



pharmacists advancing healthcare<sup>®</sup>

# Presenter Handbook

Leaders Conference 2017



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## TABLE OF CONTENTS

|  |    |
|--|----|
| Before You Begin .....                                     | 3  |
| Preparing Your Presentation .....                          | 3  |
| ACPE Compliance.....                                       | 3  |
| Active Learning & Learning Assessment.....                 | 3  |
| Matching Active Learning Strategies to Activity Type ..... | 3  |
| Assessment of Learning and Assessment Feedback.....        | 4  |
| Commercialism & Bias .....                                 | 4  |
| Financial Relationships .....                              | 4  |
| Preparing Self-Assessment Questions and Answers.....       | 5  |
| PowerPoint Slides .....                                    | 5  |
| Supplemental Educational Resources.....                    | 6  |
| Agreements and Documentation .....                         | 6  |
| Presenter Agreement .....                                  | 6  |
| W-9 .....  | 6  |
| Recording Agreement.....                                   | 7  |
| Copyright Agreement .....                                  | 7  |
| Biography and Photo .....                                  | 7  |
| Biography.....   | 7  |
| Photos/Headshots .....                                     | 7  |
| Hotel and Travel .....                                     | 8  |
| Budget and Compensation .....                              | 8  |
| Honoraria.....   | 8  |
| Complimentary Registration.....                            | 8  |
| At The Meeting .....                                       | 9  |
| When You Arrive.....                                       | 9  |
| Audiovisual Equipment.....                                 | 9  |
| Room Sets .....  | 9  |
| Delivering Your Presentation.....                          | 10 |
| Additional Resources .....                                 | 11 |
| Contact Us .....   | 11 |
| Appendix A: Active Learning Strategies.....                | 12 |
| Appendix B: PowerPoint and You .....                       | 13 |

**THANK YOU for agreeing to serve as a presenter!** Your participation is an important contribution to the profession and a great way to share your expertise with peers and colleagues.

This handbook provides important instructions on preparing materials related to your session. Also provided to you is a checklist to help keep you on track. If you have any questions, then contact the Educational Services Division at [EducServ@ashp.org](mailto:EducServ@ashp.org). We are here to help you in any way we can, but it is important that you adhere to the deadlines.

**ASHP WOULD LIKE TO STRESS SKILL DEVELOPMENT THROUGH SESSIONS FEATURING DYNAMIC, INTERACTIVE INSTRUCTIONAL STRATEGIES.** Many meeting attendees have come to expect and look forward to this in our educational programming. As a presenter, keep this in mind as you plan your presentation.

## BEFORE YOU BEGIN

- Ensure your learning objectives and content correspond with the direction provided by your ASHP staff representative.
- The key to an effective presentation is selecting material that meets the needs and level of the audience. This conference is geared towards pharmacy leaders and aspiring leaders.
- Rehearse your presentation carefully and do not speak longer than your allotted time.
- The best presentation provides your audience with state-of-the-art information; what attendees want most are practical insights, tips, and strategies to take home and apply in their practices.

## PREPARING YOUR PRESENTATION

### ACPE Compliance

ASHP promotes quality education programs that are free from commercialism and bias. **ALL CE PROGRAMS MUST INCLUDE AN ACTIVE LEARNING STRATEGY AND LEARNING ASSESSMENT FOR EACH PROGRAM OBJECTIVE** in compliance with standards passed by the Accreditation Council for Pharmacy Education (ACPE). ACPE is the body that accredits ASHP as a provider of continuing pharmacy education.

As a presenter, you share ASHP's mission to provide the best educational programs for all attendees. Maintaining ACPE accreditation status is vital to ASHP's mission. If you would like more information about the standards, visit: <http://www.acpe-accredit.org/standards/default.asp>.

#### How to Develop a Quality Program

Visit ASHP's **For Presenters** Website where you will find tools and resources to assist you in the development of a quality educational program reflective of ACPE Standards and ASHP's educational guidelines.

Visit: <https://www.ashp.org/Meetings-and-Events/Get-Involved-in-a-Meeting/For-Presenters>

### **ACTIVE LEARNING & LEARNING ASSESSMENT**

All CE sessions are required to incorporate **active learning strategies**, as well as a **learning assessment** for *each* of your session learning objectives. Active learning strategies engage the audience in the activity and should be appropriate for your session type as outlined in the table below. Learning assessment involves feedback to learners on how well they have answered questions or completed a learning exercise, such as a case study. Contact your Program Chair if you are unsure of the activity type for your session

### **MATCHING ACTIVE LEARNING STRATEGIES TO ACTIVITY TYPE**

Below are ideas on how to incorporate active learning into your session. This list should serve as a guide and is not meant to be comprehensive.

| Active Learning Strategy             | Knowledge-Based Activity | Application-Based Activity |
|--------------------------------------|--------------------------|----------------------------|
| Lecture with questions               | ✓                        | ✓                          |
| Games and quizzes to practice recall | ✓                        | ✓                          |
| Demonstration                        |                          | ✓                          |
| Example with practice                |                          | ✓                          |
| Interactive case study               |                          | ✓                          |
| Interactive scenario                 |                          | ✓                          |
| Role play                            |                          | ✓                          |
| Simulation                           |                          | ✓                          |
| Application exercises                |                          | ✓                          |
| Practice exercises                   |                          | ✓                          |

For more details, see **Appendix A**.

### **ASSESSMENT OF LEARNING AND ASSESSMENT FEEDBACK**

|                               | Knowledge-Based Activity  | Application-Based Activity   |
|-------------------------------|---|--|
| <b>Assessment of Learning</b> | Must include assessment questions structured to determine the recall of facts based on the learning objectives. Techniques can be informal such as audience response systems, color cards, or the raising of hands. | Must include case studies structured to apply the principles learned based on the learning objectives.                                     |
| <b>Assessment of Feedback</b> | Feedback may include the correct response to questions. For incorrect responses, communicate that a question was answered incorrectly and provide rationale for the correct response.                               | Feedback may include the correct evaluation of case studies. When responses are incorrect, explain the rationale for the correct response. |

### **COMMERCIALISM & BIAS**

CE programs must offer an independent, equitable view of the topic and be free from commercial bias and promotion. To comply with ACPE standards, ASHP processes are:

- **Presented materials will be reviewed by ASHP and modified as needed to comply with the standard.**
- The version that is reviewed and approved by ASHP is the **final** version to be presented and disseminated to attendees.
- Reviewed materials (slides, etc.) will be pre-loaded onto the computer in your session room onsite.

*\*\*Changes will be made ONLY if late-breaking information has become available, and will be made at the discretion of ASHP staff. In this case, email [EducServ@ashp.org](mailto:EducServ@ashp.org) with your request and justification.*

### **FINANCIAL RELATIONSHIPS**

ASHP requires that all prospective faculty, planning committee members, and others in a position to control content for continuing education activities, disclose all relevant financial relationships with commercial entities whose products and/or services will be discussed during the session.

- A "relevant financial relationship" exists if you (and/or your spouse/partner) are an employee, consultant, clinical investigator, author, shareholder, board member, speaker, or receive research support or other

financial benefit in any amount, from an organization whose products and/or services are to be discussed in the session. You must disclose all such relationships that have existed within the past twelve months.

- A “relevant financial relationship” also exists if your institution or hospital received support or other financial benefit in an amount equal to or great than \$5000 from an organization whose products and/or services are to be discussed.
- The financial relationship information you give here will be for *all* sessions you are participating in at this meeting. Prospective faculty members who refuse or fail to disclose their information in a timely manner may result in a session being ineligible for continuing education credit.



**ATTENTION: FAILURE TO DISCLOSE RELEVANT FINANCIAL RELATIONSHIPS IN A TIMELY MANNER MAY RESULT IN YOUR SESSION BEING INELIGIBLE FOR CONTINUING EDUCATION CREDIT.**

### ***PREPARING SELF-ASSESSMENT QUESTIONS AND ANSWERS***

#### **Consider:**

- Questions must be written either in multiple-choice or true/false format.
- Questions must be simple, clearly stated, and relate only to the educational objective for which they were designed.
- Pose the question in the affirmative; avoid the use of negative statements such as "not" and "except" because they often confuse the learner.
- Answer choices should be specific and distinct, and not overlap with the other answers.

Avoid using the same or similar words in both the question and the correct answer as this may clue the learner to the correct answers.

### **PowerPoint Slides**

A PowerPoint slide template will be provided by ASHP. All presenters should use this template to create their presentation. Review **Appendix B** for tips.

**NOTE: A single combined PowerPoint file** should be submitted for the entire session, and should be coordinated with your co-presenters.

- All PowerPoint slides must use an **aspect ratio of 16:9**.
- Slides must be received by the stated deadline. (See your Deadline Checklist.)
- **Slides must be on the official meeting slide template provided by ASHP.**
- **Do not include any company logos on any slides.**
- Do not put the CE code on any slides.
- All slides will be reviewed for commercial bias and edited by ASHP to conform to ACPE guidelines.
- The slides that are submitted to ASHP are considered final and changes are strongly discouraged. Presenters should contact their ASHP representative prior to the meeting if any changes are needed.
- If late-breaking information is released after submission of slides to ASHP, presenters should use a less specific slide and verbally announce the new information in the session.



## Supplemental Educational Resources

In response to requests from meeting attendees for resources that provide more in-depth information about each educational presentation in an easy-to-use format, ASHP posts **Supplemental Educational Resources** on the ASHP Leaders Conference Website approximately two weeks in advance of the meeting. We'd like **your** presentation to be part of this important resource as it will enhance attendee satisfaction for your session and the overall meeting.

- PDFs of your session's PowerPoint slides will be made available to all attendees online approximately two weeks prior to the meeting. However, if you still want to distribute hard copies at your session, you are responsible for copying and shipping an appropriate number.
- ASHP does not provide copying services onsite, nor can ASHP print additional copies if the amount you provide is insufficient.
- Do not bring hard copies unless you have discussed an appropriate quantity by emailing [educserv@ashp.org](mailto:educserv@ashp.org) for a recommendation.
- ASHP does **not** provide reimbursement for printing of supplemental educational resources.

### Documents will be uploaded *online*:

- Presenter biography if not already submitted (one paragraph, third person, approximately 160 words)
- Additional session material (such as work sheets, forms, checklists, policies, charts, etc.)
- Bibliography or reference list
- PowerPoint™ Slides

## AGREEMENTS AND DOCUMENTATION

The following items must be completed and submitted to ASHP according to the Deadline Checklist included with your confirmation letter.

### Presenter Agreement



ASHP will send a presenter confirmation to each presenter **once every presenter in your session has submitted their information online** (contact information, disclosure, recording and copyright agreements). This confirmation includes a letter describing the financial arrangements, responsibilities regarding hotel and travel arrangements, requirements for supplemental educational resources, and timetable by which all items need to be completed.

### W-9

ASHP must have a W-9 on file for all presenters receiving honoraria. If you have not received payment from ASHP in the past 24 months, have moved, or have had a name change, ASHP will need a new W-9. If you are uncertain when you last submitted a W-9 to ASHP, then be sure to submit a new one.

Download the form at: <http://www.irs.gov/pub/irs-pdf/fw9.pdf>

- Complete the W-9 Coversheet (<https://www.ashp.org/-/media/assets/meetings-events/docs/meeting-events-w9-cover-sheet.ashx?la=en>)
- Send completed coversheet and W-9 form to [fmdw9@ashp.org](mailto:fmdw9@ashp.org) or fax to 301-634-5944.\*
- Use the tax ID number if honorarium will be made payable to a company.

**\*Important:** Do not upload your W-9 online or send it anywhere other than the email address or fax number provided. This email address and fax number are secure and go directly to the ASHP Finance department.

## Recording Agreement

ASHP may audio record your session and sync with your PowerPoint™ slides. Recordings may be used for any of the following:

- Archival purposes
- Sale to meeting attendees and those unable to attend the meeting
- Posting to the ASHP Website
- Other media as outlined in the agreement



Note:

- All presenters, including the moderator and facilitators, are required to complete the Recording Agreement.
- Presenters are not required to be recorded; however, if any presenter refuses, the entire session will **not** be recorded.

The agreement covers all audio and video throughout a presentation.

## Copyright Agreement

All presenters must obtain all necessary written permissions and releases for the use of any and all third party-produced materials (e.g., cartoons, photographs, articles and tables from published materials) associated with their presentation. Be aware that permissions may require 2-6 weeks for approval. ASHP requires that all presenters agree to the following statement:

*I have the full authority to enter into this agreement and will obtain all necessary copyright permission or licenses from any individuals or organizations whose material is excluded or used in my presentation. I agree to indemnify and hold harmless ASHP against any claims, losses, expenses or damages that may be incurred by ASHP as a result of my presentation. In particular, I agree that the use of any materials prepared by me will not expose ASHP to liability for breach of confidence for infringement of copyright or similar liability.*

See your *Copyright Handbook* for guidelines on how to comply with copyright law.

## Biography and Photo

**NEW!** All presenters are now **required** to submit a brief professional biography and headshot. They will be featured in meeting publications, promotions, and on the mobile app.

### ***BIOGRAPHY***

You are asked to submit a brief biographical sketch of yourself that will be included in activity materials. The deadline for submitting this is noted on your Deadline Checklist. When preparing your bio sketch, follow this general format: (Please note the 160 word limit.)

- Full name and credentials with statement of current position.
- Education and training (e.g., residencies, fellowships) (note: years of completion are generally not included).
- Pertinent research and practice interests.
- Professional achievements (e.g., relevant professional memberships and involvement, leadership positions, awards)

### ***PHOTOS/HEADSHOTS***

Photos are often included in activity materials, so submit your photo in electronic format. Photos should reflect a professional image. Images must be of the type JPG or PNG (>100KB).

## Hotel and Travel

Refer to your presenter confirmation email for details on how to book your hotel and travel.



## BUDGET AND COMPENSATION



Your confirmation letter specifies whether or not you will be receiving complimentary registration and/or honorarium.

## Honoraria

Your confirmation letter from ASHP will indicate if you are eligible to receive an honorarium. All funds will be dispersed to presenters as **HONORARIA**.

- Checks will be dispersed approximately four weeks after the meeting.
- Checks will be dispersed only for those presenters who have submitted a W-9 or who have them on file with ASHP. Checks will be made payable and sent to the name and address on the W-9 form.
- A 1099 will be distributed in January, following the meeting. (For example, paid in 2017, 1099 in January 2018.)
- Under special circumstances, ASHP will allow a presenter to receive their funds as expense reimbursement. A written request must be sent to: [EducServ@ashp.org](mailto:EducServ@ashp.org)
- To comply with federal income tax regulations, all presenters receiving honoraria must submit their Social Security number or Tax ID number to ASHP on an IRS W-9 form.

ASHP retains final approval for all budget allocation. Justification for proposed variations or exceptions from the honoraria guidelines must be sent to [educserv@ashp.org](mailto:educserv@ashp.org).

### Attention Federal Employees

ASHP is aware of the many guidelines and restrictions regarding reimbursement for employees of the U.S. federal government. Although submission of meals and incidental expenses receipts may not be required by your particular agency, ASHP REQUIRES YOU TO SUBMIT ORIGINAL RECEIPTS FOR ALL ITEMS YOU WISH TO BE REIMBURSED. This includes all meals, hotel, transportation, and parking. Since ASHP is NOT a federal agency, ASHP is subject to external auditors who require original receipts for all items for reimbursement. ASHP will only issue reimbursement for those items for which an original receipt has been submitted. Regarding maximum daily reimbursement rates, ASHP will adhere to guidelines per the U.S. General Services Administration ("G.S.A. Per Diem Rates") if required by your agency.

## Complimentary Registration

- Your confirmation letter from ASHP will indicate if you are eligible to receive a **complimentary meeting registration**. **If so, do not register yourself**. ASHP will complete the paperwork, and you will receive your confirmation prior to the meeting.
- Complimentary registrations are for this meeting only and are non-transferrable.

## AT THE MEETING

### When You Arrive

- All educational sessions and activities will be held at the primary meeting location unless otherwise specified. You may pick up your badge and other materials at Registration.
- Business casual dress is suggested for attendees for all meeting sessions, although presenters usually wear business attire. Since room temperatures in the convention center may be difficult to regulate, we suggest that you dress in layers to ensure your comfort at all times.
- Rehearse your presentation carefully and do not speak longer than your allotted time.

### Audiovisual Equipment

At the meeting, a roving AV technician will be available to assist you as needed in the session room. All slides will be pre-loaded onto the session room laptops.

All educational sessions will be equipped with a standard audiovisual (AV) set. This set includes:

- Laptop Computer\*
- LCD Projector
- Screen
- Laser Pointer/Slide Advancer
- 1 Podium Mic
- Floor Mic(s) (handheld)
- 1 Lavalier Mic (for each presenter)

*\*Presenters are not permitted to use their own laptops.*

### Room Sets

All educational session rooms will have a standard room set. This room set includes:

- Classroom or roundtable seating as determined by ASHP (for workshops).
- Raised podium with lectern (for plenaries).
- Head table with chairs on podium as determined with your ASHP staff representative based on planned activities.



ASHP cannot provide office supplies or references such as pencils, pens, post-it notes, index cards, scotch tape, dictionaries, text books, baskets, etc. If desired, presenters may supply their own. ASHP will not reimburse any extra expenses incurred should you decide to provide such items.

**AV requests cannot be accommodated onsite.** Confirm any additional audiovisual equipment for your session with your Program Chair prior to the meeting.

## Delivering Your Presentation

1. Arrive at the session room 30 minutes **before the start of the session**. Use this time to orient yourself to the podium, microphone, etc. An ASHP staff member will also be assigned to check in with each session to assist with problems.
2. **Begin with a “grabber.”** Think of an attention-getting opening for your portion of the program. Some ideas for doing this include presenting an interesting or unusual fact, thought-provoking quote or cartoon related to your topic. A personal experience illustrating the need for the information to be presented may work well.
3. **Volume:** Your goal should be to speak loudly enough to be easily heard but not so loud as to make it uncomfortable for participants to listen.
4. **Pace:** If your pace is too fast, your material will be hard for learners to absorb. If it is too slow, their attention may wander.
5. **Pitch:** Listeners favor lower-pitched voices so keep this in mind and aim for lower part of your range while remaining natural.
6. **Variety:** As you know, a monotone can induce boredom so strive for a range of vocal variety to keep learner interest.
7. **Clarity:** Enunciate clearly so participants can easily understand you.
8. **Try this:** Sometime when you are alone (while driving for example), try reciting the alphabet in many different ways. Say some letters loud, some soft and all the variations in between. Say them fast and slow, high and low. While you may feel silly, this will acquaint you with your range of possibilities in using your voice during presentations.
9. **Avoid vocal fillers:** “Ah”, “um”, “you know”, “so”, throat-clearing, etc.
10. **End with a “bang”.** People remember best what they hear first and last. You’ve already done your “grabber” at the beginning. Make your ending count, too. Summarize the points you want your audience to leave with. Incorporate a way to make these points memorable, such as with an illustrated story, anecdote or picture

## ADDITIONAL RESOURCES

<https://www.ashp.org/Meetings-and-Events/Get-Involved-in-a-Meeting/For-Presenters>

The spot every presenter should visit for tools, resources, and guidance.

<https://www.acpe-accredit.org/continuing-education-provider-accreditation>

ACPE Standards for educational activities.

## CONTACT US

### **ASHP Educational Services Division**

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**Plenary & Workshop Faculty:** Cynthia von Heeringen ([cvonheeringen@ashp.org](mailto:cvonheeringen@ashp.org)) 301-664-8602

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**Travel Questions:** Diane McCleskey ([dmcleskey@ashp.org](mailto:dmcleskey@ashp.org)) 540-785-6088

*"We bring CE to life."*

## APPENDIX A: ACTIVE LEARNING STRATEGIES

|  |   |
|--|---|
| <p style="text-align: center;"><b>Polling</b></p> <p>Get to know your learners by asking about who is in the audience. Examples: “By a show of hands, how many clinical specialists are in the audience?”</p> <ul style="list-style-type: none"> <li>• How many directors?</li> <li>• How many from small/rural hospitals?</li> <li>• How many from the west coast?</li> <li>• How many have implemented an informatics program before?</li> <li>• How many have some experience with medication reconciliation?”</li> </ul> <p>Choose factors about the audience that are relevant to your topic and poll so that you and your learners can see who is there. Polling can ask questions about what the learners are doing related to the material. Relate the responses to the polling questions to the session topic.</p> <p>Examples:</p> <ul style="list-style-type: none"> <li>▪ “How would you describe your level of implementation of medication reconciliation processes? High? (show of hands) Medium? Low? Today you’ll learn how to increase the implementation of these programs.”</li> <li>▪ “How many of you have an emergency pharmacist in your ED?” How many are full-time? How many are more than half-time? How many are less than half-time? In today’s session we’ll show you how to get support for increasing pharmacist time in the ED.”</li> </ul> <p>This method can be used with an electronic Audience Response System (ARS) or with the “low-tech” version: hand-raising. </p> | <p style="text-align: center;"><b>Questions / Quizzes / Tests / Games</b></p> <div style="text-align: right;"></div> <p>Ask multiple-choice or true/false questions. Have participants raise their hands for the different response options or simply have them note their answer privately, then provide the answer. Questions can be used at the beginning, during and/or at the end of a session. Pre- and post-test questions can be used to start and end a session. Questions can be turned into a game such as “Jeopardy” by giving the answer and asking participants to identify the question. An example of a question used at the 2008 Summer Meeting Joint Commission session by presenter Darryl Rich was:</p> <p>“For MM.2.20 – Medication Storage, which of the following was the top compliance issue scored on 2007 surveys:</p> <ul style="list-style-type: none"> <li>A. Refrigerator temperature checks</li> <li>B. No policy on how medications handled from removal/dispensing to medication administration and returned if not used.</li> <li>C. Medication Security</li> <li>D. Narcotic Control &amp; Wastage”</li> </ul> <p>A “Jeopardy” question in a session on active learning strategies was:</p> <p style="padding-left: 40px;">The answer is: “A hand-raising activity good for engaging an audience at the beginning of a session.”<br/>The question is: “Polling.”</p> |
| <p style="text-align: center;"><b>Self-Assessment</b></p> <p>Have the participants complete a self-assessment tool that gives them insight into their current knowledge or skill level and helps them identify their need for the information the session will be covering. The tool can be formal (a commercially available instrument, such as the “Insight Inventory” for leadership skills (<i>Insight Institute, Inc.</i>) or an informal self-created scale that may, for example, ask participants several questions about their level of skill or experience in different aspects of your topic. For example, an informal self-assessment of presentation skills asks participants to rate their level of agreement with statements such as, “I make appropriate use of gestures when appropriate.” and “I make eye contact with audience members.”</p>  | <p style="text-align: center;"><b>Interactive Scenario</b></p> <p>A scenario describes a situation to be effectively resolved, requiring the skill(s) being taught in an educational program. The participants discuss what they think should be done in the situation. An expert gives feedback to participants. Participants can discuss in small groups, then report their ideas to the whole group. You, as the expert, give feedback on whether or not their ideas are likely to be effective. In addition, fellow participants can share experiences and feedback.</p> <p>For example, for a program for supervisors on performance appraisal skills, describe a problem employee and ask how they can be most effectively managed during their performance review.</p>   |
| <p style="text-align: center;"><b>Application Exercise</b></p> <p>In an application exercise, participants are asked to apply, or think about how they will apply, what they have learned. Participants may do this type of exercise independently, such as by filling out a worksheet designed beforehand for this purpose, or they can be asked to discuss it with others near them.</p> <p>For example, participants can be asked to list challenges and obstacles they may face and strategies for overcoming the obstacles when implementing an informatics project, or they could form small groups and list steps they will take to apply something in practice that they have learned in the session. An advantage of working with others is that participants can brainstorm together and hear different perspectives.</p>  | <p style="text-align: center;"><b>Interactive Case Study</b></p> <p>Present a case in which you ask the participants to answer questions about the patient and their treatment. For example, what information do they need about the patient? What treatment do they recommend? How would they handle new developments in the case that you describe to them?</p> <div style="text-align: right;"></div>   |

## APPENDIX B: POWERPOINT AND YOU

### PowerPoint and You

Your slides should *serve rather than control you*. You're an excellent presenter; even so, PowerPoint can hijack your presentation. You don't want that to happen. With that in mind, here are a few ideas to liberate you to give your best presentation ever.

- Your audience consists of bright, well-educated people. Never read your slides to your audience. They can read the words on your slides much faster than you can speak them. This difference only serves to jumble your information in their brains, resulting in them remembering less of it.
- Every slide should have very few words – that can be read from the back of the room.
  - Use **between 15 – 30 words per slide**
  - Use **6 lines or less** of text per slide
  - Your point size should be **large**. In a large conference room, the size of your words – depending on the font – should be from **30 to 40 points!** Never less than 24 points regardless of the font type.
- Use slides merely as indicators of what you have to present – to let your audience know where you are in the program. Use them like stepping stones to go from beginning to topic to another.
  - The agenda of your activity
  - Full-screen title slides to announce major presentation transitions
  - Headings and titles at the top of your slides
  - Active learning activities – questions (polling, multiple choice), brief case scenarios, and the answers
  - Summary and Conclusion slide(s) – what was addressed and overall points to take away.
- Additional Pointers:
  - A good use of slides is for displaying graphical information – the kind that is difficult to describe – but that is large enough to be seen by your audience.
  - Incorporate pictures when appropriate – to add interest, reinforce themes, or incorporate humor.
  - Effective use of a figure or picture – rather than words – keeps your audience engaged. Show in a few seconds what could take minutes to explain.
  - Obtain copyright permissions as appropriate.
  - Spellcheck the slides.

**In spite of all this – if your charts are too detailed and tiny for your audience to read,  
Ask yourself, “Why am I showing them?”**

#### Summary

Your PowerPoint presentation is finished and ready to submit to ASHP. Now, ask yourself these last two questions:

1. Do my slides contain just the right amount of information to guide the audience through my session?
2. Will the person in the back third of a packed convention room be able to see the information I have on my slides?

If you have answered “Yes”, then you are on your way to an optimizing the educational experience for your attendees! Remember to share your PowerPoint slides with all presenters in your session. If you have any questions or need further information, then do not hesitate to contact the Educational Services Division at

[EducServ@ashp.org](mailto:EducServ@ashp.org)