



# NLM SIS Conference Exhibit Evaluation Plan

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## Preface

The NLM SIS conference exhibit program is a far-reaching effort to communicate with the people who currently use NLM programs and services or might use them in the future. Through the exhibit program, NLM SIS staff members build recognition for the NLM SIS *brand* or *identity*, obtain feedback from users, learn about “competitors” who offer similar or complementary services, and keep up with trends and changes in their professional fields. Other goals of the conference exhibit program include identifying and supporting individuals and organizations that serve as partners or intermediaries by conveying information about NLM SIS products and training people to use them.

Because the conference exhibit program began in the 1980s, there are already a number of planning, staffing, monitoring, and reporting processes in place. Even so, it is difficult to gauge the success of the conference exhibit program for several reasons. NLM SIS online resources are used by so many people it is impossible to attribute changes in usage to exhibit participation. Because NLM SIS does not “sell” anything, many of the conference-related success indicators used by for-profit organizations are not relevant. Furthermore, most comprehensive exhibit evaluation processes require formal clearance from the Office of Management and Budget.

This evaluation plan is designed to provide practical and realistic guidance for planning, implementing, evaluating, and hopefully improving the conference exhibit program. The environmental scan, based on document reviews and conversations with NLM SIS and contractor staff, aims to provide information about the current exhibit program from a different and more comprehensive perspective than has been used before. The literature review connects the findings from business and other sources to the current exhibit program and offers ideas for both evaluating and improving the program in the future. The evaluation plan recognizes that some of the current reporting tools do not, and probably will not ever, provide the data needed for the most robust conference exhibit program evaluation. For this reason, this plan suggests using the conference data that are currently available and considering some different options in the future.



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**National Library of Medicine (NLM)  
Specialized Information Services (SIS)  
Conference Exhibit Evaluation Plan**

## **1. Introduction**

The Specialized Information Services (SIS), Office of Outreach and Special Populations, is the division of the National Library of Medicine (NLM) responsible for the collection and dissemination of health information that addresses the health information needs of health professionals, minority and underserved populations, and the public. The promotion of NLM's resources through conference exhibits is an important component of outreach efforts. SIS both funds and provides staff at conference exhibit booths for approximately 40 conferences per year. The Oak Ridge Institute for Science and Education (ORISE) provides assistance for many of the logistical tasks associated with the exhibit program.

### **1.1 Objective**

The purpose of this project is to develop an evaluation plan for SIS to implement that provides feedback on the effectiveness of its exhibit program and how well it reaches and meets the needs of target audiences.

Lockheed Martin Aspen Systems (LM Aspen) conducted two phases of research prior to the development of the NLM SIS evaluation plan. The first phase consisted of a systematic assessment of the context in which the evaluation will take place as well as the specific needs of NLM SIS (the environmental scan). The second phase consisted of a search of relevant literature to identify effective methods to consider incorporating into the NLM evaluation (the literature review). The results of these preliminary phases form the building blocks for the development of the NLM Conference Exhibit Evaluation Plan.

### **1.2 Organization of Report**

Section 1 provides the introduction and Section 2 presents the methods for the environmental scan and literature review. Results are presented separately in Section 3 (environmental scan) and Section 4 (literature review). Section 5 includes the evaluation plan along with a set of recommendations for improving data collection and analysis and for increasing the participation of target audiences.

In addition, the following eight appendices contain supplemental information pertaining to the project:

- Appendix A: Key Informant Discussion Guides
- Appendix B: List of NLM SIS Materials Collected
- Appendix C: List of Target Audiences

- Appendix D: FY 2005 Conferences and Target Audiences
- Appendix E: List of Collateral Materials and Promotional Items
- Appendix F: Sample Conference Exhibit Report From ORISE
- Appendix G: Screen Shots of Conference Information From the NLM External Exhibit System
- Appendix H: List of Potentially Relevant Citations From Literature Search

## 2. Methodological Approach

This section provides information on the approaches used to conduct the *environmental scan* and *literature review*.

### 2.1 Environmental Scan

This phase included several tasks to assess how NLM is currently conducting its conference exhibit program and the evaluation efforts undertaken in the past. In order to review a complete year of conference exhibits, the environmental scan focused on fiscal year (FY) 2005 (i.e., October 1, 2004 through September 30, 2005). This phase also involved collecting information about the other educational and communications initiatives NLM staff members used to promote products and services. Primary activities included the following:

- **Key informant discussions.** Discussions with key NLM and ORISE staff members involved in conference selection, exhibit planning and participation, and related marketing and communication initiatives.
- **Document review.** Review of the current NLM SIS and ORISE conference exhibit forms and reports.
- **Assessment of NLM External Exhibit System.** Assessment of the database currently used to track, monitor, and report on conference participation.

#### 2.1.1 Key Informant Discussions

The evaluation of the conference exhibit program will be more effective if it is developed through a cooperative approach that incorporates feedback and insights of key individuals with a shared investment in the program's success. The discussion session held with key NLM staff members was intended to clarify evaluation priorities in relation to SIS's overall goals and constraints, as well as to identify gaps between current evaluation efforts and perceived evaluation needs. The telephone interview conducted with ORISE provided insights into the logistical aspects of the program. NLM staff members assisted LM Aspen in identifying the NLM and contractor staff to participate in these discussions.

**Development of key informant discussion questions.** The LM Aspen team, in collaboration with NLM, developed a tool to guide the discussion with NLM staff. The discussion guide included 25 open-ended questions and focused on the following key topics:

- Goals, objectives, and target audiences
- Exhibit selection process
- Conference activities
- Conference exhibit monitoring, tracking, and reporting

One discussion session was held on March 14, 2006 with a group of five NLM staff members. Ann Poritzky led the discussion with assistance from Shinta Hernandez and Nora Cook, all of LM Aspen. The following individuals from NLM participated in the discussion:



- Gale Dutcher, Head, Office of Outreach and Special Populations
- Jeanne Goshorn, Biomedical Information Services Branch Chief
- Marti Szczur, Deputy Associate Director
- Stacey Arnesen, Advisor for Special Projects, Specialized Information Services
- Cindy Love, Technical Information Specialist, Office of Outreach and Special Populations

In order to learn more specific information about conference exhibit planning, preparation, and staffing, a separate telephone discussion was held with Rose Foster, Manager, Medical Education and Outreach Programs, ORISE. Ann Poritzky led the discussion with assistance from Nora Cook. Key topics addressed in this discussion included:

- Exhibit preparation
- Target audiences
- Information/messages conveyed
- Conference exhibit monitoring, tracking, and reporting

The two discussion guides are provided in appendix A.

### **2.1.2 Review of Materials**

An important part of understanding the overall SIS evaluation program included a review of documents and other materials pertaining to the program. NLM SIS and ORISE staff identified relevant documents and promotional items and provided them to LM Aspen staff in early 2006. A complete list of the materials collected by LM Aspen staff for this project can be found in appendix B.

### **2.1.3 Assessment of NLM External Exhibit System**

NLM has developed a Web-based exhibit database to record information pertaining to the selection, planning, and execution of conference exhibits. This database was also reviewed as part of the environmental scan to assess its usefulness and to consider how it may be improved. The Web address of the database is <http://wwwcf.nlm.nih.gov/webexhibits/Login.cfm>.

The results of the environmental scan are provided in Section 3.

## **2.2 Literature Review**

The second preliminary phase included a literature review to identify current methods of exhibit planning, implementation, and evaluation, and to draw on the experience of others in the field of information science and marketing. The objective of the literature review was to identify, select, and summarize literature relevant to the evaluation of exhibit programs similar to NLM's program. The literature search addressed the following research questions:

- How do organizations use conference exhibits and trade shows?
- How do organizations select conference exhibits and trade shows in which to participate?

- How do organizations evaluate participation in conference exhibit and trade shows?
- How do organizations boost the overall effectiveness and cost effectiveness of conference exhibit and trade show participation?

**List of sources.** The following five databases were searched for relevant citations:

- Combined Health Information Database (CHID)
- EBSCO Information Services
- Health and Psychosocial Indicators Database (HAPI)
- InfoTrac Thomson
- PubMed
- American Society of Association Executives (ASAE) Knowledge Center

**Keywords.** The following keywords were used to search within the databases: conferences, exhibits, marketing, exhibit planning, exhibit evaluation, trade shows, trade show marketing, trade show planning, trade show evaluation, health fairs, trade shows and giveaways, poster presentations, trade show effectiveness, exhibit design, trade shows and training, and outreach and conferences.

The results of the literature review are presented in Section 4.

### **3. Results: Environmental Scan**

Information on the current approach used by NLM SIS was acquired through the environmental scan, which included discussions with key staff, review of relevant documents, and assessment of the NLM External Exhibit System. The findings are summarized as follows:

- Current status, goals, and objectives
- Target audiences
- Selection of conferences
- Exhibit preparation
- Conference activities
- Monitoring, tracking, and reporting

#### **3.1 Current Status, Goals, and Objectives**

The current NLM SIS exhibit program includes approximately 40 conference exhibits per year focusing on health, toxicology, and environmental topics (38 conferences were conducted in FY 2005). The conferences are typically national in scope and are held throughout the United States. Most focus on professionals, but recently NLM SIS has participated in an increasing number of consumer-oriented meetings.

The goals of the program are to:

- Show the NLM SIS wares to current and prospective users.
- Obtain direct feedback on products and services.
- Learn about what current and prospective users are doing and/or what they need from NLM SIS.
- Help staff keep up with trends in the field.

The objectives include:

- Introduce prospective users to NLM SIS products and services.
- Provide updates about products and services to current users.
- Maintain a presence at meetings and conferences that serve target audiences.
- Recruit respondents for focus groups or job applicants.

#### **3.2 Target Audiences**

One of the major reasons NLM SIS invests in conference exhibits is to reach and communicate with a wide range of target audiences. The exhibit program reaches the primary target audiences and primary special populations listed in appendix C. These target audiences were identified through discussions with Cindy Love of NLM SIS and Rose Foster of ORISE.

### 3.3 Selection of Conferences

The selection process for conference exhibits begins during the previous fiscal year—usually 9 to 12 months before the conferences are scheduled. Ms. Foster of ORISE prepares and submits a list of conference exhibit recommendations to NLM SIS.

Gale Dutcher and Jeanne Goshorn make the final conference exhibit selections. The following elements are considered in the decision making process:

- **Target audiences.** Does the conference appeal to specified target audience(s)?
- **National in scope.** Does the conference attract a national audience?
- **Staffing.** Does the timing of the conference allow for appropriate NLM SIS staff to attend?
- **NLM presence.** Is it important for NLM SIS to have a presence at the meeting?

Marti Szczur and representatives from the regional medical libraries (RML) also contribute to the selection process by recommending conferences to consider. In many cases, Ms. Szczur suggests exhibiting at conferences where she or her staff members are making presentations. The NLM conference schedule does not usually include health fairs or regional or local conferences.

Although the majority of exhibits are selected during the previous year, five or more may be added during the fiscal year in which they occur. These late additions are usually regional meetings or conferences sponsored by other government agencies.

A chart showing the FY 2005 conferences and the target audiences NLM SIS planned to reach is provided in appendix D.

### 3.4 Exhibit Preparation

**Logistics.** Most of the conference logistics are handled by ORISE staff members. In addition to recommending and staffing conferences, ORISE also does the following:

- Registers NLM SIS to exhibit at the conferences
- Produces full-size and tabletop exhibit displays
- Produces materials and giveaways
- Selects exhibit floor locations
- Ships displays, handout materials, and giveaways to conference locations

NLM SIS has three full-size exhibit displays that were produced by ORISE. One display focuses on toxicology and environmental health information and is used for professional society meetings, one features HIV/AIDS-related resources, and one is a consumer health-oriented exhibit. ORISE also produced tabletop displays featuring the same three topics. ORISE selects exhibit displays based on the size of the conference or meeting and the role of NLM SIS at the meeting.

**Staff training.** There are a few different kinds of training for exhibit booth staff. Periodically, NLM conducts training on “basic booth etiquette” but not on specific content. ORISE staff

members are trained on content, NLM SIS products and services, and how to respond to visitors' questions. When new NLM SIS and ORISE staff members work at exhibits, more experienced staff members are present to provide informal training and assistance. Experienced NLM SIS staff members also meet with new employees for training before they attend their first conferences.

**Pre- and post-exhibit communications.** For toxicology conferences, staff members send messages about exhibits to NLM SIS listserv recipients before the conferences take place. In the past, staff sent postcards to promote health-related conference exhibits, but only a small number of people responded to the postcards. NLM SIS managers have not had much success with pre-conference mailings, so it is likely they will not do these mailings again. To date, NLM SIS has not done any post-conference communication or formal follow up.

**Giveaways and collateral materials.** NLM SIS and ORISE staffs have developed many different collateral materials and giveaway items for exhibits. A list of the materials, giveaways, and associated NLM SIS products and services is included in appendix E.

When asked about booth visitors' responses to giveaways, the managers expressed concerns about their effectiveness. They said that giveaways, such as Toxie Cats, "bring people to the exhibit, but then the visitors don't listen to what the staff has to say." They further noted that giveaways are very expensive and although they may attract customers, it is unknown whether they send the intended message. To date, no one at NLM has formally evaluated the impact of giveaways.

### 3.5 Conference Activities

**Exhibit staffing.** At most exhibits, two people staff the booth—one from ORISE and one from NLM. For some exhibits in the Washington, DC area, one or two people from NLM SIS will staff the booth to save the cost of travel for ORISE staff. For some small meetings, one NLM SIS staff member or one ORISE staff member will handle the exhibits.

**Interactions with exhibit visitors.** When visitors pause or stop at the exhibit booth, ORISE staff will ask "Are you familiar with NLM?" If visitors seem interested, the staff will continue talking about NLM SIS's products and services and offer a demonstration. At some conferences, staff members ask visitors if they are interested in signing up for the NLM SIS listserv. ORISE staff members are very familiar with NLM SIS products and services so they can answer most questions. If ORISE staff members are not able to answer a question, they refer visitors to the NLM SIS staff person or offer to get the information later and contact the visitors.

NLM SIS has used a variety of strategies to attract visitors. Some exhibitors prearrange meetings with conference attendees. Most of the time NLM SIS staff does not prearrange meetings with conference attendees. This is because the booth staff can usually answer questions quickly without leaving the booth. Because all of the NLM SIS resources are online, staff members do not plan to contact visitors after conferences. Neither NLM SIS nor ORISE staff members collect contact information from booth visitors.

**Collateral Materials and Giveaways.** ORISE and NLM SIS staff members select or produce the print materials and giveaways for each conference based on the subject matter and target audiences (see appendix E).

**Conference Sponsorships.** In FY 2005, NLM SIS sponsored two U.S. conferences on AIDS and the Annual Symposium on Career Opportunities in Biomedical Sciences. NLM SIS also purchased advertisements in the program books of a few other conferences.

### **3.6 Monitoring, Tracking, and Reporting**

NLM SIS uses reports from ORISE and the NLM External Exhibit System to monitor and track the results of conference exhibit participation and to guide future conference selection. After each meeting, ORISE staff members prepare a summary report that includes the number and types of visitors who came to the exhibit booth, inquiry topics, popular materials and giveaways, etc. The reports also offer suggestions about whether the exhibit should be considered again in the future. A sample ORISE report is provided in appendix F.

The NLM External Exhibit System is a Web-based database that was developed without any involvement by NLM SIS staff. Currently, no funds are available to improve the system. The database contains SIS conference information from FY 2003 to the present. There is information about one conference in FY 2003 and 34 conferences in FY 2004 and FY 2005. (Because only one SIS conference was listed for FY 2003, it is likely that the database was not fully operational that year.) See appendix G for screen shots of conference exhibit information from the database.

The database contains lists of national exhibits or conferences that were proposed or conducted during each fiscal year and the responsible unit within NLM. (For this report, the responsible unit is SIS.) Each conference entry lists the following information:

- Sponsoring organization
- Type of meeting
- Status (promoted, accepted, or rejected; this can be changed to either “accepted” or “rejected” after NLM SIS or contractor learn more about the specific conference exhibits and NLM SIS staff members make final decisions about participating)
- Scheduled dates and locations
- Targeted types of professionals and/or populations (such as racial and ethnic minority groups)

In addition, the conference data entry form includes fields to record the following conference exhibit information:

- Booth size, structure, and location
- Number of conference attendees
- Number of exhibit visitors

- Number of NLM demonstrations
- Total exhibit hours
- Number of other exhibits
- Number of full-time staff at exhibits
- Name of staff members present at exhibits
- Efforts made to promote NLM presence prior to the exhibits
- Recommendation as to whether NLM should have a presence at future meetings of this organization, along with the rationale for the recommendation
- NLM resources highlighted during the meeting
- Whether promotional products were distributed at the exhibits and, if so, a list of the products
- Costs (e.g., for booth space and other booth costs, draying/handling, Internet connections, travel)
- Staff comments

There are some limitations to the functional utility of the database. For example, the data cannot be filtered by any of the variables listed above. Staff members can generate conference schedules by fiscal year only; conference summaries that include lists of responsible units and up to four target audiences; and conference histories. When asked, NLM SIS managers said they would like the database to have more useful reporting capabilities. Ms. Szczur suggested adding database mapping options that would show where conferences were held. However, as stated previously, there are currently no plans to improve the database capabilities.

## 4. Results: Literature Review

This section presents the results of the literature search and a synthesis of findings and recommendations from the literature reviewed for this project as it relates to the key research questions.

**Search results.** A total of 76 citations were identified in the initial literature search. A review of these citations resulted in 49 citations (64%) that were potentially relevant to the project as of February 10, 2006. These preliminary results, along with the reference list of 49 citations, were provided to NLM SIS at that time.

Subsequently, an additional 6 references were identified as potentially relevant. The total of 53 references, that were identified as potentially relevant, are provided in appendix H. LM Aspen reviewed these documents; the most useful ones are cited in the literature review results that are discussed below.

### 4.1 Introduction: Using a Marketing-Oriented Model

Overall, books and periodicals in the business field provided the most useful and relevant literature on conference exhibits. Although the business-oriented resources focus on marketing, sales, and profits, they contain valuable information for nonprofit organizations such as NLM SIS.

The recommendation that conference exhibits should be part of an overall marketing and business strategy was repeated many times in the literature reviewed for this project. Therefore, this report includes a brief overview of marketing and how the business terms and concepts from the literature relate to the NLM SIS conference exhibit program.

In her article *Dodging Common Marketing Mistakes*, Karla Taylor (2006) explains that too many people think “marketing is something we do.” She explains that marketing is “much broader than promotions” and extends to “anything at all that helps or hinders sales or the use of the product or service.” Furthermore, she explains, “Before you race off to **do** marketing, you should think: *What is the problem I am trying to solve?*” Based on the answer, staff members can prepare products and services to solve the problem(s) and inform target audiences about the solutions. This is the true essence of marketing and marketing communications.

In business literature, conference exhibits are often referred to as “trade shows.” These terms are used interchangeably in the following sections. At conference exhibits, NLM SIS staff use what business people would refer to as a “consultative” selling process. This means that the staff members try to learn what target audiences need and offer solutions based on the products/services available from NLM SIS. Though not referred to as sales “leads,” NLM SIS exhibit staff members try to talk to people who have a compelling need for and can use NLM SIS products and services. They also try to talk to individuals who can serve as intermediaries or partners in efforts to inform and train others who may need NLM SIS products/services. As staff members talk to visitors they use a process similar to “qualifying leads” in sales. For example, they ask questions to determine if visitors are among the primary target audiences, if they need



the available products/services, and/or if they are interested in and qualified to serve as partners or intermediaries for NLM SIS.

The summary of the literature review is organized into the following four sections, which correspond to the key research questions about the conference exhibit program:

- **Current uses** of conference exhibits and trade shows
- **Selecting** conference exhibits and trade shows
- **Evaluating** conference exhibits and trade shows
- **Boosting effectiveness** of conference exhibit participation

## 4.2 Current Uses of Conference Exhibits and Trade Shows

Several authors provided a description of conference exhibits and trade shows, their purpose, and why they are important. In her article, “How to Avoid Common Exhibit Marketing Mistakes,” Susan Friedmann says, “Trade shows incorporate marketing communications elements, including: market research, public relations, advertising, sales promotions, personal sales, and electronic media” (9). She says, “Trade shows are so powerful because they are the only marketing communications vehicles to incorporate all these elements” (9).

Margit Weisgal, author of *Show and Sell: 133 Business Building Ways to Promote Your Trade Show Exhibit*, says that the ultimate goal of trade shows, “no matter what you are exhibiting and promoting, is to *speak—one on one—with as many people as possible*. Trade shows are created to facilitate a situation where you and your staff can experience easy, quick, high-speed qualification of prospects and customers” (30).

Weisgal explains that trade shows are for “buyers to reduce the time, cost, and confusion related to purchasing.” Research by the Center for Exhibition Industry Research (CEIR) shows that “buyers consider trade shows to be their number one source for purchasing information—ahead of twelve alternative resources, including trade publications, sales reps, directories, catalogues, on-site visits, and outside consultants” (17).

**Why organizations participate in trade shows.** Authors cited many reasons for participating in conferences and trade shows. In her article, “Your Roadmap to Tradeshow Success,” Michele Lando says, “There are two good reasons to participate in a trade show. The first is lead generation and the second is awareness.” Ruth Stevens, author of *Trade Shows and Event Marketing*, adds, “Trade shows are an expensive way to merely gather names, but an efficient way to gather qualified leads. Qualified buyers are coming to you at the show, and they are eager for information and solutions” (15).

The literature shows that organizations use conference exhibits to reach specific types of audiences, including the following:

- **Present customers.** This audience includes people who are already using the organization’s products and services.

- **Potential customers.** This audience includes people who are likely to have a need for, but do not currently use, the organization’s products and services.
- **Intermediaries or prospective partners.** This audience includes people who can influence or instruct others on how to use the organization’s products or services. This audience may also include people who are interested in forming partnerships to convey information about products and services.
- **Consultants.** This audience includes people who are paid to advise others on products and services.

Organizations participate in conference exhibits because they offer opportunities to do the following:

- Interact with current customers face to face to introduce new products/services, provide training, respond to customer concerns, and identify new prospects.
- Identify new prospects and begin new relationships with current and potential users.
- Meet high-level and hard-to-reach decision makers and others holding influential positions who attend conferences to keep up with their industry, but may not respond to other marketing communications.
- Establish the organization’s position in the industry, obtain publicity or press coverage, and conduct market research. (As used here, positioning is the process of creating the identity or image of an organization’s products or services in the minds of target audiences.)
- Recruit partners or intermediaries.

When assessing the importance and uses of trade shows, it is also important to understand their limitations. For example, trade shows are expensive compared with other means of communication. Without specific metrics, monitoring, and reporting, trade shows’ large budgets can seem like a “big black hole” (Stevens 17). Stevens notes that “companies over-spend on the obvious elements—the booth, parties, and premiums—and under-spend where it really counts, on the planning, promotion, data capture, post-show follow-up, and metrics” (17).

**Why people attend trade shows.** It is also helpful to understand why people attend trade shows. The following chart from a CEIR study shows that the main reasons people attend trade shows are to see new products and technology, for personal development, and to improve their job performance (Stevens 16).

<b>Reasons for Attending Trade Show</b>	<b>Percentage of Respondents</b>
See new technology or products	81%
Personal development	79%
Better job performance	76%
Recharge motivation	67%
Networking	66%
Hands-on experience	64%

<b>Reasons for Attending Trade Show</b>	<b>Percentage of Respondents</b>
Meet other users	61%
Learn about regulatory issues	61%
Seminars	60%
See what other large institutions are doing	60%

### 4.3 Selecting Conference Exhibits and Trade Shows

In her article, *The How and Why of Trade Shows*, Karen Klein notes, “finding a trade show is easy. The more difficult questions are which shows to attend and what you should expect to gain by attending.” In *Exhibit Marketing: A Survival Guide for Managers*, Edward Chapman reminds readers, “There are *no* shows where your products are appropriate for the entire audience” (61).

There are several ways to identify potential trade shows or conferences, including:

- Directories, industry association, and trade publications
- Suggestions from staff, partner organizations, and industry contacts
- Discussions with current and potential customers

During the selection process, staff members should consider the budget for the exhibit, past experiences with exhibits, and how specific exhibits fit into marketing plans and organizational goals. Exhibit goals are often in the following categories (Chapman 58):

- Identifying new customers
- Building awareness
- Supporting existing customers
- Establishing the organization’s position
- Obtaining professional development for staff

Other important questions for organizations to consider during the selection process include the following:

- What specific target audience(s) do we want to reach?
- What percentage of projected conference attendees will be members of the designated target audience(s)?
- What do we want to “showcase” at the exhibit?
- What will the show management do to promote the trade show?
- Which of your competitors will exhibit at this trade show?
- How convenient are the dates for the trade show?

The following table, based on *Trade Show Week's* September 2003 Executive Outlook Survey, presents "Show Selection Criteria, Ranked by Importance" (Stevens 66).

<b>Criteria Used in Trade Show Selection</b>	<b>Percentage of Executives Who Ranked Criteria as Important</b>
Lead gathering opportunity	63%
Perceived return on investment or return on opportunity	59%
Attendee demographics	52%
Whether competitors are exhibiting or sponsoring	52%
Attendance numbers, projections	44%
Event management experience, quality	18%
Other	7%

Several authors suggested the idea of visiting conference exhibits before making a final decision about participating in them. By visiting exhibits, it is possible to "get a feel for the activity in the exhibit hall, the buzz, the standards set for the quality of conference sessions, and the profile of attendees" (Stevens 59). Others suggested checking the management's credentials and credit and obtaining references from previous exhibitors.

Stevens mentions several "trouble spots" in trade show selections. She advises against choosing shows "out of habit." Trade shows change, so it is important to monitor them very carefully. Continue selecting trade shows only if they continue to "perform to your standards and support your current sales and marketing objectives." She also advises against selecting trade shows because competitors will be there or because they are in an appealing location (Stevens 61).

#### **4.4 Evaluating Conference Exhibits and Trade Shows**

Most articles and books reviewed for this report suggested evaluating conference exhibits based on the goals and objectives set by the organization. Such evaluations improve the overall effectiveness and cost effectiveness of conference exhibits. In addition, monitoring exhibit-related expenses enables the staff to identify and apply cost-saving strategies.

In the article "When Numbers Mean Very Little," Simon Naudi makes a fundamental point about evaluating conference exhibits. Unlike other communication media, such as advertising, publishing, and broadcasting, the total number of conference participants is not important. It is much more important to know the following:

- How many attendees visited your exhibit booth
- Whether visitors were members of target audiences
- What jobs visitors held and the organizations they represented
- Whether the visitors were interested in your exhibit

Many authors (including Weisgal, author of *Show and Sell*) discussed setting goals for the exhibit. As mentioned previously, the primary goal for trade shows is to meet face to face with as many qualified visitors as possible. “Trade shows are created to facilitate a situation where you and your staff can experience easy, quick, high-speed qualification of prospects and customers” (Weisgal 30).

Various authors described options for setting goals related to the number of qualified visitors who will visit the booth. Weisgal explains that there are several ways to estimate the number of people the staff can actually see and interact with at the booth. Exhibit research has shown that each staff member can speak to 7 to 15 people per hour. Because the exhibit will be open a specific number of hours, it is possible to estimate how many people staff members can interact with during the conference. If desired, exhibitors can also use the data about exhibit costs to calculate the cost per booth visitor or other costs.

**Metrics for measuring nonfinancial results.** Although most authors focus on evaluating exhibits based on financial objectives and gathering leads for sales, a few authors suggest metrics for measuring nonfinancial results. The following activity-based metrics were adapted from the “Setting Specific Metrics around Your Objectives” section of *Trade Show Marketing and Event Marketing* (Stevens 54):

- Goal—Introduce a new product
  - ❖ **Possible metrics:** Number of visitors who come to the booth, demonstrations given, listserv signups, specific materials distributed, number of press mentions, personal meetings planned and held, giveaways distributed (particularly if recipients are qualified), and number of people who would like follow up by staff after the trade show ends.
- Goal—Build awareness
  - ❖ **Possible metrics:** Number of visitors who come to the booth, demonstrations given, listserv signups, personal meetings planned and held, materials distributed, number of people who would like follow up by staff after the trade show ends, and number of press mentions.
- Goal—Research competitors
  - ❖ **Possible metrics:** Number of competitive analyses completed.
- Goal—Conduct market research
  - ❖ **Possible metrics:** Number of interviews or surveys completed and the number of focus groups completed.

Although metric information can be very helpful, the most effective practice is to decide which three to six options are most useful and track them for all exhibits each year.

**Post-conference assessment.** Friedmann, in *Meeting and Event Planning for Dummies*, suggests a different approach to evaluation. She explains that individual conference exhibits are unique and can vary from year to year depending on attendees, economic climate, and other factors. She suggests that exhibit booth staff members should meet immediately after each conference to discuss questions such as the following:

- How did we perform in relation to the planned goals and objectives?
- What can we do to improve our performance during the next exhibit?
- What were our major challenges at the trade show?
- What happened at the exhibit that we did not expect, or for which we were unprepared?
- What areas do we need to address with the exposition (or conference) management?
- Should we exhibit at this trade show again? If no, why not?
- What changes can we make to improve our exhibit?
- Which of our products or services attracted the most attention? Least attention?
- What was the response to our pre-trade show promotion?
- What improvements can we make to future trade show promotions (including pre-show and during the show promotions)?
- How effective was the staff?
- What attention-getting activities did our competitors use? (Friedmann 273)

Many authors offered suggestions for tracking “leads” or capturing information about interactions with booth visitors. The literature suggested the following:

- Use electronic devices (offered for a fee by exhibit managers) that capture booth visitors’ contact information.
- Collect visitors’ business cards.
- Record information (by hand) about booth visitors’ questions, requests, or other actions.

**Giveaways.** Because giveaways can be such an important and expensive draw, it is essential to track the results of their use. One option is to ask recipients about giveaways during follow-up calls or e-mail correspondence. Other options include evaluating giveaways as part of the post-exhibit discussions. Questions to ask include the following: Did giveaways draw specific visitors to the booth? Did the appearance of giveaway items cause passersby to stop at the booth? Did recipients find the giveaways useful?, and Did giveaways present the right image? (Friedmann, “10 Ways to Master the Tradeshow Giveaway Game”).

## 4.5 Boosting the Effectiveness of Conference Exhibit and Trade Show Participation

The literature offered many options for increasing the effectiveness of conference exhibits, but the most frequent and essential recommendation, as previously mentioned in the introduction,

was to consider conferences as part of the organization's overall marketing and communications strategy. Stevens advises organizations to consider business events (such as conference exhibits) a part of "a larger, multi-month program. It is the tip of the iceberg—it is what you see." It also should be considered a part of an "end-to-end marketing campaign" ("Secrets of Success") or comprehensive marketing and communications plan.

The following suggestions for boosting the effectiveness of participation in conferences were repeated most often and are most relevant to this project.

- Preparing **detailed conference exhibit plans** can increase staff efficiency and improve cost effectiveness.
- **Pre- and post-event communications** are extremely valuable tools for attracting members of target audiences to the exhibit booth and building long-term relationships with them.
- Used wisely, **giveaways** can be an important tool for attracting visitors to the booth and helping them remember what they learned about the booth sponsors.
- Carefully **planning encounters** and **training staff** can increase the impact of conference exhibits.

The following sections describe these suggestions in more detail.

#### 4.5.1 Detailed Conference Exhibit Plans

Many authors stressed that it is essential to prepare both annual and individual conference exhibit plans. Each plan should include the goals, objectives, target audiences, promotions, booth details, staffing, handouts and other materials, and plans for interacting with booth visitors. Although authors suggested different plan formats, the following structure, adapted from *Exhibit Marketing: A Survival Guide for Managers* combines the recommendations of several authors (Chapman 8).

- State the goals and objectives for the exhibit as specifically as possible. Be sure to relate them to the organization's overall marketing strategy. Also select the target audience(s) to focus on at the trade show.
- Analyze the trade show, including the demographics of prospective attendees. Analyze the floor plan for the conference and exhibit hall in relation to the booth location.
- Use the conference manager's audience estimates (or registration lists) to estimate the number of specified target audience members who will attend the conference. Review the conference activities planned at times the exhibit hall will be open.
- Determine which products/services will be of interest to the selected target audiences.
- Prepare a list of products/services to be displayed, distributed, or demonstrated at the booth.
- Identify other materials to be used at the trade show, including listserv signup forms and lead information collection forms.

- Identify the print, broadcast, or electronic media outlets likely to be covering the conference or reporting on the results.
- Determine promotional initiatives, including e- or postal mailings, sponsorships, or other activities to be used before, during, and after the trade show.
- Prepare cost estimate or budget.
- List logistical arrangements and exhibit services needed for the exhibit.
- Explain how the exhibit-related activities will be tracked and evaluated.

#### 4.5.2 Pre- and Post-Event Communications

Numerous authors stressed the importance of pre- and post-show communications with prospective booth visitors and media representatives. One reason for pre-show communication is that many conference participants and media representatives decide which exhibits to see before they arrive at conferences.

In the article “The Three Steps to Successful Trade Show Selling,” Test says, “What you do before and after the trade show is just as important as what you do at the show” (28). Anne Barron echoes this in her article *How Companies Market Their Products at Today’s Trade Shows*: “The most important element of a successful promotion today is the combination of pre-, at- and post-show marketing. Most exhibitors fail to do this.”

**Pre-show communications.** Successful pre-show communications reach the people that exhibitors really want to walk over to their exhibits, learn more about offerings, and conduct business. To achieve this, it is essential for planners to understand what their target audience(s) will be looking for at the exhibit (Friedmann *Meeting and Event Planning* 257–8). Exhibit visitors are usually seeking the following from exhibit staff and their organizations:

- **Information.** Visitors want to learn about newest products, services, suggestions, and recommendations, as well as how an exhibitor’s offerings can save them time and money.
- **Direction.** They want guidance, suggestions, and recommendations. They want to know if exhibit staff members know their industry and if their organizations have products or services that will meet their needs.
- **Education.** Visitors want opportunities for personal development, especially options for improving their job performance.
- **Assistance.** They want help with the challenges they face at work. They come to conferences to find people (including booth staff) who can understand, empathize, and help them.
- **Solutions.** Visitors are interested in discussing their work-related problems or challenges. They hope to leave the trade show with concrete answers and details on products and services they really need.

Pre-show communications should let the designated target audiences know that your exhibit will offer information, products, and/or services that are unique and will be of real value to them. The



goal is to have target audiences see the promotional materials and think, “Wow, I’ve got to see that!” (Klein).

Exhibit promotional options are endless. Many authors suggest sending pre-show invitations (by postal or e-mail) to the target audiences they want to visit the exhibit booth. Another option is to use pre-show communications to set up appointments during breaks or to schedule booth visits or demonstrations. Test recommends sending “one mailer to people whom know you and another one with a good “hook” for people who don’t”. Mail and e-mail lists can be drawn from the exhibiting organization’s database, participant lists from trade show managers, and suggestions from staff members and partner organizations.

Studies by the Center for Exhibition Industry Research and the Promotional Products Association International (PPAI) have shown that among the most effective options are “two-part promotions—one part before the show and one part at the show.” Several authors suggested sending post cards because they are inexpensive and the recipients do not have to open them to see the messages (Wentz).

Many authors suggested enticing target audiences with promotional items, creative mailings, or other gifts, and they all emphasized the importance of providing compelling *business* reasons to visit the booth. “The objective of any pre-show mailing should be to get a prospect into your booth for a qualifying dialog. Just getting them there, without getting the opportunity to talk to them, doesn’t accomplish your goal” (Wentz).

Another aspect of pre-show communication is contacting media representatives from relevant industries, especially those who may be reporting on the trade show. It is best to provide media representatives with comprehensive background information about the organization, including details about the products and services to be featured at the trade show and contact information for staff members who can respond to their questions.

**Post-show communications.** There are several options for contacting visitors after the trade show. Instead of handing visitors fliers or brochures that interest them, offer to send materials to them after the trade show. This can be particularly economical if the information is sent by e-mail. Plus, mailing the items decreases the chance they will be thrown away or misplaced. Other options include offering to call visitors after the trade show, sending thank-you notes for visiting the booth, and sending copies of reports, reprints, and other resources based on conversations. If part of the pre-show promotion included a “limited time offer,” send a post-show reminder that the expiration date is coming soon. For invitees who did not visit the booth, another option is to send a message offering to discuss products and services featured at the trade show.

### **4.5.3 Using Giveaways**

Many authors addressed how to use giveaways most productively. They said there can be different gifts for various types of visitors. Giveaways can be used as an incentive to visit the booth or as a “thank you for coming.” Other options include using giveaways as a reward for participating in a demonstration or contest, or as a token of appreciation for providing

“qualifying” information to the staff. Several authors suggested offering two-part items so the target audiences have to come to the booth to obtain the full gift.

In the article “How to Avoid Common Exhibit Marketing Mistakes,” Friedmann says, “The most effective giveaways are targeted, useful, and different.” The most important aspect of any gift is for recipients to “remember who it was from long after the fact.” It is best if recipients cannot get the same gift elsewhere. She also recommends using a “giveaway that will help the audience do its job better.”

The following list of characteristics of effective giveaways is adapted from J.D. Moore’s article “Give Them Something Useful—A Small Business Marketing Tip.”

- They are tools or information that customers will use
- They can be passed along to others, thereby building a marketing effect
- The benefit of the giveaway is obvious
- The giveaway builds a strong mental link to your business
- The giveaway helps the customer buy from you (or use your products/services)

Moore notes, “I personally believe that well-tailored informational products are probably the best giveaway ever.” He further advises that the “Internet is a great medium for giving away information products.” The Internet also makes it easy to offer giveaways to target audiences who do not attend conferences or visit the booth.

An essential, but often overlooked, aspect of using giveaways involves recording who received giveaway items and why. Such information can be used to monitor and evaluate their impact.

#### **4.5.4 Training Staff and Planning Visitor Encounters**

The article *Don’t Blow the Show* stressed the importance of training the staff members so each one will be “knowledgeable about the product or service and be able to answer questions.” This may mean that exhibit staff members need to review materials and practice demonstrations until they are completely comfortable. Several authors suggested holding pre-exhibit meetings to discuss the reasons for exhibiting, review pre-show promotions and booth design, clarify the roles of staff members, and build enthusiasm about the trade show.

Allen, author of *Put the “Show Me” Into Trade Show Exhibiting*, explains that the current evolution on the trade show floor is moving in the direction of “experiential learning.” He explains that this trend “does not stem from a mistrust of marketing materials or the opinions of experts. It’s just that highly educated potential attendees rely more on the opinion they value most—their own.” He goes on to explain that a “natural progression for providing a memorable experience at an exhibitor’s booth is to provide a personalized experience for every visitor.”

Exhibitors can provide active encounters with visitors by offering hands-on training or demonstrations and scheduling face-to-face meetings to discuss how products and services can help visitors overcome work challenges. Other active options include preparing simulations or

case studies that illustrate how products and services can help solve problems faced by target audiences.

In her book *Meeting and Event Planning for Dummies*, Friedmann described the following four stages of exhibit selling (266):

- **Stage 1: Engaging visitors.** In this stage, staff members should welcome visitors, smile, shake hands, and begin to establish rapport. They can do this by asking questions to get visitors' perspectives on their work, industry, and challenges. The questions can focus on how visitors' needs can be met with the exhibitor's products and services.
- **Stage 2: Qualifying prospects.** In this stage, staff members should work on learning about visitors' compelling needs for and interest in their offerings. The staff should also determine if visitors can make decisions related to the offerings for themselves or their organizations. During this stage, it is important for staff members to ask good questions and listen attentively to the answers. If the visitor does not need or want the offerings, the staff member should politely end the conversation.
- **Stage 3: Presenting or demonstrating goods.** Using the information collected in stage 2, staff members should present specific information about or demonstrate how products or services can meet the needs of visitors.
- **Stage 4: Closing the encounter.** During the conversations, staff members should take notes about the questions and topics covered and confirm any follow up contacts (such as calls, visits, or e-mails) they discussed. If giveaways or gifts were promised, the staff member should give them to visitors, shake hands, and thank the visitor for stopping by. After the visitor leaves, the staff member should write down any additional relevant information. (Many authors suggest preparing and using conference-specific lead cards for taking notes and recording details about visits.)

## **5. NLM SIS Conference Exhibit Evaluation Plan**

### **5.1 Introduction**

The NLM SIS Conference Exhibit Evaluation Plan (the Plan) presents a systematic approach to the evaluation of the NLM SIS Conference Exhibit Program. The purpose of the evaluation is to provide NLM SIS with information and feedback on the effectiveness of its exhibit program as currently implemented. This information will allow NLM SIS staff members to determine if they are selecting appropriate conferences to reach target audiences, and if booth visitors find the interactions, offerings, and information satisfactory in meeting their information needs.

This Plan was written by LM Aspen staff members based on their own evaluation expertise and on what was learned through the preliminary stages of this project.

### **5.2 Background**

The following specific recommendations draw on what was learned about the needs of NLM SIS through the environmental scan, as well as tried-and-true methods from experts in the field as found in the literature review conducted for this project.

In preliminary meetings with NLM SIS, it was clear that there is an overarching concern as to whether the program is worthwhile in terms of effort and cost. In other words, are they attending the “right” conferences, are they interacting with the “right” target audience(s), and are these encounters valuable? Overall, this evaluation plan incorporates a system for monitoring and tracking exhibit results that can aid in the decision making and planning processes undertaken by NLM SIS.

The focus of this section is on the evaluation of the existing conference exhibits program. Suggestions from the literature for “boosting exhibit effectiveness” can be found above in section 4.5. If NLM SIS chooses to incorporate these suggestions, the evaluation methods suggested in this plan can be used to measure their impact. The discussion of this plan concludes with some specific recommendations for program enhancements (section 5.7).

### **5.3 Intended Use of Evaluation Results**

First and foremost, the evaluation addresses whether the NLM SIS exhibit program meets its goal of reaching health professionals, minority and underserved populations, and the public. Specifically, NLM SIS intends to use the results of the evaluation to influence decisions pertaining to conference selection. Costs associated with the implementation of the conference exhibit program can be high and NLM SIS also intends to use evaluation results to help streamline conference/exhibit participation in the event that funds are reduced. Furthermore, rather than allow the program to grow in size unbounded, the evaluation seeks a meaningful framework in which to make decisions about which conferences should be retained, deleted, or added. Changing funding levels requires that decisions be justified and supported by available data. In order to use evaluation data most effectively, it is possible that modifications to the existing methods of collecting program information will be needed.

## 5.4 Evaluation Design

There are three major types of program evaluation. A **process-based** evaluation design, rather than a goal-based or outcome-based evaluation, is proposed in this Plan.

Questions pertaining to how the program is actually functioning and what is working best drive what is known as a **process-based evaluation**. The need to justify program decisions or to improve the efficiency of activities associated with the program may underlie the decision to undertake this type of evaluation. Evaluations of that type ask questions about the processes in which individuals engage in carrying out the program. In comparison, **goal-based evaluations** address whether a program is effective in meeting its goals and objectives. This type of evaluation is typically conducted at earlier stages of program implementation. **Outcome-based evaluations** address questions pertaining to benefits to recipients of services, interventions, or information. Collecting these types of data can be costly and requires systematic follow up. Furthermore, to comply with the Paperwork Reduction Act, Office of Management and Budget Clearance is required whenever the Federal Government collects information from more than nine individuals through use of a standardized data collection instrument.

To implement this process evaluation, NLM and ORISE staff members will be asked to provide information pre-conference, during the conference, and post-conference related to the conference itself, the exhibit, and the nature of interactions with visitors. The Plan also offers suggestions for using a visitor feedback card to assess visitor impressions and comments. Because the persons who will be implementing the NLM SIS evaluation are primarily those who plan and staff the exhibit booths, it is not necessary to obtain OMB clearance to carry out this plan.

## 5.5 Defining the Research Questions

A critical component of a sound evaluation is defining the research needs to be addressed by the evaluation design and data collection approach. Clear articulation of evaluation questions helps ensure that reliable and valid answers are produced.

The consultations that have taken place between LM Aspen and NLM SIS (including the key informant discussions during the preliminary phases of this project) engaged NLM SIS staff members in the process of generating the research questions to be used in this evaluation.

Engaging in the activity of drawing explicit links between **what you need to know** and **what information you need to collect** is the first step in developing an evaluation plan. Not only does this process determine how NLM SIS will use the data to meet its needs, it also provides the context in which data limitations are encountered and reconciled. For example, these data will not address questions pertaining to the impact of services provided. Thus, evaluations of this nature preclude the assessment of impact. However, they do address other important questions, such as how the program is functioning overall and which components are most effective.

## 5.6 Evaluation Matrices

This section links the research questions and information/data that will be used to help determine the effectiveness of each conference exhibit and of the exhibit program overall.

As discussed in the environmental scan results, the goals of the program are to:

- Show NLM SIS wares to current and prospective users
- Obtain direct feedback on products and services
- Learn about what current and prospective users are doing and/or need from NLM SIS
- Assist staff members with keeping up with trends in their fields

Objectives include:

- Introduce prospective users to NLM SIS products and services
- Present updates about products and services to current users
- Maintain a presence at meetings and conferences serving target audiences
- Recruit respondents for focus groups or job applicants

For purposes of developing the plan, these objectives have been consolidated into two key objectives for the NLM SIS conference exhibit program:

1. **Booth visitor interactions.** Involves attracting “qualified” people to the booth, introducing prospective users to NLM SIS products and services, getting user feedback on products and services, and learning the needs of users and their expectations of NLM SIS
2. **Conference selection.** Involves selecting conference for exhibits that will enable NLM SIS to maintain a presence at meetings and conferences that serve the appropriate target audiences

The evaluation matrices (tables 1 and 2) are provided to guide the evaluation approach. Each table presents one objective and the associated research questions that represent the components of the program for which data are collected. The evaluation matrix explicitly links the components of the program addressed by the evaluation (the research questions) to the currently available data. Currently available data sources are the NLM External Exhibit System and the ORISE Exhibit Summary Reports.

In the second column of tables 1 and 2, Information Source identifies whether the data already exist in the NLM External Exhibit System (NLM) or the ORISE Exhibit Summary Report (ORISE). The tables also show names of the database field and/or summary report sections. These data are used to assess whether objectives linked to each component are being met.

Currently these data are used to provide a summary of each individual exhibit. As was learned in the environmental scan, there are considerable limitations to the functional utility of the NLM

External Exhibit System. The data cannot be sorted by any of the key variables and report output includes only the generation of conference schedules by fiscal year, conference summaries that include lists of responsible units and up to four target audiences, and conference histories. In order to more effectively evaluate the impact of pre-and post-conference activities on attracting and interacting with target audiences, database functions need to be expanded. (See section 5.7 below for additional recommendations pertaining to database and analytic needs).

The Indicators/Metrics column lists the measures that can help NLM SIS assess whether they are meeting their program objectives. For example, NLM SIS may be interested in tracking and increasing pre-show promotional activities (see table 1). This would entail comparing the “total number of conferences with pre-show promotion” from one fiscal year to the next. Although these analyses may be currently beyond the scope of the NLM SIS system, they are included in the matrix to provide NLM SIS with more information on possible indicators for future use.

The utility of the information in the open-ended data fields (e.g., “Notable feedback” and “Additional comments”) could be improved if staff members were trained to provide information that more specifically addressed the evaluation questions (e.g., characteristics of attendees).

These indicators provide potentially useful data but the assessment of whether success has been obtained on each component is related to the original goals and objectives for each exhibit and for the exhibit program as a whole. For example, based on anticipated target audiences, some conferences may reach multiple groups whereas other conferences may attract only one. Some of the database fields have a quantifiable measure of conference-related variables (e.g., number of booth visitors) whereas others are primarily open-ended text fields that may require additional content analysis to become more useful (e.g., notable feedback).

These evaluation matrices should be reviewed annually to ensure that they continue to meet the needs of the NLM SIS staff in decision making and planning, and to make any necessary modifications.

## **5.7 Recommendations**

The Plan is based primarily on the utilization of existing data to assess if program objectives are being met. This section presents some additional recommendations that NLM SIS may wish to consider. The following suggestions pertain to either the existing reporting formats/database (ORISE Exhibit Summary Report and the NLM External Exhibit System) and how these data may be used more effectively to address research questions as well as other recommendations intended to enhance visitor participation at conference exhibits.

### **5.7.1 Addressing Data and Analytic Issues**

Many data elements are already available to program staff to assess progress (as outlined in tables 1 and 2). However, there are some significant gaps that are addressed below.

**Table 1. Evaluation Matrix—Objective 1**

<b>Objective 1: Research Questions Pertaining to Booth Visitor Interactions</b>	<b>Information Source/ Database Field *</b>	<b>Indicators/Metrics</b>	<b>Suggestions/Recommendations</b>
<i>Pre-conference:</i> What has been done by show sponsors or NLM SIS to promote the exhibit?	<ul style="list-style-type: none"> <li>▪ NLM Field: Pre-show promotion (Y/N)</li> <li>▪ NLM Field: Description</li> </ul>	<ul style="list-style-type: none"> <li>▪ Calculate the total Number of conferences with pre-show promotion</li> <li>▪ Use open-ended text to provide information on the type of promotion (e.g., NLM or show manager, use of registration list, etc.)</li> </ul>	Analyze if pre-show promotion efforts has had an impact on exhibit attendance
<i>Pre-conference:</i> What will we showcase at the exhibit?	<ul style="list-style-type: none"> <li>▪ NLM Field: Which NLM resources were highlighted at the exhibit?</li> </ul>	<ul style="list-style-type: none"> <li>▪ Calculate the total # of resources highlighted</li> <li>▪ Calculate the total Number of each specific resource highlighted</li> </ul>	Provides useful process information
<i>During conference:</i> How many visitors came to the exhibit?	<ul style="list-style-type: none"> <li>▪ NLM Field: Number of attendees</li> <li>▪ NLM Field: Total exhibit visitors</li> <li>▪ ORISE Field: Number of attendees</li> <li>▪ ORISE Field: Total Number of people visiting booth</li> </ul>	<ul style="list-style-type: none"> <li>▪ Calculate the total Number of conference attendees</li> <li>▪ Calculate the total Number of exhibit visitors</li> </ul>	Other potential indicators could be: <ul style="list-style-type: none"> <li>▪ Number of business cards collected</li> <li>▪ Number of names and e-mail addresses collected</li> <li>▪ Number visitors' contact data collected using electronic devices</li> </ul>
<i>During conference:</i> Who were the visitors? (Were they “qualified” members of the target audience?)	<ul style="list-style-type: none"> <li>▪ ORISE Field: Profile of attendees</li> </ul>	<ul style="list-style-type: none"> <li>▪ Calculate the total Number of attendees in each target audience</li> </ul>	<ul style="list-style-type: none"> <li>▪ Compare findings to registration list</li> <li>▪ Consider adding a field to the NLM External Exhibit System to indicate characteristics of “qualified” attendees; collecting this type of “qualifying data” will permit analysis of effectiveness in attracting target audiences</li> </ul>
<i>During conference:</i> What was the nature of the interactions?	<ul style="list-style-type: none"> <li>▪ NLM Field: Total NLM demonstrations</li> <li>▪ NLM Field: Total other system demos</li> <li>▪ ORISE Field: total Number of NLM searches/demonstrations</li> <li>▪ NLM Field: Notable feedback</li> <li>▪ NLM Field: Additional comments</li> </ul>	<ul style="list-style-type: none"> <li>▪ Calculate percentage of booth visitors receiving a demonstration</li> <li>▪ Open-ended text fields also provide information and impressions on interactions</li> </ul>	Develop more close-ended questions to assess and report on additional components of the interactions with booth visitors



**Table 1. Evaluation Matrix—Objective 1 (continued)**

<b>Objective 1: Research Questions Pertaining to Booth Visitor Interactions</b>	<b>Information Source/ Database Field *</b>	<b>Indicators/Metrics</b>	<b>Suggestions/Recommendations</b>
<i>During conference:</i> Which NLM resources (products and services) were featured?	<ul style="list-style-type: none"> <li>▪ NLM Field: Which NLM resources were highlighted at the exhibit?</li> </ul>	<ul style="list-style-type: none"> <li>▪ Calculate the total Number of each specific resource highlighted</li> <li>▪ Calculate the total Number of resources taken by visitors</li> <li>▪ Calculate the total Number of resources requested by visitors</li> </ul>	This is the same field as the one that addresses the pre-conference question of “what will we showcase?” can compare planned to actual to assess whether resources were appropriate. This feedback can be used for future planning
<i>During conference:</i> How were giveaways distributed? Were visitors interested in the promotional items or giveaways?	<ul style="list-style-type: none"> <li>▪ NLM Field: Promotional products quantity</li> </ul>	<ul style="list-style-type: none"> <li>▪ Calculate total Number of products given away</li> </ul>	Develop plan to assess whether the giveaways or promotional materials brought visitors to booth
<i>During conference:</i> Were visitors satisfied with the NLM SIS offerings?	<ul style="list-style-type: none"> <li>▪ NLM Field: Notable feedback</li> <li>▪ NLM Field: Additional comments</li> </ul>	<ul style="list-style-type: none"> <li>▪ Open-ended text fields may include relevant information</li> </ul>	Consider developing a feedback card. Such a feedback card can be used to collect up to 9 responses per conference.
<i>During conference:</i> Were there any other conference factors potentially relevant to participation?	<ul style="list-style-type: none"> <li>▪ NLM Field: Booth location description</li> <li>▪ NLM Field: Notable feedback</li> <li>▪ NLM Field: Additional comments</li> <li>▪ ORISE: Number of exhibitors</li> </ul>	<ul style="list-style-type: none"> <li>▪ Open-ended text fields may include relevant information</li> </ul>	Consider adding fields and/or tracking the following to assess impact on visitor participation, such as the use of conference sponsorship, ad placement, other conference participation (poster, presentation), pre-mailers, etc.
<i>Post-conference:</i> Will visitors rely on NLM SIS products and services in the future?	None	<ul style="list-style-type: none"> <li>▪ Calculate Number of follow up calls conducted and the purpose of the calls</li> <li>▪ Calculate Number of mailings and nature of requests</li> <li>▪ Indicate if there was media coverage</li> </ul>	

\* “NLM” represents the NLM External Exhibit System; “ORISE” refers to the ORISE Exhibit Summary Report

**Table 2. Evaluation Matrix—Objective 2**

<b>Objective 2: Research Questions Pertaining to Conference Selection</b>	<b>Information Source and/or Database Field</b>	<b>Metric</b>	<b>Comment</b>
What percentage of projected conference attendees will be members of the designated target audience(s)?	None	Compare goals for reaching target audiences to data on total number of visitors and visitor profile	Information maps to the objectives for reaching target audiences, conferences attended, and success in reaching target audiences
How convenient are the show dates? Can appropriate staff attend?	<ul style="list-style-type: none"> <li>▪ Consider location and dates of conference</li> <li>▪ NLM Field: FTE staffing exhibit</li> </ul>	None	
Post-conference follow up and debriefing (assessment of booth staff regarding success of exhibit and value of continued participation)	<ul style="list-style-type: none"> <li>▪ NLM Field: Exhibit again? (Y/N)</li> <li>▪ NLM Field: Rationale</li> </ul>	<ul style="list-style-type: none"> <li>▪ Calculate total Number of “yes” responses</li> <li>▪ Examine open-ended text fields for rationale for recommendation not to exhibit to see if there are factors or issues that can be overcome</li> </ul>	Information should be utilized in annual planning meetings and combined with periodic staff debriefing sessions
Cost information	<ul style="list-style-type: none"> <li>▪ NLM Field: Booth space cost</li> <li>▪ NLM Field: Other booth costs</li> <li>▪ NLM Field: Drayage/handling costs</li> <li>▪ NLM Field: Other cost amount</li> <li>▪ NLM Field: Internet connection cost</li> <li>▪ NLM Field: Shipping cost</li> <li>▪ NLM Field: Total travel cost</li> <li>▪ NLM Field: Other cost description (text)</li> </ul>	<ul style="list-style-type: none"> <li>▪ Calculate total cost</li> <li>▪ Examine cost relative to reaching target audience</li> </ul>	<ul style="list-style-type: none"> <li>▪ Provides useful process information</li> <li>▪ Useful when determining if tailored materials should be developed for particular target audiences at conferences</li> <li>▪ Data provide statistics on program costs and can be used to assess the value of exhibits</li> </ul>
Other information pertaining to conference selection and value of conference participation (e.g., recruiting, professional development)	None	None	In particular, what are the benefits to staff? Benefits may include professional development or networking opportunities. Such information could be collected by expanding current report formats or conducting periodic debriefing to assess whether/how conferences meet professional development needs

\* “NLM” represents the NLM External Exhibit System; “ORISE” refers to the ORISE Exhibit Summary Report

**Reaching target audiences.** Because NLM SIS is interested in reducing health disparities among minorities, it is of utmost importance that they assess effectiveness in reaching target audiences through the costly and time-intensive exhibit program. It appears that only the ORISE Exhibit Summary Reports provide information regarding audience profile. This prohibits a systematic and rigorous assessment of whether the exhibit program is reaching the intended groups of people. Additional fields may need to be added to the database or staff may require further training to ensure that this information is collected at each conference exhibit (see suggestion above regarding open-ended text fields).

**Nature of the interactions.** Additional information about the nature of the interactions with booth visitors can also be assessed above and beyond number of demonstrations, and so on. However, to do so would require constant monitoring that may impact the quality of the exchanges and is likely to be somewhat inaccurate. For example, staff members could track the following kinds of information to supplement the visitor count and the number of demonstrations:

- Number of persons who pick up information, but do not engage staff members in conversation
- Number of persons who engage staff members in conversation and/or ask questions (record content if possible)
- Number of persons who provide verbal feedback of a positive nature (record content if possible)
- Number of persons who provide verbal feedback of a negative nature (record content if possible)

**Additional staff feedback.** Although staff members provide reports that are specific to conferences, they may not have the opportunity to provide a more global perspective on factors that facilitate or impede effective exhibiting. Periodic (at least quarterly) debriefing sessions with booth staff will help NLM SIS interpret conference reports and may also inform the following:

- Overall, how did we perform in relation to the planned goals and objectives?
- What can we do to improve our performance during the next fiscal year?
- What are our major challenges?
- What areas do we need to address with the exposition (or conference) management?
- What changes can we make to improve our exhibits?
- Overall, which of our products or services attract the most attention? Least attention?
- Overall, how effective is pre-show promotion?
- What improvements can we make to future at-show promotions?
- How can staff performance be improved?

- How effective overall are the giveaways? (e.g., do they draw specific visitors to the booth, are they eye-catching, do they present the right image)

**Conducting aggregate analyses.** The current system of data collection pertaining to the exhibit program is primarily on a case-by-case basis. Some of the objectives of the NLM SIS conference exhibit program may be better assessed through aggregate-level analyses. For example, aggregate-level analyses could address the following kinds of questions:

- How many of our target audience members are we reaching? (Total number of booth visitors by profile characteristics)
- What activities have an impact on the number and types of visitor participation? (Total number of booth visitors by pre-conference and/or conference activity)
- What activities have an impact on the nature of interactions between booth staff and visitors? (Nature of interaction results by pre-conference and/or conference activity)

These results will enable NLM SIS to develop a more defensible response to questions such as whether target audiences are reached effectively, what areas are in need of improvement, and whether current practices are meeting program goals and objectives.

### 5.7.2 Boosting Participation

The findings of the literature review show that there are a number of ways that NLM SIS can increase the effectiveness of the entire exhibit program.

**Overall marketing and communications strategy.** The literature review revealed that the most successful exhibit programs are part of the organization's overall multifaceted marketing and communications strategy. Although conference exhibits may be the most expensive parts of the program, comprehensive marketing strategies achieve the goals of building awareness, identifying new customers, supporting existing customers, and establishing the organization's identity in the minds of customers. As discussed above, exhibits ("trade shows") have the potential to incorporate many marketing communications elements including market research, public relations, advertising, sales, and electronic media.

Furthermore, though NLM SIS already has some of the essential elements for a comprehensive marketing strategy, such as selected target audiences, the environmental scan revealed that there are no ongoing marketing and communications initiatives. Similarly NLM SIS already has some communication tools such as listservs, brochures, giveaways, and fact sheets, but no systematic plans for using them.

**Pre-conference activities.** One suggestion is to start sending pre-conference communications via e-mail or postal mail to entice both existing and new customers to the booth. NLM SIS could offer specialized information and/or giveaways to encourage qualified target audiences to visit the booth, use coding or tracking options to measure the results of mailings, and plan options for people who receive mailings, but do not attend the conference to communicate with staff, receive targeted information, and perhaps "win" gifts.

**Promotional options.** Consider promotional options offered by conference managers, such as ads in the program book, inserts into participant bags, and so on. Such promotional options are most effective if they focus on specific audiences and address specific, compelling, business-related needs. Another technique for attracting attention is to prepare and send conference exhibit-related background materials to appropriate media representatives and invite them to visit the booth. Carefully track the number of calls and items published as a result of the effort.

Re-examine the options for interacting with visitors to increase booth staff's ability to provide individual visitors with customized demonstrations of NLM SIS products/services or hands-on training. Consider options for future contacts with booth visitors by staff. Future contacts may include building partnerships or helping intermediaries convey information about NLM products/services.

Contacting visitors after seeing them at conference exhibits will remind them about NLM SIS after they return to work and are able to use its resources. It is always a good idea for booth staff to walk around the exhibit hall, meet other exhibitors, collect materials, and take note of any new and innovative ideas. During debriefing discussions, talk about the booths, activities, and materials offered by other exhibitors.

Start collecting contact information (with permission) from booth visitors by collecting business cards, writing down information, or using electronic devices provided by conference managers (if available). This process can provide valuable data for use in planning. By adding interested visitors to a contact database, staff members can easily notify them about upcoming conferences and new products/services. Such communications from NLM SIS staff will help build awareness among audiences and solidify awareness of NLM SIS as a source of valuable, business-oriented information.

**Additional suggestions.** Below are some additional possibilities suggested by the literature (and LM Aspen staff). NLM SIS is currently engaged in many of these activities, but they will be more effective if they are better integrated into an overall approach.

- State goals and objectives for the exhibit as specifically as possible. (Be sure to relate them to an overall marketing strategy.) Use conference manager's audience estimates (or registration lists) to estimate the number of members of the specified target audience who will attend the conference. Then base goals and objectives on the target audience estimates.
- Analyze trade shows, including the demographics of prospective attendees as part of the conference selection process. Be sure to designate the audience characteristics that will be used to define booth visitors as "qualified" leads.
- Prepare a list of products/services to be displayed, distributed, or demonstrated at the booth and plan specific ways to promote them.
- Include print, broadcast, or electronic media outlets that likely to be covering the conference in promotional plans. Consider promotional initiatives, including e-mail or postal mailings, sponsorships, or other activities to be used before, during and after the trade show.
- Specify techniques for tracking and evaluating exhibit-related activities in the planning processes.

## Summary

This plan offers techniques for evaluating the conference exhibit program, as well as a variety of research-based ideas for improving the effectiveness and boosting the impact of the entire program. The evaluation plan was designed so that NLM SIS can begin the evaluation process immediately using the data currently collected to get baseline information. Then, if NLM SIS staff members decide to implement some or all of the suggestions in the plan, they can use the same or additional data collection options to evaluate the results of changes or improvements to the program. The plan is flexible so that NLM SIS staff can select some or all of the evaluation options presented. Likewise, staff members can choose from the recommendations for selecting, preparing for, participating in, promoting, and communicating with target audiences who attend the conference or just learn about it afterwards.

## Appendix A. Key Informant Discussion Guides

### NLM Discussion Guide March 14, 2006

#### Background and Introductions

Ann Poritzky – I work on the NLM contract in many ways. Marti and Jeanne know me best through Aspen's work on posters.

Shinta Hernandez – Works with the Research Department. You have met her before at the first meeting. She will help with our discussion by posting some information on the white board/flip chart and keeping me on track with our discussion today.

Nora Cook – Relatively new to the Research Department, but some of you know her from her previous position as assistant to Ruthann Bates. She will be taking notes on a laptop.

Under a contract with NLM, Lockheed Martin Aspen Systems is reviewing the current operation of the NLM Conference Exhibit Program. The result will be the development of an evaluation plan, which will help SIS evaluate the impact and effectiveness of its conference exhibits and guide future direction of the program.

Our intent is to learn about what is currently taking place and to identify evaluation goals for the program. For example, we would like to learn more about how the NLM Web-based Exhibit System is being used and whether you find it helpful, as well as factors that play a role in how conferences are selected, exhibits are developed and staffed, and how NLM currently evaluates exhibits' effectiveness.

We have prepared a set of questions to guide our discussion and have a handout that provides an outline of the topics we would like to cover.

We only have an hour together, and if we touch on topics that are better addressed by another person, or for which documentation exists, let us know so that we can follow up afterwards.

We plan to work with Cindy Love to coordinate any followup with you, other staff, etc.

*[Get permission to record; review any other logistical topics.]*

#### Goals, Objectives and Target Audience

- What are the goals of the NLM SIS conference/exhibit program? (*Shinta post responses*)
  - Do they differ by target audience or between health and toxicology resources?
  - Are they written? *[If yes, request a copy.]*

- What are some of NLM's strategic objectives for its exhibits program?
  - *[Probe: message conveyance—new health information, awareness building, recognition/support of specific groups]*
- Who are your target audiences? (Shinta post responses) (We may hand out NLM database list of target audiences at this point.)
  - How do the goals/objectives (mentioned before) differ when you are working with different target audiences?
  - At our initial meeting, there was some discussion about target audiences that are particularly difficult to reach. Who are they? What does NLM do to reach these audiences?
- What specific information and/or messages (about NLM, products, or services) are NLM SIS staff members trying to convey via conference exhibits?

### **Selection Process**

Our staff used the NLM conference database to generate information about the current NLM SIS conference exhibit program.

*[Handout of list of 2005 conferences from NLM conference database]*

- Does this list look accurate or complete?
- What is the number of conferences at which NLM SIS exhibits per year?
- What is the number of new NLM SIS conferences per year?
- How are decisions made about adding/deleting conferences?
  - What criteria or conference exhibit characteristics are used to guide decision making?

*[Probe: For example, based on conference/exhibit details or are potential exhibit opportunities analyzed as part of a mix of communication initiatives to reach the targeted groups?]*

- Do any other exhibit characteristics influence the conferences selected? (*Shinta post responses*)

For example, types of participants, size of conference, conference topic, location, history of exhibiting at conference? Of these, which one(s) do you consider most important?

*[Probe: For example, if a staff member is presenting a poster session or workshop at a conference, does that have an impact on the decision about exhibiting at the conference?]*

- To what extent do costs (such as travel, etc.) influence decisions about participating in conferences?

### **Conference Activities**

We are going to talk about conference activities that occur before, during, and after conferences.



### ***Preparation and Staffing – Before the Conference***

- What is the nature of the relationship between NLM and ORISE?
- How does NLM SIS and ORISE staff prepare for conferences?
  - Preparation may include exhibit design details, giveaways, handouts, staffing, and promotion.
- How does NLM SIS determine how many staff will work at the exhibit and their schedules?
- How does NLM SIS prepare or train conference exhibit staff to work at exhibits?

### ***Conference-Related Promotion – Before the Conference***

- Have you or the SIS staff conducted any conference-related promotional activities?
  - If no, are there any conference-related promotional activities that you have thought about or considered?
  - If yes, what conference exhibit was it related to and what was done (e.g., bag stuffers, ads in program books, hospitality options, vendor workshops, etc.)? What is your impression of the effectiveness of these activities?
- Overall, how effective do you perceive these kinds of promotional activities to be when used by other organizations?

### ***Giveaways – During the Conference***

- What giveaways have been used at various conferences? For particular audiences?
- How were these giveaways selected? How do you think conference attendees have responded to the various giveaways?
- Have any giveaways elicited particularly positive or negative responses from conference participants?
- What, if any, interactive strategies/techniques have NLM SIS used to convey information at conference exhibits? (Options may include personal meetings with conference attendees, demonstrations, hands-on training, giveaways, etc.)

### **Conference Exhibit Monitoring, Tracking and Reporting**

#### ***Use of NLM Conference Database – After the Conference***

- Who enters the SIS data in the database? Who uses the data and how?
  - Is the database used to enter information or generate reports?
- Aside from the information in the NLM database, how does NLM SIS track and/or measure the results of conference participation?
- What, if any, additional information do you think NLM needs to track and collect related to conferences?

- What conference-related budget items does NLM SIS track or monitor? How is that information collected and reported?

### **Closing/Additional Questions**

We thank you for your time in assisting us with this effort to understand more about the NLM Conference Exhibit Program.

- May we contact you with follow up questions if necessary?
- As we discussed during this past hour, we would like to receive the following information from you. *[State the list of items if any.]*

## **ORISE Discussion Guide** **March 28, 2006**

### **Background and Introductions**

Ann Poritzky – I work on the NLM contract in many ways, including producing posters and giveaway items.

Nora Cook – Nora is a member of the Research Division. She will be taking notes during our discussion. (We are also tape recording this discussion to help with preparing our notes.)

Under a contract with NLM, Lockheed Martin Aspen Systems is reviewing the current operation of the NLM Conference Exhibit Program. The result will be the development of an evaluation plan, which will help SIS evaluate the impact and effectiveness of its conference exhibits and guide future direction of the program.

Our intent is to learn about the current conference exhibit program, including the ORISE work. We will use this information to guide the evaluation plan. We have already conducted an interview with NLM staff to get their perspectives. Today we want to learn more about how ORISE is involved in the conference program.

### **Preparation**

- What is ORISE's role with respect to planning and implementing NLM conference exhibits?
- How does NLM SIS and ORISE staff prepare for conferences? (Preparation may include exhibit design details, giveaways, handouts, staffing, and promotion, etc.)
- How do ORISE and/or NLM determine how many staff will work at the exhibit and their schedules?
- How do ORISE and/or NLM prepare or train conference exhibit staff to work at exhibits?

### **Information/Messages**

- Which target audiences do conference exhibits reach most effectively? Least effectively?
- What specific information/messages (about NLM, products, or services) does NLM SIS staff try to convey via conference exhibits?
- What strategies or techniques do ORISE and NLM staff use to convey information at conference exhibits? (Options may include personal meetings with conference attendees, demonstrations, hands-on training, giveaways, etc.) Were any strategies or techniques more effective than others? Were any ineffective?
- We know NLM uses conference exhibit giveaways. Do you or other ORISE staff get involved in selecting giveaways? If so, what do you do?
  - How do you think conference attendees have responded to the various giveaways?

- Have any giveaways elicited particularly positive or negative responses from conference participants? If so, please describe.

### **Conference Exhibit Monitoring, Tracking, and Reporting**

- How does ORISE track and report the results of conference exhibits? Do you also track planning activities in any way?
  - Do you or your staff add information to the NLM conference database?
- What, if any, conference-related budget items does ORISE track or monitor? How is that information collected and reported?
- Aside from the information in the NLM database, how else does ORISE or NLM SIS track and/or measure the results of conference participation?
- In your opinion, what information would NLM find most useful to track to help support decisions about participating in conference exhibits? Why? Currently, is this information collected?

## **Appendix B. List of NLM SIS Materials Collected**

### **Documents from the National Library of Medicine (NLM)**

*(from Cindy Love)*

- Logo Products Order Form
- OOSP Products and Services Matrix

### **Items from the Oak Ridge Institute for Science and Education (ORISE)**

*(from Rose Foster)*

- Report:
  - FY 2005 Exhibit Support to the Library of Medicine
- Flyers:
  - HIV/AIDS Prevention Websites for Communities of Color
  - How to Find Reliable HIV/AIDS Treatment Information on the Internet
- Rolodex Cards:
  - HIV/AIDS Information
  - Toxicology and Environmental Health
  - Consumer Health Information
- NLM Brochures:
  - Is Your Environment Hazardous to Your Health?
  - Minority Health Resources: Empowering Minority Communities with Health Information
- Giveaways
  - Paper clip holder
  - Letter opener
  - Mini flashlight
  - Calculator
  - NLM tradeshow plastic tote bag

## Appendix C. List of Target Audiences

<b>NLM SIS Target Audiences</b>
▪ Advocates
▪ Allied health professionals, including mental health professionals
▪ Biotechnologists/Geneticists
▪ Chemists/Toxicologists
▪ College and University Staff
▪ Community-Based Organization leaders and staff (including HIV/AIDS organizations)
▪ Consumers (including senior citizens)
▪ Corporate and business representatives (including pharmaceutical company and association staff)
▪ Educators (high school, college, professional school, including medical, nursing, dental, pharmaceutical etc.)
▪ Federal and state government staff
▪ First Responders (including fire fighters)
▪ Health administrators
▪ Health care providers (HCP), including physicians
▪ Industrial hygienists
▪ Journalists and media representatives
▪ Librarians and Information Specialists
▪ Medical specialists (infectious diseases, HIV/AIDS, pediatrics, etc.)
▪ Members of racial and ethnic minority groups (including African Americans, Asian Americans, American Indians, and Hispanics/Latinos)
▪ Nurses and nurse practitioners
▪ Other -- Health
▪ Other -- Not specified
▪ Other -- Toxicology/Environmental Health
▪ Patients, family members, and friends
▪ People living with HIV/AIDS (PWA)
▪ Pharmacists
▪ Public Health Professionals
▪ Researchers and laboratory staff
▪ Scientists
▪ Safety Officers
▪ Students (high school, college, professional school, including medical, nursing, dental, pharmaceutical etc.)

## Appendix D. FY2005 Conferences and Target Audiences

Meeting Details	Organization Name	Primary Target Audiences	Primary Special Populations
<b>United States Conference on AIDS</b> 10/21/04 Philadelphia, PA	National Minority AIDS Council (NMAC)	CBO Representatives, Advocates, Allied Health Professionals, Patients, Physicians, Pharmacists, Public Health	PWAs
<b>Society for Advancement of Chicanos &amp; Native Americans in Science</b> 10/22/04 Austin, TX	Society for Advancement of Chicanos & Native Americans in Science (SACNAS)	Educators, Students	American Indians, Hispanics/Latinos
<b>Annual Conference</b> 10/22/04 Pittsburgh, PA	Society for Environmental Journalists (SEJ)	Journalists	
<b>Annual Meeting</b> 11/8/04 Palm Springs, CA	American College of Toxicology (ACT)	Educators, Chemists/Toxicologists, Researchers, Students	
<b>European Occupational Health and Safety (EurOhs) 2004 Conference</b> 11/10/04 London, England	Angel Business Communications Ltd. (EurOhs)	Chemists/Toxicologists, Safety Officers, Industrial Hygienists	
<b>2004 Emergency Preparedness &amp; Prevention Conference</b> 12/5/04 Philadelphia, PA	General Physics Corporation	First Responders	
<b>National Advanced Practice Conference</b> 12/5/04 Boston, MA	Nurse Practitioner Associates for Continuing Education (NAPC)	Nurses, Clinicians, HCPs , Educators, Students, Allied Health Professionals	
<b>Annual Meeting</b> 2/18/05 Washington, DC	American Association for the Advancement of Science (AAAS)	Educators, Physicians, Public Health, Biotechnologists/Geneticists, Students	
<b>Annual Meeting</b> 3/7/05 New Orleans, LA	Society of Toxicology (SOT)	Chemists/Toxicologists, Pharmacists, Laboratory Staff, University Staff, Private Consultants, Government Agency Staff	
<b>Annual Symposium on Career Opportunities in Biomedical Sciences</b> 3/23/05 Anaheim, CA	Minority Health Professions Foundation (BS)	Educators, Students	African-Americans, Minority Students

Meeting Details	Organization Name	Primary Target Audiences	Primary Special Populations
<b>Annual Conference</b> 3/24/05 St. Louis, MO	Student National Medical Association (SNMA)	Physicians, Students, Educators	African-Americans, Minority Students
<b>National Science Teachers Association</b> 3/31/05 Dallas, TX	National Science Teachers Association (NSTA)	Educators	
<b>9th Annual Conference: Medical Practice for the 21st Century</b> 3/31/05 Los Angeles, CA	National Hispanic Medical Association (NHMA)	Allied Health Professionals, Health Administrators, Nurses, Physicians, Public Health, Students	Hispanics/Latinos
<b>National AIDS Update Conference</b> 4/11/05 Oakland, CA	American Foundation for AIDS Research (NAUC)	Advocates, Allied Health Professionals, Health Administrators, CBO Representatives	PWAs
<b>American Occupational Health Conference</b> 5/1/05 Washington DC	American Association of Occupational Health Nurses (AOHC)	Allied Health Professionals, Health Administrators, Nurses, Physicians, Pharmacists	
<b>Annual Conference</b> 5/3/05 Green Bay, WI	National Tribal Environmental Council (NTEC)	Physicians	American Indians
<b>American Industrial Hygiene Conference and Exhibition</b> 5/23/05 Anaheim, CA	American Industrial Hygiene Association (AIHCE)	Chemists/Toxicologists, Industrial Hygienists	
<b>International Hazardous Materials Response Teams Conference</b> 6/2/05 Hunt Valley, MD	International Association of Fire Chiefs (IHMRT)	First Responders, Firefighters	
<b>American College Health Association</b> 6/2/05 San Diego, CA	American College Health Association (ACHA)	Nurse Practitioners, Allied Health Professionals, Physicians, Nurses, Health Administrators, College Professors	
<b>Annual Meeting</b> 6/5/05 Toronto, Canada	Special Libraries Association (SLA)	Librarians, Information Specialists	
<b>National HIV Prevention Conference</b> 6/12/05 Atlanta, GA	National Center for HIV, STD and TB Prevention (NHPC)	Physicians, HIV/AIDS Organization Representatives, Pharmaceutical Company Staff, Foundation Staff, Corporation Staff, Federal and State Agency Staff	



<b>Meeting Details</b>	<b>Organization Name</b>	<b>Primary Target Audiences</b>	<b>Primary Special Populations</b>
<b>Annual Conference</b> 6/19/05 Washington, DC	Society of Toxicologic Pathology (STP)	Chemists/Toxicologists	
<b>Annual Conference</b> 6/19/05 Fort Lauderdale, FL	American Academy of Nurse Practitioners (AANP)	Nurses, Nurse Practitioners	
<b>Annual Conference</b> 6/26/05 Providence, RI	National Environmental Health Association (NEHA)	Physicians	
<b>Annual Conference</b> 6/27/05 St. Petersburg Beach, FL	Teratology Society (TX)	Biotechnologists/Geneticists, Chemists/Toxicologists, Researchers (in the fields of Pediatrics, Anatomy, Epidemiology, Toxicology, and Genetics), Students, Physicians, Industrial Hygienists	
<b>NCLR Annual Conference</b> 7/16/05 Philadelphia, PA	National Council of La Raza (NCLR)	CBO Leaders; Officials from Corporate, Philanthropic, and Academic Organizations; Senior Citizens; Students	Hispanics/Latinos
<b>30th Annual Conference</b> 7/20/05 Orlando, FL	National Association of Hispanic Nurses (NAHN)	Advocates, Educators, Researchers, Nurses, Students, Physicians	Hispanics/Latinos
<b>Annual Conference</b> 7/21/05 Chicago, IL	National Black Nurses Association (NBNA)	Allied Health Professionals, Nurses, Student Nurses, Recruiters (employment)	African Americans
<b>Annual Conference</b> 7/24/05 New York, NY	National Medical Association (NMA)	Physicians, Pharmacists, HCPs	African-Americans
<b>34th Annual Conference</b> 8/3/05 Washington, DC	Association of American Indian Physicians (AAIP)	Allied Health Professionals, Physicians, Students, Pharmacists	American Indians
<b>2005 Fire Rescue International Conference</b> 8/12/05 Denver, CO	International Association of Fire Chiefs	First Responders, Firefighters	
<b>Regional Meeting: 10th Annual Health Summit of Minority Communities</b> 8/25/05 Nashville, TN	Tennessee Black Health Care Commission (HSMC)	Advocates, Allied Health Professionals, Students, HCPs, CBO Representatives, Mental Health Professionals	African-Americans
<b>Annual Meeting</b> 8/29/05 Washington, DC	American Chemical Society (ACS)	Chemists/Toxicologists, Educators	

Meeting Details	Organization Name	Primary Target Audiences	Primary Special Populations
<b>North American Congress of Clinical Toxicology</b> 9/11/05 Orlando, FL	American Academy of Clinical Toxicology (NACCT)	Chemists/Toxicologists	
<b>42nd Congress of The European Societies of Toxicology</b> 9/11/05 Cracow, Poland	The Polish Society of Toxicology & The Nofer Inst. of Occupational Medicine (Eurotox 2005)	Chemists/Toxicologists	
<b>Treatment &amp; Management of HIV Infection in the U.S. Conference</b> 9/15/05 Atlanta, GA	U.S. Department of Health and Human Services (TMHI)	Health Administrators, Physicians, HIV/AIDS Specialists	PWAs
<b>Annual Conference</b> 9/19/05 Miami, FL	National Association of Community Health Centers (NACHC)	Health Administrators, HCPs, Physicians	
<b>US Conference on AIDS</b> 9/29/05 Houston, TX	National Minority AIDS Council (NMAC)	CBO Representatives, Advocates, Allied Health Professionals, Physicians, Pharmacists, Public Health	PWAs

Legend:

PWA = People Living with AIDS  
 CBO = Community-based organizations  
 HCP = Health Care Providers

## Appendix E. List of Collateral Materials and Promotional Items

NLM SIS Products/Services	Collateral Materials	Promotional Items
NLM (general)		Playing Cards, Pedometer, Calculator (2 styles), Paper Clip Holder, Baseball Cap, Tape Measure, Drink Coasters, Mini Flashlight, and Travel Mug, Coffee Mug, Yellow Tote Bag
AIDSinfo and NLM AIDS Web sites	AIDSinfo brochure, rolodex card	Post-it notes and pens
AIDSinfo, NLM AIDS, MedlinePlus, and PubMed Web sites		Travel mug
All SIS products/services	Capabilities brochures (big bookmarks)	
American Indian Health Web site	Brochure	Magnet
Arctic Health Web site	Brochure	
Dirline database	Flier	
Haz-Map database	Brochure	
Health Hotlines		
Household Products Web Site	Flier	
Medline/PubMed		Pen
MedlinePlus		Pen, tote bag (two styles, one cloth and one plastic), Envelope opener
NLM AIDS Web site		Pen
Tox Town Web Site	Brochure and mini-poster	Mugs
Toxicology and Environmental Health Web Site	Rolodex card and brochures: <i>Is Your Environment Hazardous to Your Health?</i> and <i>Minority Health Resources: Empowering Minority Communities With Health Information</i>	Toxie cats, plastic badge holder necklace, pen
WISER Web Site		WISER dogs

## Appendix F. Sample Conference Exhibit Report from ORISE

May 11, 2005  
Carolyn Doty and Wilma Templin-Branner  
NLM/ORISE

### Exhibit Specifics

19<sup>th</sup> Symposium on Career Opportunities in Biomedical Sciences  
Anaheim, California  
March 23-25, 2005

Staff: Cynthia Gaines of NLM and Carolyn Doty and Wilma Templin-Branner of ORISE

Number of attendees: 1,205  
Profile of attendees: 997 high school and undergraduate students pursuing health professions  
and 208 general attendees

Number of exhibitors: 40  
Total exhibit hours: 13 hours (including 1 hour for setup and 30 minutes for teardown)  
Exhibit type: Small consumer health tabletop display

Total number of booth visitors: 475  
Total number of NLM searches/demonstrations: 45

### Exhibit Summary

The Minority Health Professions Foundation and the Association of Minority Health Professions Schools sponsored the symposium. The NLM exhibit consisted of a small tabletop display. The exhibit had heavy booth traffic this year; approximately 39% of meeting attendees visited the booth. The first day of the symposium focused primarily on high school students; it was the busiest day, with more than 350 visitors. On the second day, exhibits were open for only half of the day and visitors to the booth were mostly undergraduate students.

Students attending this year's conference were predominantly African-American; a few were of Hispanic, Asian, and Indian origin. Most of the students who visited the booth were not familiar with NLM and its resources but were very interested in learning about the databases. The staff presented overviews of MedlinePlus®, MEDLINE®/PubMed®, TOXLINE®, Visible Human Project®, HSDB®, Household Products, Tox Town, and ChemIDplus. Students were very interested in searching for journal articles in MEDLINE/PubMed and obtaining general information from MedlinePlus for preparing their research papers and projects; booth staff members stressed the importance of learning to use these databases efficiently as soon as possible. Most of the demonstrations were conducted on these two databases, searching topics the students were currently studying as well as topics in the area of minority health. Examples of

search topics include diabetes, kidney disease, human genetics, bipolar disorder, tuberculosis, asbestos, physical therapy, radiation, pregnancy, Alzheimer's, and steroids. A significant number of students were interested in becoming pharmacists and the staff demonstrated the TOXNET® databases and discussed their applicability in the field of pharmacology.

Students were very interested in the Visible Human Project and were captivated by its history and features. Many students, particularly the young women, were interested in the *Changing the Face of Medicine* exhibit and a large number of the accompanying CDs were handed out. Several attendees inquired about NLM's outreach activities for high school students as well as internships, training, and fellowship opportunities; Cynthia Gaines provided this information.

### **Recommendations**

We did not provide a workshop at the symposium this year because of a change in the program format. However, the conference coordinator indicated the format may change next year and may allow for a workshop. If so, NLM should consider conducting two sessions—one for high school students and one for undergraduates. Also, due to high booth traffic, we recommend the use of two computers for demonstrations next year. Another recommendation is to double the number of MedlinePlus brochures and increase the number of all other brochures by 25%.

# Appendix G. Screen Shots of Conference Information from the NLM External Exhibit System

The screenshot shows a web browser window titled "NLM's Web Based Exhibit System -- View Exhibit Report - Microsoft Internet Explorer". The address bar shows the URL: <http://wwwcf.nlm.nih.gov/webexhibits/viewExhNew.cfm?RID=594&mid=399&fsyr=2005&calyear=2005>. The main content area is titled "View Exhibit Report -- Part I" and displays the following information:

- Organization Name:** National Council of La Raza
- Meeting Name:** National Council of La Raza
- Location:** Philadelphia, Pennsylvania
- Date:** 07/16/2005 - 07/19/2005
- Booth Size:** 8x10
- Booth Structure:** Tabletop
- Number of Attendees:** 18000
- Total Exhibit Visitors:** 165
- Total Exhibit Hours:** 15.00
- Total NLM Demos:** 5
- Number of Other Exhibits:** 234
- Total Other System Demos:** 0
- FTE staffing exhibit:** 5.00
- Exhibit Again:** checked
- Exhibit Again Rationale:** In 2006 a booth should be reserved in the Latino Expo USA, not the Health Fair. (1000 character limit)
- Booth Location Description:** Booth space was reserved in the Health Fair exhibit area instead of in the Latino Expo USA as has been the practice in the past 3 years. The booth was located at the back of the exhibit hall (1000 character limit)
- Exhibit Staff Names:** Lucie Chen, George Franklin and David Nash of NLM,, Peggy Falls of NN/LM Middle Atlantic Region and Wilma Templin-Braner of ORISE (1000 character limit)
- Notable Feedback:**
- Which NLM resources were highlighted at the meetings:** MedlinePlus (English and Spanish), PubMed, Household Products, Tox Town, and AIDSinfo (1000 character limit)
- Promotional Products(y/n):** Yes
- Promotional Products Quantity:** 100 Guides to NIH HIV/AIDS, 2bx Health Hotlines, 100 plastic bags, 200 screen cleaners, 150 clip caddies, 200 pedometers, 300 white flashlights, (1000 character limit)

A "Next ->" button is located at the bottom of the report area. The left sidebar contains navigation options for Organizations, National Exhibits, National Program Presence, State/Local Exhibits, and Other.

**NLM's Web Based Exhibit System -- Add Exhibit Report - Microsoft Internet Explorer**

Address: <http://wwwcf.nlm.nih.gov/webexhibits/viewExhResults.cfm>

## NLM External Exhibit System

Organizations

**National Exhibits**

View Schedules

View Summaries

Exhibit History

Add Natl Exhibit Suggestion

Modify Exhibit Suggestion

Delete Exhibit Suggestion

**National Exhibit Report**

Add Exhibit Report

Modify Exhibit Report

Delete Exhibit Report

View Exhibit Report

**National Program Presence**

Add Program Presence

Modify Program Presence

Delete Program Presence

**State/Local Exhibits**

Add State/Local Exhibit

View State/Local Exhibit

Modify State/Local Exhibit

Delete State/Local Exhibit

**Other**

Change Password

Logout

### View Exhibit Report-- Part II Help

Organization Name: **National Council of La Raza**

Meeting Name: **National Council of La Raza**

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**Cost Information**

Booth Space Cost: 2000.00 <small>(No commas or dollar sign)</small>	Internet Connection Cost: 750.00 <small>(No commas or dollar sign)</small>
Other Booth Costs: 1315.00 <small>(No commas or dollar sign)</small>	Shipping Cost: 167.00 <small>(No commas or dollar sign)</small>
Drayage/Handling Costs: 425.00 <small>(No commas or dollar sign)</small>	Total Travel Cost: 1248.00 <small>(No commas or dollar sign)</small>
Other Cost Amount: 0 <small>(No commas or dollar sign)</small>	

Other Cost Description:  (1000 character limit)

---

**Pre-Show Promotion**

Yes/No: **No**

Description:  (1000 character limit)

---

**Additional Comments**

Description:  (1000 character limit)

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**Report Information**

Author Last Name: **Carroll**      Author First Name: **Melissa**

Report Date: **Dec / 05 / 2005**

**NLM's Web Based Exhibit System -- View Exhibit Report -- Microsoft Internet Explorer**

Address: <http://wwwcf.nlm.nih.gov/webexhibits/viewExhNew.cfm?RID=7248mid=493&fsyr=2006&calyear=2006>

## NLM External Exhibit System

### View Exhibit Report -- Part I

Help

Organization Name: **American Academy of Forensic Sciences**

Meeting Name: **National Convention and Exhibition** Location: **Seattle, Washington**

Date: **02/20/2006 - 02/24/2006**

Booth Size:  Booth Structure:  Full display

Number of Attendees:

Total Exhibit Visitors:  Total Exhibit Hours:

Total NLM Demos:  Number of Other Exhibits:

Total Other System Demos:  FTE staffing exhibit:

Exhibit Again:  checked

Exhibit Again Rationale:  (1000 character limit)

Booth Location Description:  (1000 character limit)

Exhibit Staff Names:  (1000 character limit)

Notable Feedback:  (1000 character limit)

Which NLM resources were highlighted at the meetings:  (1000 character limit)

Promotional Products(y/n):  Yes

Promotional Products Quantity:  (1000 character limit)



**NLM's Web Based Exhibit System -- Add Exhibit Report -- Microsoft Internet Explorer**

Address: <http://wwwcf.nlm.nih.gov/webexhibits/viewExhResults.cfm>

## NLM External Exhibit System

Organizations

**National Exhibits**

View Schedules

View Summaries

Exhibit History

Add Natl Exhibit Suggestion

Modify Exhibit Suggestion

Delete Exhibit Suggestion

**National Exhibit Report**

Add Exhibit Report

Modify Exhibit Report

Delete Exhibit Report

View Exhibit Report

**National Program Presence**

Add Program Presence

Modify Program Presence

Delete Program Presence

**State/Local Exhibits**

Add State/Local Exhibit

View State/Local Exhibit

Modify State/Local Exhibit

Delete State/Local Exhibit

**Other**

Change Password

Logout

### View Exhibit Report-- Part II

Help

Organization Name: **American Academy of Forensic Sciences**

Meeting Name: **National Convention and Exhibition**

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**Cost Information**

Booth Space Cost: 0 <small>(No commas or dollar sign)</small>	Internet Connection Cost: 0 <small>(No commas or dollar sign)</small>
Other Booth Costs: 0 <small>(No commas or dollar sign)</small>	Shipping Cost: 0 <small>(No commas or dollar sign)</small>
Drayage/Handling Costs: 0 <small>(No commas or dollar sign)</small>	Total Travel Cost: 0 <small>(No commas or dollar sign)</small>
Other Cost Amount: 0 <small>(No commas or dollar sign)</small>	

Other Cost Description:

---

**Pre-Show Promotion**

Yes/No: **No**

Description:

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**Additional Comments**

Description:

---

**Report Information**

Author Last Name: **Milgrom** Author First Name: **Linda**

Report Date: **Mar / 02 / 2006**

<- Prev

The screenshot displays a web browser window titled "NLM's Web Based Exhibit System -- View Exhibit Report - Microsoft Internet Explorer". The address bar shows the URL: <http://wwwcf.nlm.nih.gov/webexhibits/viewExhNew.cfm?RID=730&mid=630&fisy=2006&calyear=2006>. The main content area is titled "View Exhibit Report -- Part I" and includes a "Help" link.

**Organizations**

- National Exhibits**
  - View Schedules
  - View Summaries
  - Exhibit History
  - Add Natl Exhibit Suggestion
  - Modify Exhibit Suggestion
  - Delete Exhibit Suggestion
  - National Exhibit Report**
    - Add Exhibit Report
    - Modify Exhibit Report
    - Delete Exhibit Report
    - View Exhibit Report
  - National Program Presence**
    - Add Program Presence
    - Modify Program Presence
    - Delete Program Presence
  - State/Local Exhibits**
    - Add State/Local Exhibit
    - View State/Local Exhibit
    - Modify State/Local Exhibit
    - Delete State/Local Exhibit
  - Other**
    - Change Password
    - Logout

**View Exhibit Report -- Part I**

Organization Name: **National Association of Hispanic Nurses**  
 Meeting Name: **31st Annual Conference** Location: **Phoenix, Arizona**  
 Date: **07/19/2006 - 07/21/2006**

Booth Size:  Booth Structure:   
 Number of Attendees:   
 Total Exhibit Visitors:  Total Exhibit Hours:   
 Total NLM Demos:  Number of Other Exhibits:   
 Total Other System Demos:  FTE staffing exhibit:   
 Exhibit Again:  checked

Exhibit Again Rationale:  (1000 character limit)

Booth Location Description:  (1000 character limit)

Exhibit Staff Names:  (1000 character limit)

Notable Feedback:

Which NLM resources were highlighted at the meetings:  (1000 character limit)

Promotional Products(y/n):  Yes  
 Promotional Products Quantity:  (1000 character limit)

**NLM's Web Based Exhibit System -- Add Exhibit Report -- Microsoft Internet Explorer**

Address: <http://wwwcf.nlm.nih.gov/webexhibits/viewExhResults.cfm>

## NLM External Exhibit System

### View Exhibit Report-- Part II

Help

Organization Name: **National Association of Hispanic Nurses**  
 Meeting Name: **31st Annual Conference**

**Cost Information**

Booth Space Cost: <a href="#">?</a> (No commas or dollar sign)	1500.00	Internet Connection Cost: <a href="#">?</a> (No commas or dollar sign)	900.00
Other Booth Costs: <a href="#">?</a> (No commas or dollar sign)	663.00	Shipping Cost: <a href="#">?</a> (No commas or dollar sign)	459.00
Drayage/Handling Costs: <a href="#">?</a> (No commas or dollar sign)	485.00	Total Travel Cost: <a href="#">?</a> (No commas or dollar sign)	0
Other Cost Amount: <a href="#">?</a> (No commas or dollar sign)	0		

Other Cost Description:  (1000 character limit)

**Pre-Show Promotion**

Yes/No: **No**

Description:  (1000 character limit)

**Additional Comments**

Description:  (1000 character limit)

**Report Information**

Author Last Name: **Carroll** Author First Name: **Melissa**  
 Report Date: **Apr / 10 / 2006**

## Appendix H. List of Potentially Relevant Citations From Literature Search

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