation in the exhibition (e.g., average number of hours an attendee spends in exhibit hall, years in practice and number of booths visited). Copies of the previous year's program should be available from the convention manager on request.

**Official travel agency** (if applicable).

**Official carrier** airline or other transportation (if applicable).

**Transportation information** (including prices) unless shuttle bus service is provided.

**Shuttle Bus Service.** When shuttle service will be provided to the convention center from hotels, complete information about the service, such as the names of the hotels served and the dates and hours the buses will be operating, should be given. If this information is not available in its entirety when the prospectus is printed, indication of where and when it will be provided should be given.

**Credit cards accepted.**

**Rental car agencies.**

**Parking.**

**Deadline for abstracts.**

**Date that final program will be available.**

**Objectives of the Meeting.**

**Additional Marketing Opportunities Available to Exhibitors.** (e.g., newspaper, ad space in journal or exhibit guide, mailing lists, sponsorship items, hyperlink to association Web site.)

#### EXHIBITION SPECIFICS

**Exhibit Hours** should appear in the exhibit information section as well as in the floor plan in a format designed to stand out. The times set aside for registrants to visit the exhibits should be clearly specified.

**Set-up and Dismantling Dates and Hours.**

**Exhibit Installation.** The day and hour when installation of exhibits may begin, and the times allotted for installation should be stated. The time at which installation must be completed also should be indicated.

**Dismantling of Exhibits.** The day and hour when dismantling of exhibits may begin, times allotted for dismantling and when exhibit removal must be completed should be stated.

The association should schedule at least 50% of the available installation and dismantling hours at straight time rates if at all possible.

**Registration Hours.** Exhibitor registration should be open on the first day of set-up so that Exhibitor personnel arriving early to set up can obtain their badges and be admitted into the hall. This should be clearly noted by listing Exhibitor Registration times separately in the prospectus.

**Space Assignment.** Space assignment methods should be well defined. Use of a priority point system is recommended, and an explanation of the system in the prospectus should be provided. The priority point system should include points awarded for each year that a company has exhibited with the association. At the association's discretion, additional points could be awarded for the amount of booth space contracted, within limits (additional points should not exceed three times the number of points that can be earned with a single 10 ft. x 10 ft. space for each year). This allows newer and smaller exhibitors to accumulate points in an equitable manner. Also, when the point system is used, some floor space may be made available to new exhibitors, if contracted space allows, to accommodate new exhibitors. When a point system is used, only exhibit activities should be considered; sponsorships, advertising space in the association's journal, housing or any other non-exhibit-related activity should not be considered. The 'first come, first served' system is also considered unsatisfactory, although a reasonable date for receipt of space applications may be set by the convention manager; assignment on a 'first come, first served' basis is acceptable after this date.

**Mergers & Buyouts.** In the case of exhibiting companies that have either merged with, been purchased by or have purchased another company and merge their booth space, the new company should receive the points earned by the company that had the higher point total, if requested in writing by the merged company. The priority points should not be combined.

**NEW (1/2004)** companies that may have entered into joint ventures or co-marketing agreements, and that wish to exhibit in a manner best describing their joint agreement.

Definition—The definition of a joint venture/co-marketing agreement is that in which two or more companies are developing, manufacturing, producing, or distributing the same product.

Companies having such a business agreement may choose to:

1. Be aligned on the exhibit floor adjacent to each other in order to jointly promote the specific product, or;

2. Be represented by only one of the companies in the agreement utilizing exhibit space, but displaying through signage that the product is a joint venture/co-marketed product.
3. Exhibit in one booth under the joint venture name with one exhibit manager contact coordinating all joint venture booth staff and activities (housing, badges, show guide listings, etc., which are subject to association policies).

If the companies having the agreement wish to have their space located adjacent to each other, both companies should submit in writing, with their applications, a cover letter initiating the request. A copy of the letter should also go to each of the companies in the agreement.

Space allocation should be based on the present points average of the companies in the agreement.

If only one company is exhibiting the co-marketed product, the association should deal only with that exhibiting company. Subletting of space for the purpose of allowing another company to exhibit within the principal exhibit should not be permitted. If the non-exhibiting company needs housing or registration badges, they should work directly with the association and according to the association's policies.

Associations should make every effort to be inclusive of all joint marketing partners. If possible and upon request, the names of both joint partners should be included in separate listings in the Exhibit Guide. The association may charge an administrative fee for the additional listing. If two listings cannot be provided, the exhibiting company should list the non-exhibiting partner within its listing.

**Listing Merged Companies.** The Exhibit Guide (e.g., Convention Program) is the primary tool attendees use to find exhibitors. HCEA's Guidelines recommend that, upon request healthcare associations make available for a period of one year a second listing for companies that merge. For example, if Company A and Company B both exhibited at an association's meeting in the past, and if Company A merges with or is acquired by Company B and they take one booth space as Company B, the listing should be:

Company A: 'See Company B, Booth No. \_\_\_\_'.

Company B: The listing should be the typical full listing of products and services.

If the association incurs additional costs to provide the second listing, it is acceptable that the association charge a nominal fee to provide the second listing.

**Booth Relocation.** Booth relocation, after exhibitor acceptance of assigned space, is a very serious matter which can often be avoided with good advance planning. When relocation is totally unavoidable, quick and complete communications with the exhibitor should be carried out. The reason for the relocation should be explained. In any and all instances of booth relocation, the affected exhibitors should be given the option to cancel and receive a full refund of all payments made in the event the reassigned space is not acceptable to the exhibitor.

**Booth Fee.** A list of what is included in the booth fee (e.g., shuttle, access to general sessions, aisle cleaning, booth ID sign, programs) should be included in the prospectus.

**Booth Payments.** Associations may require a deposit to be submitted with the application of up to 25% of the cost of the requested space. Deposit retention should be contingent upon acceptance of space assignment, and returned if withdrawal is chosen at that time. Balances due for space may be required no more than 120 days prior to the convention opening.

#### Space Cancellation.

1. If an exhibitor cancels space more than 120 days prior to opening, only the 25% deposit should be retained.
2. If an exhibitor cancels space less than 120 days prior to opening and the space is not resold or the exhibition is not sold out, 100% of the cost may be retained.
3. In the event the canceled spaces are resold and the entire exhibition is sold out, the convention manager may retain a reasonable administrative fee up to 25% of the canceled exhibitor's booth cost; the balance of deposits/payments should be refunded.

**Convention Curtailment.** In the event that the convention is curtailed for any reason, exhibitors should be entitled to a refund of payments made, proportionate to the curtailment (e.g., curtailment of a four-day

convention by one day should result in a 25% refund to exhibitors).

**Booth Description.** The size of the standard booth, availability of other types (e.g., island or peninsula) and furnishings which will be provided should be indicated. The color of the backwall and side draping to be used should be indicated.

**Carpeting.** If the exhibit hall is carpeted, this should be stated along with the color of the carpet. If the aisles of the exhibit hall will be carpeted, the color of the carpet will be important to the exhibitor.

**Exhibitor Lounge.** If an exhibitor lounge is provided, the location should be given.

**Housing.** The housing process used should be explained in the prospectus, including the system used to allocate rooms.

**Hotels.** HCEA's Convention Housing Position Statement and Convention Housing Backgrounder address many of the concerns about housing. Visit the HCEA Web site at [www.hcea.org](http://www.hcea.org) for details.

Associations should provide the exhibit manager with detailed housing information. If known at the time the exhibit prospectus is printed, the names and addresses for the headquarters hotels should be stated. Either in the prospectus, or with the original booth confirmation, associations should provide:

- The names and addresses of all hotels where room blocks exist
- The policy on reservations (e.g., made directly with the hotel or through a housing bureau)
- Any information (or restrictions) which will expedite the room reservation procedure.

Additionally, room blocks for exhibitors should be made in each hotel on a percentage basis equal to the ratio of the exhibitors to the registrants. If possible, the exhibiting company's guarantee for room block requests should be accepted without a deposit requirement. If a deposit is required, it should not exceed the deposit required of the healthcare professional attendees. Rooms should be held in the company's name; the company exhibit manager (or their designate) should provide a final rooming list to the hotel reservations manager approximately 4 weeks in advance of the meeting.

**Floor Plan.** This is probably the most important segment of the prospectus for the exhibit manager. The floor plan should be accurate and to scale, using 10 ft. x 10 ft. (3m. x 3m.) for the standard booth floor space where possible. Floor plan information should include:

- Description of normal booth space
- Price of each space
- Free form/island space (availability plus cross reference to booth specifications and restrictions)
- Entrances and exits
- Post and column locations and sizes
- Scientific exhibit areas
- Meeting rooms (if known)
- Registration area (if known)
- Ceiling height
- Obstructions such as balconies, air ducts, pipes, light fixtures, and elevators (location, dimensions, and capacities)
- Aisle width
- Utilities available in spaces (water, gas, phone and compressed air)
- Electrical hook-up-ceiling or floor
- Floor load restrictions
- Elevator and stair locations
- Loading area
- Convention service desk
- Dining area
- Storage area (if available)
- Restrooms
- Exhibitor lounge

It is essential that footnotes identify any symbols used to indicate columns or other booth obstructions. Any restrictions, such as locations near elevators or loading docks where set-up and dismantling hours are reduced, should be identified.

Any floor plan changes should be conveyed to exhibitors at least 60 days in advance of the convention or immediately if they are known.

**Exhibit Services.** To enable exhibitors to make financial decisions before submitting space applications, rates for drayage, labor and all official contractor services should be quoted in the prospectus.

The policy/guidelines for the use of independent installation and dismantle

labor should also be stated in the prospectus. Competitive bidding should be used in the selection of single source service suppliers, and services used by the association should be funded from revenues from the sale of space instead of from "hidden" markups on exhibitor services. Exclusive contracts for installation and dismantling services are strongly opposed by HCEA, and should be avoided. A 30-day advance notice of intent to use an independent installation and dismantling contractor is a reasonable requirement for exhibitors who wish to do so. An independent contractor must provide a certificate of insurance to the association.

It is recommended that exhibitors and contractors work together to establish exhibitor credit and avoid the need for prepayment and on-site payment requirements for services. Prepayment and on-site payments, prompted by increases in late payments and bad debt, actually induce exhibitors to use independent contractors to escape what is often a "surprise" hardship, requiring a "special case" processing of billing. In addition, the association has an obligation to its official contractors to assist in the collection of bad debt. A statement that loss of future priority points will result from nonpayment of previous show service charges will help clear many late payments.

As the designator of official contractors, the convention manager is automatically a party to disputes between those suppliers and exhibitors. Mediation by the convention management should be an obligation whenever exhibitors are denied alternative source options for logistical reasons, e.g., drayage.

The official service contractors' names, complete addresses, phone numbers and the names of the individuals who will handle the convention should be included in the prospectus, along with the expected mailing date of the exhibitor service kits. The service kits should reach the exhibitor 60-90 days prior to the meeting.

**Exhibitors Service Kit.** Convention management should provide the exhibitors with a kit giving complete information on available services, e.g., outside contractors and/or official contractor. The kit should also contain all necessary forms required for contractual services such as drayage, labor, electrical power, booth furnishings, telephone and conference guide aids.

#### **Exhibit Booth Specifications.**

##### **1. Booth Sizes.**

###### **A. Standard In-Line Booth**

"In-line" booths generally are a row of standard booths exposed to an aisle on one side. Except for small meetings with primarily tabletop exhibits, a standard booth should be 10 ft. wide x 10 ft. deep x 8 ft. high. In some cases in-line booths up to 12 feet in height may be ruled acceptable if confined to perimeter walls (these are sometimes called perimeter booths). The booth height may be maintained up to 50% of the distance from the backwall toward the front of the space. To allow for clear sight lines from attendees in the aisle to neighboring exhibits, no obstructions in the front half of the booth above a height of 48 in. should be permitted. Some standard in-line booths are considered corner booths. Corner booths are standard in-line booths that are exposed to an aisle on two sides. When three or more in-line booths are used as one exhibit, only those portions within 10 ft. of an adjoining exhibit must conform to the 48" height rule.

###### **B. Peninsula Booth**

Essentially an island exhibit (four or more 10 ft. x 10 ft. spaces) attached to the end of a row of in-line booths, the peninsula should not cause a visual disadvantage to adjacent exhibits that is greater than would be caused by an in-line booth in the immediately adjacent space. When a peninsula booth backs up to in-line booths, in-line booth restrictions apply within 10 ft. of neighboring booths (e.g., 48" height restriction within five feet of each aisle, 8 ft. backwall height restriction); island specifications/restrictions apply for the remaining portion of the peninsula booth. When a peninsula booth backs up to another peninsula booth (known as a split island booth), the backwall may be 8 ft. across its full length, and island specifications/restrictions again apply for the remaining space.

Since island exhibits are frequently used in peninsular space and are not designed to the same height requirements as in-line exhibits, the likelihood of violation is significant. Therefore, convention management should take special care in reviewing and approving sketches of peninsula exhibits in advance.

Two back-to-back 10 ft. x 10 ft. spaces at the end of a row of in-line booths is sometimes called an end-cap booth. In-line booth restrictions apply five feet in from the side aisles, and 10 feet in from the aisle which the booth faces.

###### **C. Island Booth.**

Typically four or more booth spaces completely surrounded with aisles, the island is the most prominent feature of the large size exhibition. The island represents an effort by the exhibitor to elevate its impact in the exhibit hall. Maximum height for an island exhibit should be limited only by the ceiling height of the hall, but many meetings have maximums that have been settled upon by their Exhibitors Advisory Council. HCEA supports this process. The issue of adequate see-through is frequently a source of misunderstanding when island exhibits are used. The underlying principle that should be used to maintain fairness should be that the visual disadvantage created by a neighboring island should be no greater than that which would be caused by an in-line. With this proviso, exhibitors should be allowed full use of the floor space available up to the maximum height. Island blueprints and photographs should be reviewed and approved well in advance of the meeting to avoid unresolvable problems during the exhibition itself.

Multi-story island exhibits often require approval from facility and/or governmental authorities, making review of blueprints well in advance essential. Additional fees assessed by convention management for the use of multiple story exhibits in island spaces is opposed by HCEA. The costs associated with the use of multiple story exhibits are substantial, and additional surcharges can only reduce their numbers.

- 2. Roofs.** Fire safety regulations may prohibit totally or partially the construction of roofs for booths. If so, the specifications for allowable roofs, if any, should be stated in the prospectus (e.g., no more than 50% of any booth and 25% of the exhibit hall may be covered). If roofs, canopies or false ceilings are allowed, they should conform to the spirit of the visual sight line considerations stated above. The canopy or roof itself should be no more than 1" thick, and supports for the roof or canopy should be no more than 3" wide.
- 3. Hanging Signs/Graphics.** Signs and/or graphics (e.g., in island booths) suspended from the ceiling of the facility, or supported from the floor, may be permitted. If so, they should conform to the appropriate restrictions for the type of booth in which they are used. The rules and restrictions regarding the use of hanging signs should be clearly spelled out in the prospectus. No signs or graphics should span the aisles.
- 4. Materials/Construction.** Any restrictions or regulations on materials (e.g., whether certain materials may be prohibited or require treating to meet fire safety codes) or procedures (e.g., use of adhesives) which may be used in booth construction, should be stated.
- 5. Damage to Building.** In general, it should be understood that exhibitors are to leave the convention center in the same condition they found it, and should not make or attempt alterations of any kind without express written permission.
- 6. Load Restrictions.** In general, walls, columns, and other structures of the convention center should not be subject to loads from an exhibit. However, if any floor of the facility has load restrictions, this should be clearly stated in the prospectus so that exhibitors may plan accordingly and prevent any inadvertent damage.
- 7. Safety Regulations.** All safety regulations should be stated clearly in the prospectus.
- 8. Water Supply.** The availability of water and drainage services, along with any specifications thereof, should be stated in the prospectus. It should also be made clear who will be responsible for installing these services.
- 9. Storage.** If storage space is available to exhibitors, this should be stated in the prospectus, along with any associated restrictions (e.g., prohibition against storing flammable items). If procedures regarding assignment of storage space are associated in any way with exhibit space assignment procedures, this should be made clear. In instances where storage is available, it is recommended that some minimum storage space be set aside for every exhibitor. If no storage space is available, this should be stated clearly in the prospectus. Exhibitors should be allowed to store a reasonable

supply (e.g., one-day's) of literature or product samples within the exhibit as long as it does not interfere with the safe and normal operations of the booth.

**Inappropriate Exhibits.** Space should not be assigned to any company whose products or services do not contribute directly to the meeting registrants' healthcare practice.

**Surveillance/Security.** The extent of responsibility and liability for each party regarding surveillance and security (association, convention center and exhibitor) should be stated clearly in the prospectus. If the convention center or association has arranged security, the extent of that security should be explained clearly. Regardless of security arrangements, it is always recommended that exhibitors take any valuable portable items out of their exhibits during off hours. If exhibitors desire additional security, procedures for arranging this should be made available to them.

**Cleaning.** If the association has arranged cleaning services for the exhibition hall, the extent of these should be outlined in the prospectus. If further cleaning services are required, procedures for arranging this should be made available to exhibitors by the association.

**Smoking.** Any prohibitions on smoking in the exhibition hall should be clearly stated in the prospectus.

**Exhibitors Advisory Council.** Members of the EAC should be listed in the prospectus.

**Open Forum.** An Exhibitors Open Forum is a meeting of association management with exhibitors, allowing any exhibitors who wish to attend to provide comments to management on their experience in the exhibit hall. An open forum also allows management and exhibitors to exchange views on issues important to the success of the exhibition. They can be an excellent mechanism for both parties to give and receive feedback that can lead to improvements in subsequent conventions, and are recommended by HCEA for this purpose. If an exhibitors open forum is held, this should be identified in the prospectus along with the date and time, so exhibitors can plan to attend. If there is not an open forum, association management should conduct an exhibitor survey to give exhibitors and opportunity to provide feedback on the meeting.

## RULES AND REGULATIONS

The prospectus should include a separate section which identifies convention management's rules and regulations as they pertain to the convention.

**ADA - Americans with Disabilities Act.** While meeting planners and facilities have improved provisions for the disabled, some exhibitor booths may not be accessible. A reminder to exhibitors regarding the ADA provisions relating to exhibit properties should be included.

**Admission of Guests.** The guest admission policy should state the number of complimentary guest registrations, any fee for additional registrations and the procedures for guest registration. It is recommended that guests, including distributors and representatives, provide identification, either to the exhibitor or to the association, in order to receive their badges. Admission of guests should be regulated by badges. Proper application should be required from an exhibitor who invites a number of his distributors or representatives to visit the display area.

**Attire of Models.** Attire of models and demonstrators on the exhibit floor can significantly impact a meeting. Attire should be consistent with the professional atmosphere of the convention.

**A-V Equipment.** If closed sound systems cannot be arranged and/or open sound systems are permitted, restrictions or regulations should indicate that the sound should not interfere with any other exhibitor. Convention management should require compliance and reserve the right to take necessary corrective action.

**CME Accreditation.** Some associations allow exhibitors to conduct CME accredited courses on the exhibit floor. If the association has a policy on this issue, it should be stated in the prospectus.

**Containers and Giveaways.** Unless otherwise stated in the prospectus, such items as containers (bags) and giveaways should be allowed if approved for distribution through the convention manager. If such items are not permitted, this should be clearly stated in the prospectus.

**The Convention/Scientific Program.** If possible, a preliminary/ad-

vance copy of the program should be sent to exhibitors 6 months or more in advance of the meeting, preferably with the prospectus. At a minimum, the prospectus should include a schedule of the meeting program including permissible hours for exhibitor events. If the program is published on the Internet, exhibitors should be provided with the appropriate Web address, and they should have full access to the site. Even preliminary information is useful. Knowing the guest speakers or lecture topics could help exhibitors and others in their company determine the feasibility of their participation in the meeting.

The final program or exhibit guide should include a floor plan of the exhibit area, a listing of exhibitors by firm name and space number and an exhibitor-provided description of each exhibit. A minimum of one complimentary copy of the program per 10 ft. x 10 ft. of exhibit space should be available to the exhibitor.

**Display of Investigational Products** To remain within the expectations and limitations of the Food and Drug Administration's Guidelines on Notices of Availability, any investigational product that is graphically depicted on a commercial exhibit should:

1. Contain only objective statements about the product.
2. Contain no claims of safety, effectiveness or reliability.
3. Contain no comparative claims to other marketed products.
4. Exist solely for the purpose of obtaining investigators.
5. Be accompanied by directions for becoming an investigator and a list of investigator responsibilities.
6. Contain a statement: "Caution - Investigational Device - Limited to Investigational Use" (or similar statement) in prominent size and placement.

**Distributor Badges.** A registration policy specific to "distributors" may be necessary for your meeting. Distributors may be registered with any exhibiting company or several exhibiting companies. Business cards inserted over the "official" badge should not be allowed. Distributors should be prohibited from selling to exhibitors on the exhibit floor.

**Exhibitor Demonstrations.** Demonstrations by exhibitors should contribute to the needs of the attendees in a professional way. Demonstrations and adequate space for an audience should be available within the confines of the individual exhibitor's booth. No interference with normal traffic flow and infringement on neighboring exhibits should be permitted.

**Exhibit Staff Conduct.** Exhibitors should ensure that their exhibits are properly staffed at all times. Those leaving booths unstaffed for long periods of time, or those who vacate the booth prior to the official closing time, may be excluded from future meetings or penalized in some other way (e.g., a violations system). Offensive promotions by exhibit personnel should not be tolerated. HCEA offers the brochure "Conventional Wisdom," which describes standard good exhibiting practices.

**FDA - Food and Drug Administration.** The FDA imposes rules and regulations on some of the products exhibited at healthcare meetings. The prospectus should advise exhibitors of the foregoing and note that further information may be obtained from FDA.

**Food and Beverage.** Any policies regarding distribution of foods and beverages in the booths should be included in the prospectus.

**Grants and Donations.** If conventions are to qualify as institutions of postgraduate education, professional registrants should be able to form opinions without being pressured. They should not be influenced by individuals or firms with an undisclosed financial interest in any presentation of the program.

Although HCEA realizes some firms do make financial contributions, HCEA has gone on record stating that it is improper for commercial manufacturers to finance healthcare meetings, either singly or in combination with other firms, for the purpose of influencing the choice of subject matter or speakers presented. Likewise, it is improper for professional groups to solicit donations for this purpose. The Accreditation Council on Continuing Medical Education (ACCME) has guidelines governing this matter, copies of which may be attained from ACCME's Web site.

**International Meetings.** Because international meetings present so many unique considerations for healthcare exhibitors and congress organizers, HCEA has developed a separate set of Guidelines covering congresses outside the United States. (Please see HCEA's *Guidelines for International Healthcare Exhibitions and Congresses*, beginning on page I-1.)

**Industry-Sponsored Events and Educational Symposia.** The prohibition of industry-sponsored events during official programs is an accepted and well-established practice within the industry. However, associations should permit exhibitors to utilize the shoulder days surrounding the program for their own smaller events, thus allowing companies to maximize the significant investment they make when exhibiting at a meeting. Associations may partner with their exhibitors by providing pre- and post-convention opportunities to enhance the exhibitors' participation. If an exhibitor event is conducted without the association's approval, they should not be expected to provide promotional assistance for these events, such as renting out the pre-registrant mail list. Sanctions should not be taken against an exhibitor for promotional activities occurring before the official opening or after the official adjournment.

Exhibitors who host hospitality suites should arrange their schedules so they will not conflict with the association's scientific program or major social events. The sponsoring association should not condone non-exhibiting firms having hospitality functions.

Additionally, exhibitors may wish to take into consideration the guidelines set forth in the Pharmaceutical Research and Manufacturers of America (PhRMA) "Code on Interactions with Healthcare Professionals," the Advanced Medical Technology Association's (AdvaMed's) "Code of Ethics for Interactions with Health Care Professionals" and the Office of Inspector General's (OIG's) "Compliance Program Guidance for Pharmaceutical Manufacturers" when planning hospitality programs. Each of these documents provides guidance on industry sponsored events and meeting support.

**Liability Insurance.** Under no circumstances should an exhibitor be responsible for any damage not caused by the exhibitor or the exhibitor's agent. Either the letter or the spirit of the following language is suggested for the balanced best interests of all concerned parties in the treatment of liability/insurance:

"Each party involved in the exhibit-exhibit hall owner, leasing association (sponsor) and exhibitor-agrees to be responsible for any claims arising out of its own negligence or that of its employees or agents.

"Each party agrees to be responsible for its own property through insurance of self-insurance and shall hold harmless each of the other parties for any and all damage caused by theft and those perils normally covered by a fire and extended coverage policy."

**Market Research Booths.** These exhibitors often give away incentives to get attendees to participate in market research. However, their giveaways can create an unprofessional atmosphere and backlogs in the aisle and/or blocking of neighboring booths. The convention manager should be responsible for seeing that booth personnel and professional attendees participating in a survey are within the confines of the exhibit space assigned.

**Music Licensing.** Exhibitors frequently use music in their exhibits. The position of the sponsoring organization on music licensing (in particular whether the sponsoring organization has paid the appropriate music licensing fees for the exhibition) should be stated in the prospectus.

**Press Conferencing.** The association's position on press conferencing, as well as its position on press on the exhibit floor should be clearly identified.

**Prizes and Lotteries.** Generally, prizes and lotteries offered by exhibitors are considered to be unprofessional, and in some cases may even risk violating federal regulations governing healthcare marketing. If prizes and lotteries are offered by associations, they should be of a professional nature. The prospectus should be clear on what is and is not allowed with regard to prizes and lotteries.

**Program Advertising.** On the whole, program advertising solicitation may help a sponsoring organization more successfully meet its financial commitments in setting up a quality convention program. However, it is recommended that such solicitations be restricted to participating exhibitors.

**Registration.** Whenever possible, attendee registration desks should be located outside the exhibit area, but near the main entrance to the exhibits. The registration area should be clearly marked on the floor plan

so that the prospective exhibitor may make an accurate analysis of traffic flow and routes to meetings. Badges should be supplied to all registrants and no one should be permitted access to the exhibit area without one. Badges should clearly identify and distinguish (preferably by badge color) association members, professional and lay guests, and students - by name, city and state. Badges for government employees (federal, state and local) also should indicate the individual's department or agency affiliation. At hospital meetings, hospital affiliation should be placed on the badge so all persons may be identified and qualified quickly. Exhibitors should be identified by the individual's name and company affiliation.

Color or number coding of badges offers a simple means of ready identification. Where appropriate, the registrant's specialty should be indicated to permit the exhibitor to give a presentation of his/her products that is relevant to the registrant's practice.

[Some associations schedule one or more half days during their annual meetings when admission to exhibits and general sessions is limited to professional registrants only.] While this practice reduces the total number of persons, most HCEA members feel that closed sessions offer an opportunity for more effective contact. They also offer professional registrants more direct and efficient access to information.

Exhibitors should be preregistered. As a courtesy, there should be registration, at no cost, for a limited number of company professionals per booth per exhibit day. If exhibitor registration is to be limited, arrangements should be made for badge exchange.

Convention management should take every precaution to exclude the general public from the exhibit area. An influx of nonprofessional visitors makes it difficult for exhibit representatives to develop effective contacts.

**Scientific Exhibits.** See the separate section, "Guidelines for Scientific Exhibitors."

**Selling in Exhibit Space.** Most healthcare exhibits and displays are intended primarily for the purpose of imparting information about new products or technology, or to present a continuing education program. However, there are some exhibitors who do, in fact, solicit orders and/or make sales at their booths. The prohibition or acceptance of such activity at a given meeting should be decided upon by the sponsoring organization, and the policy of the association regarding this matter should be clearly stated in the prospectus.

**Photography.** Photographs of the exhibits should not be allowed, except by or with the permission of the relevant exhibitor. However, association management may reserve the right to photograph exhibits. If photography services for this purpose are available through the association, this should be stated in the prospectus.

**Electronic/Lead Retrieval Cards.** The use of electronic lead retrieval cards to determine which attendees visit a booth is encouraged since this facilitates lead tracking. The use of such cards and related relevant information (e.g., any exhibitor equipment or costs required) should be specified.

## ENFORCEMENT OF RULES AND REGULATIONS

Rules and regulations for exhibits that are adopted by associations in cooperation with their Exhibitors Advisory Councils are requirements that bring order and fairness to the medium. Without enforceability, however, they are of little value. Exhibitors who violate regulations that, in the judgment of the Exhibitors Advisory Council, are necessary to the equitable management of the exhibition should be deterred from doing so through contractually predefined sanctions.

Typical violation sanctions are:

1st violation	Loss of current year priority points.
2nd violation	Loss of one-half accrued points.
3rd violation	Loss of remainder of points.
4th violation	One year suspension of exhibit privilege.

These examples are merely guidelines that should not be exceeded. Final decision should rest with the Association after consultation with the Exhibitors Advisory Council. Full disclosure of these sanctions should be referenced in the Rules and Regulations and included with confirmation of space assignment to ensure awareness and compliance. Any rule, regulation or violation sanction must be in conformity with existing law.

## SUGGESTIONS CONCERNING THE PROSPECTUS

The prospectus or a general announcement of place and date of the meeting should be mailed to prospective exhibitors at least 6 months prior to the date of the meeting.

An advance notice should be sent, giving the date on which exhibitors may expect to receive the prospectus. The ideal time is July or August of the year preceding the meeting, as this is the time when many exhibitors are planning and formulating the exhibit schedule and budget for the next year.

## ADDITIONAL COMMENTS

A duplicate copy of the standard instruction form, floor plan and space contracts should be mailed to all exhibitors prior to the date of the meeting. Service contractors should provide service order forms at least 90 days in advance of set-up dates.

A form for advance registration of exhibit representatives should be provided to avoid delay and confusion at the convention.

Housing forms should be sent in sufficient time for exhibit personnel to secure adequate accommodations. Room blocks should be accepted in the name of the company (with a guarantee instead of a deposit, if possible -- see "Hotels" section earlier in these Guidelines), with a final rooming list containing the names of room occupants being provided approximately 4 weeks in advance of the meeting. [See HCEA's Convention Housing Position Statement and Background for further information on housing.]

The association convention manager and the association's Board of Directors should use every vehicle available to them to remind their members that the revenue from exhibitors significantly reduces the cost of the program to the association and its members, and the educational contribution of the exhibits enhances the value of the convention.

An association's convention exhibits should benefit all participants: professional attendees, sponsoring association, and exhibitors. As an association determines charges in conjunction with its exhibit program, it is important to ensure that equitable value is maintained for all concerned. Charges or cost increases that impact inequitably on the exhibit activity, without a corresponding increase in value, can have long-term negative results for the healthcare association and attendee, as well as the exhibitor.

## EXHIBITOR RELATIONS AND EXHIBITORS ADVISORY COUNCIL

It is the responsibility of any association that relies on technical exhibits to support its annual meeting, to maintain an open communication channel with its exhibitors. The desirable method is the Exhibitors Advisory Council, or EAC. About six knowledgeable exhibit managers should be selected on the basis of experience, fair representation of product categories, and interest. These exhibitor representatives should meet at least once a year with association management to discuss the exhibit portion of the annual meeting. Any association that wishes assistance in organizing an EAC should notify HCEA for a copy of the brochure "Exhibitors Advisory Council."

## II. GUIDELINES FOR TECHNICAL EXHIBITORS

Exhibitors can do many things themselves to foster communication and positive working relationships with their healthcare convention managers. HCEA has, therefore, assembled these Guidelines to suggest steps healthcare exhibitors can take to eliminate confusion and problems between exhibitors and convention managers. These Guidelines are suggestions that HCEA strongly recommends be followed by each exhibitor.

- Read the prospectus carefully, paying particular attention to potential problem areas, such as material handling requirements and rates, liability and prepayment clauses, installation and dismantling dates and times (standard time or double time rates), penalty enforcement or violation clauses, etc. Underscore or circle important items that will instantly draw your attention or that of the person in charge of the exhibit for your company.
- Reply promptly to all requests to exhibit that you receive in one of the following ways:

- acceptance of application as submitted;
  - conditional acceptance, pointing out terms that are not acceptable with corrective language that is acceptable;
  - letter of regret; or
  - letter of regret asking to be dropped from the mailing list if there is no reason for future consideration of attendance.
- Make space deposit payments promptly, and all payments before their deadlines. If these requests for payments conflict with HCEA's Guidelines for Associations included in these Guidelines for Healthcare Conventions, bring this to the attention of the association convention manager before the deadline, to resolve issues before deadlines pass.
  - Complete and mail service contractor order forms at least 4 weeks in advance of the meeting. Any telephone orders should be confirmed in writing. Any service or rental cancellations should also be confirmed in writing.
  - Allow adequate delivery time for the exhibit to reach its destination. Note the specified dates, address and deadline the drayage company is to receive shipments prior to set-up day. Note the shipping address to be used before and after the deadline date. If the prospectus fails to provide this information, contact the association manager to obtain it.

Advise the person in charge for your company that it is his/her responsibility to monitor the movement of the exhibit via tracking numbers, air bills, etc.

Provide your booth personnel with a copy of the rules and regulations applying to exhibitors as provided by the sponsoring association and emphasize the importance of adhering to them. Alert your personnel to the fact that if these rules and regulations are violated, your company may be penalized or denied the opportunity to exhibit at future conventions.

Provide your booth personnel with the HCEA booth behavior booklet "Conventional Wisdom" or equivalent, and ask them to please follow the dos and don'ts.

If you do not use professional installation/dismantling supervisors familiar with your exhibit, be certain that your company's representative, who is the assigned supervisor understands the convention hall regulations and local unions' division of responsibilities.

Advise your supervisor not to criticize or engage in arguments with labor personnel. Your supervisor should discuss the problem with the convention manager in the office set aside for convention management in the hotel or convention center where the exhibits are held. The association convention manager should then discuss the problem with the labor supervisor if necessary.

Report to the association convention manager any requests from personnel, in areas such as drayage and set-up, for payments (tips) for services performed.

If you plan to set up a small exhibit by yourself without union labor, you should check in advance to see if this is permitted. If the prospectus indicates you may do your own set-up and dismantling but you are stopped by union personnel, do not argue; contact the association convention manager.

- Arrange for products or equipment to be locked up or consider hiring a security guard to protect valuable materials.
- Unpack literature and other materials well in advance of opening of the exhibit hall so the aisles can be cleared of debris before meeting registrants enter.
- Advise your booth personnel to arrive early, obtain their badges and be in the exhibit booth before the exhibits open.
- Be certain a company representative or agent supervises the packing of product, equipment and dismantling of the exhibit at the conclusion of the meeting. Supervision of valuables should continue until the material is transported from the exhibit hall docks.

Exhibitors are advised to discuss directly with the association convention management any issues or problems they have, especially any that are relayed to them by their contractors/agents. The direct relationship between the exhibitor and association management is extremely important in making sure all issues are fairly portrayed and resolved.

Often at healthcare conventions multiple staff from the same exhibiting company plan activities that the exhibit manager knows nothing about, leading to confusion. Exhibit managers should maintain an overview of all corporate activities at a healthcare convention to ensure that the staff complies with all rules.

## HAZARDOUS WASTE

Hazardous medical waste is described by the U.S. Environmental Protection Agency as any waste that is generated in the diagnosis, treatment or immunization of human beings or animals, in research pertaining thereto, or in the production or testing of biologicals. Exhibitors who generate materials fitting any of these criteria in the course of their meeting activities should:

- Be aware of the full scope of the hazard(s) associated with their waste(s).
- Conform to the requirements of all regulatory agencies and/or governmental authorities (e.g., states) having jurisdiction in the convention location of the creation of hazardous waste.
- Ensure that all personnel who could possibly be engaged in the transportation, containerization, use, coordination, or disposal are fully informed of associated risks.
- Inform Association and Facility Management Staffs of the presence and planned disposition of hazardous waste at the time of space application to allow for thorough planning and preparation.

Associations should advise exhibitors in advance of any charges and procedures applicable to hazardous wastes.

### III. GUIDELINES FOR SCIENTIFIC EXHIBITORS

The following Guidelines for scientific exhibitors are suggested for those companies who assist physicians or other researchers in the construction of a scientific exhibit. These Guidelines conform to the requirements generally set forth by healthcare and other professional societies.

1. The author(s) of the exhibit should be responsible for the content of all data in the exhibit.
2. The content of the exhibit should not be promotional. This limitation should be given special attention if the exhibit deals with a pharmaceutical product, medical device or any product that is sold on the open market.
3. The scientific exhibit should be staffed by its author and/or those associated with the author in the formulation of the content of the exhibit.
4. Samples, trade packages, products or company promotional literature should not be displayed at the exhibit.
5. Scientific exhibit booklets and reprints should not include a product package insert, nor should they bear a company logo or address.
6. In general, company employees working at the company's technical exhibit at a meeting should not initiate conversation or make references to any scientific exhibit that is being supported by the company at that meeting.
7. Only generic names of drugs and other products should be used in the title or body of the exhibit. The first appearance of the generic name should be marked by an asterisk, with the brand name as a footnote at the bottom of the exhibit in letters not exceeding one-half inch in height. Company logos should not be used in any part of the exhibit.
8. HCEA has published a pamphlet on this subject, "Guidelines for Application, Production and Presentation of a Scientific Exhibit or Poster Display," which may be obtained from HCEA Headquarters.

## INDEX - GUIDELINES FOR U.S. HEALTHCARE CONVENTIONS

<b>—A—</b>			
Abstracts .....	G-4	In-Line Booth .....	G-6
Additional Marketing Opportunities .....	G-4	Installation And Dismantling .....	G-4, G-6, G-9
Airline .....	G-4	Insurance .....	G-6, G-8
Americans With Disabilities Act .....	G-7	International Meetings .....	G-7
AIP Alert Newsletter .....	G-9	Investigational Products .....	G-7
A-V Equipment .....	G-7	Island Booth .....	G-6
<b>—B—</b>		<b>—L—</b>	
Badges .....	G-8	Liability .....	G-7, G-8, G-9
Distributor .....	G-7	Load Restrictions .....	G-6
Booth Description .....	G-5, G-7	<b>—M—</b>	
Booth Fee .....	G-5	Market Research Booths .....	G-8
Booth Materials .....	G-6	Mergers & Buyouts .....	G-4
Booth Specifications .....	G-6	Listing Merged Companies .....	G-5
<b>—C—</b>		Models .....	G-7
Carpeting .....	G-5	Multiple Story Exhibits .....	G-6
Cleaning .....	G-7	Music Licensing .....	G-8
CME Accreditation .....	G-7	<b>—N—</b>	
Conduct, Exhibitor .....	G-7	New Exhibitors .....	G-4
Convention Curtailment .....	G-5	<b>—O—</b>	
Conventional Wisdom Brochure .....	G-9	Objectives of the Meeting .....	G-4
Credit Cards .....	G-4	Official Contractors .....	G-6
<b>—D—</b>		On-site Payment .....	G-6
Damage to Building .....	G-6	Open Forum .....	G-7
Demographics		<b>—P—</b>	
Attendee .....	G-4	Parking .....	G-4
Dismantling .....	G-4	Payments, Booth .....	G-5
Drayage .....	G-5, G-6, G-9	Peninsula Booth .....	G-6
<b>—E—</b>		Photography .....	G-8
Electronic/"Smart" Cards .....	G-8	Press Conferencing .....	G-8
Exhibit Hours .....	G-4	Prizes And Lotteries .....	G-8
Exhibit Services .....	G-5	Program .....	G-4, G-7
Exhibition		Advertising .....	G-8
Charges .....	G-9	Prospectus .....	G-8, G-9
General Public .....	G-8	Basic Information .....	G-4
Guests .....	G-7	Public transportation .....	G-4
Revenue .....	G-9	<b>—R—</b>	
Exhibitor Credit .....	G-6	Registration .....	G-4, G-8
Exhibitor Demonstrations .....	G-7	Relocation .....	G-5
Exhibitor Lounge .....	G-5	Rental Car Agencies .....	G-4
Exhibitor Service Kits .....	G-6	Requests To Exhibit .....	G-9
Exhibitors Advisory Council .....	G-6, G-7, G-8, G-9	Roofs .....	G-6
<b>—F—</b>		Room Blocks (See Hotels) .....	G-5, G-9
Floor Plan .....	G-5	Rules And Regulations .....	G-7, G-8
Food and Beverage .....	G-7	<b>—S—</b>	
Food And Drug Administration (FDA) .....	G-7	Safety Regulations .....	G-6
<b>—G—</b>		Sanctions .....	G-8
Giveaways .....	G-7	Scientific Exhibits .....	G-8, G-10
Grants And Donations .....	G-7	Security .....	G-7, G-9
<b>—H—</b>		See-through .....	G-6
Hazardous Waste .....	G-10	Selling In Exhibit Space .....	G-8
HCEA .....	G-6, G-7, G-8, G-9	Service Contractors .....	G-6, G-9
HCEA Directory .....	G-9	Shuttle Bus Service .....	G-4
Honoraria .....	G-8	Smoking .....	G-7
Hospital Meetings .....	G-8	Space Assignment .....	G-4
Hospitality Suites .....	G-7, G-8	Space Cancellation .....	G-5
Hotels .....	G-5	Space Deposit .....	G-9
Housing .....	G-5	Storage .....	G-6
Bureau .....	G-5	Symposia .....	G-8
<b>—J—</b>		<b>—T—</b>	
Joint Ventures .....	G-4, G-5	Technical Exhibitors .....	G-9
<b>—I—</b>		Travel Agency .....	G-4
Inappropriate Exhibits .....	G-7	<b>—U—</b>	
Independent Contractor .....	G-6	Union .....	G-9
Industry-Sponsored Events .....	G-8	<b>—W—</b>	
		Water Supply .....	G-6



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