21st Annual Freelance Workshop (Virtual)

Building Leadership Strategies & Approaches for Medical Writers and Editors

Tips and Networking for Seasoned, New, and Aspiring Freelance Medical Writers and Editors

Saturday, March 11, 2023

Virtual Workshop 12:30 PM – 5:00 PM EST

Registration page: https://amwa-dvc.regfox.com/21th-annual-freelance-workshop

Program

12:30 – 12:35 PM – **Welcome** – Ndiya Ogba, PhD

12:35 – 12:40 PM – **Introductions from the Chapter President** – Helen Fosam, PhD

12:40 – 1:40 PM – **Keynote: Julia Klapproth, PhD**
Leading as Medical Writers in a Matrix-management Environment

1:45 – 2:30 PM – **Speaker: Tim Day**
Building/Growing Effective Leadership Among Medical Writers and Editors

2:35 – 3:20 PM – **Roundtable Session A** (virtual breakout rooms)

3:20 – 3:30 PM – **Break**

3:30 – 4:00PM – **Speaker: Endia J. Crabtree, PhD**
Using Actionable Diverse and Inclusive Language in Medical Writing Projects Reflects Cultural Competence

4:05 – 4:50 PM – **Roundtable Session B** (virtual breakout rooms)

4:50 – 5:00 PM – Wrap-up and close

Workshop Registration

Visit the registration page
Please select one workshop from session A and one from session B.

Registration Cost

AMWA Members: **$20**
Non-members: **$30**
Students and post docs: **$5**

Questions?

Contact freelanceworkshop@amwa-dvc.org with the subject line "Q AMWA-DVC 2023 Freelance Workshop"

Speakers

Keynote

12:40 – 1:40 PM

Leading as Medical Writers in a Matrix-management Environment

Julia Klapproth, PhD, Senior Partner, Trilogy Writing & Consulting, Frankfurt, Germany

In our current global, remote working environment, the value of medical writing depends on excellent interpersonal, active listening, and influencing skills in addition to strong technical writing ability. Much of our existing training programs focus on technical/knowledge-based competencies. However, developing medical writers to be leaders (of a project or of other writers) should also be an essential topic of training. As for any role, good medical writing leaders do not emerge fully formed from the seed of a medical writer. There is a specific skill set needed to make a great leader/people manager capable of successful collaborations with cross-functional, global teams and influential development of other medical writers. This talk will summarize what defines a good leader, key skills to master to be effective medical writing leaders, and how to step into the role as a leader in this space.

Speaker

1:45 – 2:30 PM

Building/Growing Effective Leadership Among Medical Writers and Editors

Tim Day, Principal/Owner Innovative Strategic Communications, LLC, Milford, Pennsylvania

As time progresses, so must the techniques and approaches taken to build leaders within the medical writer/editor community. Cultural, generational, and personal style differences often act to impede the development of leadership skills. This session is designed to help AMWA members see, understand, and take onboard those differences and turn them to the best advantage for all parties involved.

Experience is a good teacher. However, experience alone does not imbue people with the tools and talents to convey that experience to others, nor does it necessarily open those individuals to learning new methods and approaches from others.

This session will discuss how AMWA members across generations (Baby Boomers, Gen X, Gen Y and Gen Z) can garner a better understanding of differing perspectives and how these can help foster a better understanding of what it takes to be a leader in the post-pandemic, and chiefly remote working environments of today and tomorrow.

Speaker

Using Actionable Diverse and Inclusive Language in Medical Writing Projects Reflects Cultural Competence

3:30 – 4:00 PM

Endia J. Crabtree, PhD, Senior Clinical Evaluation Scientist, Clinical Product Risk, Peripheral Interventions at Boston Scientific

Knowing how to incorporate the appropriate language when describing populations in medical writing projects can pose a challenge. This is where competency of Diversity, Equity, and Inclusion comes in. We must do our part to be aware of the differences that individuals and populations have by acknowledging those identities and becoming culturally competent. Being abreast and accepting of what makes humans diverse will enable us to better serve them as medical writers.

Roundtable Breakout Sessions

(Choose 2 roundtables on the registration form, one for Session A breakout and one for Session B breakout)

2:35 – 3:20 PM **Roundtable Session A breakout** (virtual breakout rooms)

4:05 – 4:50 PM **Roundtable Session B breakout** (virtual breakout rooms)

Roundtable Options

1. **Situational Leadership** *(Larry Liberti, PhD, BPharm, RAC, Adjunct Research Professor, Reg Affairs and Quality Assurance, Graduate Program, Temple University School of Pharmacy)*

   There is no single best style of leadership. Rather, an effective leader can size up the situation and effectively adapt his or her approach to supporting others. Situational Leadership refers to the process of assessing the situation and then adapting your style to the needs of your colleagues. The effective use of situational leadership enhances a leader's credibility, increases the likelihood of satisfaction with the interaction, and maximizes the follower's performance.

Learn how to:

- Understand the importance of effective leadership.
- Understand your tendencies as a leader as well as an approach to leadership that will help you adapt your style to different types of situations.
- Be prepared to apply this new approach to your job and other daily interactions.

2. **Expanding Your Medical Writing to CME** *(Andrew D. Bowser, ELS, CHCP)*

Medical writers who expand their skills to Continuing Medical Education (CME) have a unique opportunity to further their career while providing healthcare professionals with engaging activities to improve their clinical practice and make a meaningful impact on patient outcomes. The demand for high-quality CME writing is on the rise as organizations seek to create engaging educational content that helps healthcare professionals meet their licensing and certification requirements. This presents a unique, rewarding, and fulfilling opportunity for medical writers to apply their expertise, creativity, and versatility, while also contributing to the improvement of patient care.

By participating in this roundtable, you will learn how to:

- Write needs assessments to highlight professional practice gaps that can be addressed through CME activities
- Craft compelling, evidence-based CME content that is relevant to the learning needs of healthcare professionals
- Utilize the latest techniques and technologies to create engaging CME content, including interactive case studies and animations
- Build relationships with healthcare professionals, subject matter experts, and other stakeholders in CME
- Report activity data and outcomes in a way that demonstrates the impact of CME activities on learner knowledge, competence, and patient care.

3. **Relationship Documents – Contracts and Noncompete** *(Cathryn D. Evans, DBA Chandos Communications)*

It is judicious to have a written contract for all freelance/consulting projects. There are circumstances under which it won't be necessary (e.g., a large company with whom you've established precedent for a specific hourly rate without a written contract, or a client you trust completely). There is no hard rule about what a contract should include. In this roundtable, Cathryn will present some specific experiences and we will all present our own experiences along with any questions people might have. We will discuss the most important ones during the roundtable session, including:

- A project outline
- Number and extent of revisions you will provide
- Payment schedule
- Confidentiality or non-disclosure agreement

Additionally, *PDF copies of sample text* for use in contracts, specifically with the pharma/biotech industry, will be sent to participants who request this by email after the session.

4. **Negotiating Project Scope and Pricing** *(Stephanie M. Vargas, MD)*

Regardless of experience, many freelance professionals find scope and price negotiations to be a particularly challenging aspect of running a business. Yet, the skill of negotiation and approaching such discussions with confidence is vital to success. This roundtable is an opportunity to participate in an interactive discussion that will help you approach client negotiations rationally and confidently so that you can meet your business objectives. This roundtable will help you learn to:

- Assess your value as a medical communications professional
- Describe the process of negotiation from preparation to commitment
- Identify pitfalls and how to avoid them
- Find learning opportunities in failures

5. **How to Find a Mentor** *(Laura Sheppard, MBA, MA)*

Oftentimes it can feel that creating your medical writing career is a series of endless challenges. We will discuss the key differences between coaching and mentoring. The powerful impact that finding the right mentor can make for you and your medical writing career is boundless. This interactive roundtable will help you learn best practices on how to find a mentor and focus on what's most important for your mentor/mentee relationship. True leaders make great mentors, and being a mentor is a way to enhance your leadership skills even further.

Goals of this roundtable are to learn:

- Best practices to find a mentor
- How to build a relationship with a mentor
- How to add value to a mentor-mentee relationship

6. **Fact Checking and Annotating for Medical-Legal Review (MLR)** *(Melissa Bogen, ELS)*

   Referencing is an integral part of the document development process. Medical writers need to reference every statement containing data or a fact. In addition, they need to mark up (annotate) the reference so fact checkers and reviewers can confirm the document is accurate.

   Melissa will explain what's entailed in fact checking and annotating references for MLR, focusing on how editors should check annotations, but also providing guidance on how writers should prepare annotations. Learn best practice guidelines that writers and editors can use.

   By the end of the roundtable, attendees will be able to:
   - Describe how to ensure accuracy of document claims
   - Annotate claims
   - Highlight reference PDFs to support the claims

7. **Insights on How Medical Communication Companies Choose Their Freelance or Contract Medical Writers and Editors** *(Mark Bowlby, PhD)*

   Ever wonder how medical writing and communication companies choose which freelancer to hire for a project? What characteristics do they seek in a medical writer or editor? Do freelancers always need to have experience in the type of document or therapeutic area of interest? This interactive roundtable will discuss selection strategies, expectations of freelancers, and more. Attendees will interact with the speaker and other attendees to gain multiple perspectives on the topic. After the roundtable, attendees will be able to understand the following:

   - Needs and considerations of medical communication and writing companies
   - Platforms or strategies used for searching for competent freelancers
   - Range of responsibilities of freelance medical writers and editors at different companies
   - Desired characteristics of freelancers
   - Impact of freelancers' performance on the likelihood of receiving subsequent projects

Workshops 8-10 focus on transitioning into the field of medical writing and editing from various backgrounds to help you determine if medical writing is right for you.

8. **Your Scientific Writing and Medical Communication Toolbox: A Guide for Scientists and Nonscientists** *(Darryl Z. L'Heureux, PhD, MSc, MS Pharm QARA)*

This roundtable will present different resources for transitioning medical writers who may have scientific or nonscientific backgrounds. As non-subject matter experts, medical writers must use their abilities to research and communicate clearly. We will discuss different educational resources to improve your scientific writing and to communicate with different audiences. In this roundtable session, we will identify different resources and tools including:

- templates, style guides, guidances, sample documents, and publications.
- best practices in review-revision cycles and editing documents.

9. **Transitioning to Medical Writing from a Clinical Background** *(Morgan Leafe, MD, MHA)*

Are you considering transitioning from a clinical career to the medical writing field and don't know how? Or have you been trying to make this leap without success? Join us for this roundtable with Dr. Morgan Leafe where she'll discuss

- Common barriers to entering medical writing and how to overcome them
- Frequently asked questions about training, job hunting, and portfolio building
- Helpful resources to get you started on your journey

10. **Transitioning to Medical Writing from a Journalism Background** (*Linda Felcone*)

This roundtable will be specific to building on past writing and editing experience to transition into medical writing and bring your particular expertise to the medical documentation table. (Examples of other humanities backgrounds besides journalism include language arts, journalism, report writing, editing, and teaching.) Topics will include the following:

- Presenting writing samples
- Document management (e.g., version control)
- Getting up to speed on the subject matter--depth of knowledge needed (Hint: everything is reviewed and revised multiple times)
- Brushing up on grammar, style, and rhetoric via AMWA
- Gaining technical precision through intellectual curiosity

Biosketches

Andrew D. Bowser, ELS, CHCP, is a freelance medical writer and editor who has specialized in CME writing for nearly 20 years. He is a member of the Alliance for Continuing Education in the Health Professions (ACEHP) and Chair of that organization's Research Committee. Andrew is an alumnus of the University of Delaware, where he studied journalism. In addition to freelancing, Andrew mentors and coaches other writers in their professional journey in the field of CME. He was recently featured on the Write Medicine podcast, Episode #39: Evolving CME/CE with Outcomes Reports. He also recently published an article in the *AMWA Journal* entitled: "Avoiding Bias and Ensuring Content Validity in Accredited Continuing Education: What Do the Latest ACCME Standards Mean for Medical Writers?" (*AMWA*. 2022;37(3). doi:10.55752/amwa.2022.170)

Cathryn D. Evans (DBA Chandos Communications), provides consulting and medical communications services to pharmaceutical and biotechnology companies in all media. Her early background includes technical writing and editing in the computer industry, traffic management in an advertising agency, and production assistance in a large printing firm. She is a Fellow and Past President of the American Medical Writers Association (AMWA) and a recipient of the association's *Golden Apple Award* for her work conducting numerous workshops and seminars. She initiated and is now one of five regular contributors to the AMWA Journal's *Freelance Focus* (formerly *Freelance Forum*), in which questions related to freelance writing and editing are answered. In addition to *The Business of Freelancing*, Ms. Evans has created and taught workshops and seminars on the following topics: *The Scope of Medical Communications, Communications in the Pharmaceutical Industry, Careers for Writers in the Pharmaceutical Industry, Video Production for the Pharmaceutical Industry, Freelance Writing as a Career, Selling Yourself as a Freelance.*

Darryl Z. L'Heureux, PhD, MSc, MS Pharm QARA, is the Director of Clinical Science and Documentation at Ambrx Biopharmaceuticals. As an active member of the medical writing community, he has spoken at multiple medical communication and scientific writing conferences and has chaired the AMWA-DVC's Princeton Conference and DIA's Annual Meeting and its Medical Affairs and Scientific Communications Forum for many years. As a former president of AMWA-DVC, he continues to serve on its Executive Committee, as well as DIA's Executive Committee for the medical writing community. He also consults with emerging biotech companies as the principal of MedSciTech Writing, LLC. As the Director of the Scientific Writing in the Professional Science Master's program at Temple University, he lectures on regulatory writing, publications, grant writing, and writing for non-scientists, in addition to speaking at career forums at universities.

Endia Crabtree, Ph.D., BCMAS®, CDP® (Dr/She/Her), is a Senior Clinical Evaluation Scientist, Clinical Product Risk in the Peripheral Interventions division at Boston Scientific. She has been in the regulatory medical writing field within the medical devices industry for 3 years. Dr. Crabtree has been a member of AMWA since 2020, where she serves as the Treasurer for the

AMWA Ohio Valley Chapter, a member of the AMWA D&I Assessment Task Force, and developer of the new Quarterly AMWA Chapter Treasurer's Meeting. Prior to joining the regulatory medical writing field, she investigated cancer survivorship treatment-related outcomes as a postdoctoral fellow at the University Cincinnati Cancer Institute and the Cancer and Blood Diseases Institute at Cincinnati Children's Hospital Medical Center. Additionally, she taught a graduate level epidemiology course at Xavier University (Ohio). She has extensive experience serving on and co-leading several DEI, health equity, DEI-related committees, and special interest groups (SIGs) with the American College of Epidemiology, AAAS Women in STEM Community, Cincinnati Children's Hospital Medical Center Division of Behavioral Medicine and Clinical Psychology, the International Society for Pharmacoepidemiology, the Paleontological Society, and the National Council of Negro Women (NCNW) Health Equity Breast Cancer Subcommittee. Dr. Crabtree also serves as a mentor with the National Society of Collegiate Scholars, and an unofficial career coach to various people within and outside of AMWA who are interested in getting into medical writing. Dr. Crabtree has a PhD in Public Health Education from the University of Cincinnati, a Master of Liberal Arts from Johns Hopkins University, a Master of Science in Public Health Education and a Bachelor of Arts in Anthropology from the University of Michigan-Flint. In 2022, she earned certification as a Board-Certified Medical Affairs Specialist (BCMAS) from the Accreditation Council of Medical Affairs (ACMA), and in 2023, she earned Certified Diversity Professional certification (CDP) from the Society for Diversity.

Helen Fosam, PhD, is a freelance medical writer and owner of The Edge Medical Writing. Medical writing for medical education brings together Helen's interest in the sciences, medicine, and communication. Helen applies her 20 years of medical writing experience to help address key needs for content development, including well-written needs assessments, slides, abstracts, manuscripts, or conference reports. Helen's reputation for professionalism and efficiency, with a commitment to deliver high quality work to strict deadline and budget, provides seamless extension to writing teams in the pharmaceutical, biotechnology, and medical communication industry sectors to meet looming deadlines. Helen is co-chair of the 2022 AMWA-DVC Freelance Workshop and the founder of the Missing Link to Improved Health Outcomes (MiLHO) Initiative, focused on creating online CME courses for healthcare professionals in Africa.

Julia Forjanic Klapproth, **PhD**, started working as a medical writer in the regulatory arena after getting her PhD in Developmental Neurobiology in 1997. In 2002, Julia co-founded Trilogy Writing & Consulting, a company specialized in providing regulatory medical writing and is still involved in writing and coordinating many documents. Julia has twice been President of the European Medical Writers Association (EMWA) (2001-2002, 2007-2009) and is a member of the American Medical Writers Association (AMWA) Medical Writing Executives Advisory Council and the Value of Medical Writing Working Group committees. Julia is passionate about the value of good medical writing and is an experienced trainer of medical writers, regularly running workshops for EMWA, AMWA, DIA, and pharmaceutical companies around the world.

In 2022, she received the Harold Swanberg Distinguished Service Award for her contribution to the field of medical communications.

Larry Liberti, PhD, BPharm, RAC, has worked in the field of pharmaceutical regulatory affairs and communications for the past four decades. From 2009 to 2019 he has served as the Executive Director of CIRS (the Centre for Innovation in Regulatory Science), and from 2019 to 2021 as Head of Regulatory Collaborations. Since 2021 he has been an Adjunct Research Professor in the graduate school of pharmacy, Temple University. He is a volunteer Director of the Erudee Foundation, a non-profit that supports the www.FRPath.org project. Larry is a pharmacist and received his doctorate in International Regulatory Policy through the WHO Collaborating Centre for Pharmaceutical Policy and Regulation based in the Utrecht Institute for Pharmaceutical Sciences, the Netherlands, where his research centered on expedited regulatory pathways with applicability in the emerging markets. He attained the status of Regulatory Affairs Certified (RAC) with the Regulatory Affairs Professional Society (RAPS) and serves on its Board of Directors. He is a Fellow of the American Medical Writers Association and is a recipient of their Golden Apple award for excellence in teaching.

Laura Sheppard, MBA, MA, is the Senior Director of Regulatory Services Management and Head of the Lay Summary Team. She oversees a global team of over 250 writers of varied skill sets with the goal of growing the internal talent pool to address tomorrows writing needs. She has 20 years of experience in regulatory and clinical writing, lay writing, translational science, clinical development, and clinical operations, including 15 years in medical writing and regulatory strategy experience with global marketing applications for both biologics and small molecules, as well as for Investigational New Drug (IND) and Clinical Trial Authorization (CTA) applications. Her experience in therapeutic areas includes anti-infectives, cardiovascular, central nervous system, endocrinology, gastrointestinal, immunology, nephrology, neurosciences, oncology, pain management, rare disease, respiratory, urology, and xenotransplantation. Ms. Sheppard served three consecutive terms with the American Medical Writing Association as a Director-At-Large. She volunteers with her chapter, the Delaware Valley Chapter as an Events Coordinator.

Linda Felcone made her living for 30 years as a medical writer—starting with editorial work for a continuing education journal for dentists and ending with regulatory writing. A former English/Writing teacher and part-time news reporter, she liked to write. She began writing small pieces for the journals she edited on subjects that interested her like HIV and pain management. Once she had a portfolio of articles—medical and non-medical—she became curious about how drugs are developed. After attending a conference on New Drug Applications sponsored by the FDA, she started writing on drug safety and specialized in drug labeling, drug applications, and medical affairs then did the same type of writing as a work-from-home consultant.

Mark Bowlby, PhD, has over 24 years of experience in the clinical research and drug development industry. During those years, he held several writing roles, including in publications and regulatory writing. Mark is currently a Principal Regulatory Writer and Director of Global Submissions at Synchrogenix where he works with clients of all sizes. He works with freelance, in-house, and client writers and values the needs of all parties. This perspective will inform the discussion and allow the participants to understand the needs of the hiring company and the client. Mark is currently serving as Treasurer of AMWA-DVC.

Melissa Bogen, ELS, has been a full-time freelance editor since 1997. Her expertise is in editing, fact checking, and proofreading medical manuscripts, pharmaceutical sales training materials, and multimedia programs for healthcare professionals in a wide range of therapeutic areas. Melissa has in-depth knowledge of AMA style, FDA guidelines, & editorial production processes. Since 2006, she has regularly presented at local and national AMWA conferences on the scope of medical editing, Microsoft Word Tips and Tricks, the differences between editing and proofreading, and fact checking and annotating for MLR review.

Morgan Leafe, MD, MHA double board-certified physician, medical writer, editor, and copywriter. She runs her own successful freelancing business offering an array of services including medical education, patient education, executive resume writing, journalism, copywriting, and board review. Morgan also offers career counseling to physicians interested in transitioning to the medical writing field.

Ndiya Ogba, PhD, MWC, is an Associate Director of Publications within the Medical Affairs Division at Ascentage Pharma and is responsible for supporting all publication activities of the research, regulatory, and clinical development teams. Before working as a medical writer, Ndiya earned her PhD in pharmacology and was a postdoctoral fellow at the University of Colorado School of Medicine. Her research experience in breast cancer helped her pursue a transition to medical writing in 2016 with the National Comprehensive Cancer Network (NCCN), where she helped develop several clinical practice guidelines for oncologists, including new ones concerning pediatric blood cancers. She has been a member of AMWA for 6 years, earned the Medical Writing Certification (MWC) credential in 2020, and is co-chair of the 2023 AMWA-DVC Freelance Workshop.

Stephanie M. Vargas, MD, is the Principal Consultant and owner of Med Ink Consulting. Through her work, Stephanie strives to provide comprehensive medical communications services that meet the unique needs of her clients and helps them plan and achieve their strategic goals. As an active member of the medical communications community, Stephanie has served as President of the Greater Chicago Area Chapter of AMWA and has served twice on the annual conference committee for AMWA. In her free time, Stephanie enjoys going for long walks around town with her husband, Alex, and their dog, Indy Jones. Stephanie earned her MD from Indiana University School of Medicine and her BS in Biology from Purdue University.

Tim Day, has 30 years of international marketing and publication experience. This includes pharmaceutical industry experience at Bayer Corp. as a product manager on Cipro®.

He has extensive experience working on publications with global opinion leaders based on his coordination of three advisory boards at Bayer, and in his subsequent position as Vice President of MCR Vision, the group that originally organized the GOLD, GINA, and ARIA guideline initiatives.

On the medical communications side, Tim has decades of experience including five years as Director of Creative Services for the medical marketing group at PAREXEL. In 2008, he founded Innovative Strategic Communications as a niche medical communications agency focusing on publications and supporting activities. He has been involved with AMWA for four years and presented at the 2021 and 2022 annual meetings.

AMWA-DVC greatly appreciates the time and effort of the Freelance Workshop volunteers.

Thank you:

Aurore Lebrun
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