



SYMPOSIUM CHECK LIST

Name of Symposium: _____ Date: _____

Planning Committee Members: _____

| 9 to 12 months prior | Deadline Date | Date Completed | Person Responsible | Comments |
|--|---------------|----------------|--|----------|
| Identify and document educational need, topics and possible speakers | | | Planning Committee | |
| Determine overall course objectives and target audience | | | Physician Planner/ Planning Committee | |
| Determine hours and format | | | Planning Committee | |
| Select date; check site availability | | | | |
| Invite speakers, obtain CV & negotiate honoraria | | | Physician Planner | |
| Confirm site (adequate seating, A/V & displays) | | | | |
| Determine commercial supporters to contact | | | Planning Committee | |
| Determine # of mailings | | | Planning Committee | |
| Set deadline dates for mailing(s) | | | Planning Committee | |

| 6 to 9 months prior to Symposium | Deadline Date | Date Completed | Person Responsible | Comments |
|--|---------------|----------------|--------------------|----------|
| Develop agenda | | | | |
| Draft objectives for each topic | | | Planning Committee | |
| Send confirmation letters to speakers (w/ agenda, planning form, W9, A/V) | | | | |
| Send request letters, copy of agenda and letter of agreement to reps | | | | |
| Define proposed budget (registration fee, display fee, honoraria, etc.) | | | | |
| Inform CME Committee | | | CME Manager | |
| Begin developing "save the date" mailing | | | | |
| Select & order mailing lists for target audience | | | | |
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| Obtain exact topics and clinical/admin. positions from speakers for brochure | | | | |
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| 4 to 6 months prior to Symposium | Deadline Date | Date Completed | Person Responsible | Comments |
|--|---------------|----------------|--------------------|----------|
| Send 1 st mailing | | | | |
| Begin developing brochure | | | | |
| Determine method of evaluation | | | CME Manager | |
| Planning form & attachments prepared for CME Committee | | | | |
| Determine how registration and fees will be tracked & by whom | | | Planning Committee | |
| Develop confirmation materials for registrants | | | | |
| Hotel reservations for speakers as needed | | | | |
| Confirm commercial supporters & track receipt of agreement | | | | |
| Identify special needs (i.e. dinner prior to, reception following) & make arrangements | | | | |
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| 2 to 4 months prior to Symposium | Deadline Date | Date Completed | Person Responsible | Comments |
|---|---------------|----------------|-----------------------------------|----------|
| Finalize brochure & order appropriate quantities | | | | |
| Mail brochure | | | | |
| Submit planning form & attachments to CME Committee for review | | | CME Manager | |
| Develop poster for advertising | | | | |
| Obtain CV, W9, disclosure, objectives, A/V needs & syllabus materials from speakers | | | | |
| Begin compiling syllabus (cover pages, etc.) | | | | |
| Determine staffing for registration | | | Planning Committee/ CME Office | |
| Determine & order necessary supplies (i.e. badges, ribbons, gifts for RMH speakers, etc.) | | | | |
| Slide at Grand Rounds | | | CME Manager | |
| | | | | |

| 1 to 2 months prior to Symposium | Deadline Date | Date Completed | Person Responsible | Comments |
|---|---------------|----------------|--------------------|----------|
| Order refreshments with estimated attendance | | | | |
| Prepare/Order A/V needs | | | | |
| Confirm set up with site (registration & display tables, risers, podium, coat rack, easels, break tables, panel tables) | | | | |
| Process registrations | | | | |
| Send confirmations | | | | |
| Finalize syllabus (Handouts, disclosures, agenda, commercial supporters, note pages) | | | | |
| Print syllabus copies | | | | |
| Complete check requests if speakers are to be paid at the event | | | | |
| Prepare evaluations & certificates | | | | |
| Send 2 nd letter to speakers re: travel, accommodations, dinner with expense form & env. | | | | |
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| ONE WEEK prior to Symposium | Deadline Date | Date Completed | Person Responsible | Comments |
|---|----------------------|-----------------------|---------------------------|-----------------|
| Reconfirm arrangements with speakers | | | | |
| Reconfirm arrangements with site | | | | |
| Ensure that all required CME paperwork has been received (agreements, etc.) | | | CME Manager | |
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| | | | | |
| WEEK of Symposium | Deadline Date | Date Completed | Person Responsible | Comments |
| Confirm staffing and train | | | | |
| Develop registration list in alphabetical order | | | | |
| Make name badges | | | | |
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| DURING Symposium | Person Responsible | Comments |
|---|-------------------------------|-----------------|
| Staff registration desk & trouble-shoot | | |
| Logistical announcements, instruct attendees to complete & submit evaluations, and keep to the schedule | Physician Planner | |
| Exchange certificates for complete evaluations | | |
| Finalize attendance list | | |
| | | |

| AFTER Symposium | Deadline Date | Date Completed | Person Responsible | Comments |
|--|--------------------------|---------------------------|-------------------------------|-----------------|
| Summarize evaluations | | | | |
| Calculate final attendance (physicians vs. non-physicians) | | | | |
| Prepare final budget | | | | |
| Prepare final evaluation report | | | | |
| Wrap up meeting with planning committee | | | | |
| Review final report with CME Committee | | | CME Manager | |
| Add to Activity List | | | CME Office | |