# CME/CE Activity Directors Toolkit:

How to Plan a Live Course

## **Getting Started: (upon course Kickoff, 7-9 months prior to course date)**

## Assign Roles

* 1. Complete your own Financial Disclosure, and direct your planning team members to complete theirs as well
  2. Read, Understand, Sign and Return the Activity Director Letter of Responsibility
  3. Return all Disclosures immediately to the CME Office
  4. Convene a Curriculum Planning Team meeting
  5. Analyze disclosures for Conflict of Interest, map any needed recusals, find replacements
  6. Identify a Content Validation Reviewer and Conflict Resolution Reviewer and ask them to execute Reviewer Letters of Responsibility
  7. Verbally contact proposed speakers/ instructors, and collect their Financial Disclosures
  8. Analyze Speaker disclosures for Conflict of Interest and plan for recusals/replacements

## Develop the Course Proposal

* 1. Develop a Timed Agenda for the Course, with topics, timespans, (and speakers if known)
  2. Identify your target audience(s) for the course
  3. Gather/Document your Courses Needs Assessment Data
  4. Develop your Course’s Learning Objectives, specific to your audience’s scope of practice
  5. Design an Outcomes Measurement strategy (assessment, quiz, test, survey, chart-audit)

## Develop a funding plan for your Course:

* 1. Estimate course expenses (large costs are speakers, travel, meals/venue rental, printing)
  2. *(Optional)* Identify grantors/sponsors and target dollars for each
  3. *(Optional)* Identify prospective paid exhibitors and target sales revenue
  4. Identify registration pricing levels.
  5. Project a Break-Even Budget including all estimated expenses and revenues
  6. Choose a Financial Management Model for your Course **(more info here)**

## **Submit your Course Accreditation Application to the CME office (6-7 months prior)**

* 1. Consider an accreditation verbal Interview, but bring all the above materials
  2. Apply for other and non-physician credit types (ANCC, CEU, MOC, other clinical CE)
  3. Be available to answer follow-up questions from the CME office, **and await the  
      determination of the CME Office of eligibility(2 weeks)** for the credits requested

## ***Upon receiving your credit notification from the CME Office (but not before),***

## Plan and Promote your Course (5 months prior to course)

* 1. Book your venue,
  2. Rent commercial mailing lists of target audiences, if appropriate
  3. Send all speakers/instructors a Confirmation Letter, with presentation and assessment   
      due dates, speaker expectations, and conflict resolution procedures
  4. Finalize your agenda, Design brochure, website, and any other course promotion   
      materials **(4 month prior to course)**
  5. Contact your Fundraising Team in the CME office and provide them with ALL of the  
      above items, to be used to construct a successful academic grant-writing campaign
  6. Open registration on the course website
  7. CME Office exclusively submits all grants, receives and disburses all grant awards.   
      **Activity Director and content planners are not permitted do this.**
  8. CME Office exclusively contracts with all paid exhibitors**. Activity Director and content   
      planners are not permitted to do this.**
  9. Print your brochures **(3 months prior to course)**
  10. Develop Course format and optimize layout of the instructional venue for active learning

## Content Validation (1 month prior to course)

* 1. Collect Speaker Presentations
  2. Review for Commercial Independence
  3. Assign to Reviewer for Content Validation
  4. Assign Assessments for Peer Review
  5. Resolve Conflicts of Interest, **and request speakers modify presentations as needed**
  6. Produce final versions of presentations that communicate disclosures or lack thereof
  7. Produce final version of assessments, quizzes, polls, tests
  8. Confirm with Vendors and suppliers (Two weeks prior to course)
  9. Finalize Catering Contracts
  10. (if provided)Finalize Lodging, Travel, transportation
  11. Finalize Course Audiovisual plan

## On the Course Date

* 1. Register, check-in, or attest attendance from all participants
  2. Monitor vendors for code of conduct, and separation of promotion from education
  3. Supervise speaker adherence to timed agenda
  4. At exit or within 24 hours, send Evaluation survey and assessment to learners

## Post-Course (< 30 days after course )

1. Reconcile all expense and income to budget
2. Analyze tabulated evaluations and determine learning outcomes attained
3. Meet with planning team to convey survey results and debrief on next-cycle   
    improvements