

**BUILDING THE COURSE FOUNDATION**

**Course Director**

- Schedule initial concept meeting with CME office
- Submit course application via HighMarks
  - Assign an Independent Reviewer (IR)
  - Assign other continuing education planners, i.e. nursing, physical therapy, occupational therapy, etc. (if applicable)
  - Planners & IR Disclosures submitted via HighMarks
  - Note: Rooms are made available for booking one year in advance. If you have a specific date in mind, please notify us at least 12 months prior.

- Submit list of committed speaker names and email addresses
- Submit list of grantors to approach (if applicable)

**CME Office**

- Course is approved by CME committee
- Review and approve completed course application
- Reserve room space
- Create Save the Date website

**COURSE STRUCTURE AND EXECUTION TIMELINE**

	6 months prior	5 months prior	4 months prior	3 months prior	2 months prior	1 month prior	COURSE DATE
<b>Course Director</b>	<ul style="list-style-type: none"> <li>• Submit finalized agenda via HighMarks</li> <li>• Schedule course planning meeting</li> </ul>	<ul style="list-style-type: none"> <li>• Approve planning budget (n/a if "opt-in")</li> <li>• Work with CME on brochure design</li> </ul>	<ul style="list-style-type: none"> <li>• Provide edits for brochure</li> <li>• Approve final brochure</li> <li>• Submit list of exhibitors to approach</li> </ul>	<ul style="list-style-type: none"> <li>• Ideal mail date</li> </ul>	<ul style="list-style-type: none"> <li>• Latest possible mail date</li> </ul>	<ul style="list-style-type: none"> <li>• <b>1 day prior:</b> Ensure all final edits of presentations have been submitted by 12 noon on day prior</li> </ul>	
<b>CME Office</b>	<ul style="list-style-type: none"> <li>• Begin grant submissions</li> <li>• Prepare planning budget</li> <li>• Run course planning meeting</li> </ul>	<ul style="list-style-type: none"> <li>• Marketing Coordinator begins brochure design</li> <li>• Prepare and send faculty letters</li> </ul>	<ul style="list-style-type: none"> <li>• Order mailing lists</li> <li>• Finalize brochure and send to Print Shop for mailing</li> <li>• Open course registration</li> <li>• Begin email blasts</li> </ul>	<ul style="list-style-type: none"> <li>• Prepare and send exhibitor invites</li> </ul>	<ul style="list-style-type: none"> <li>• Send registration updates</li> </ul>	<ul style="list-style-type: none"> <li>• Collect presentations for content validation and syllabus</li> <li>• Confirm catering</li> <li>• Confirm A/V</li> <li>• Prepare syllabus</li> </ul>	<ul style="list-style-type: none"> <li>• Manage registration for speakers and learners</li> <li>• Manage A/V</li> <li>• Ensure smooth execution of the course!</li> </ul>

**DETAILS DISCUSSED IN COURSE PLANNING MEETING**

- Discuss Course Registration Fees
- Discuss Course Size
- Determine Tuition Fees
- Determine Exhibitor Fees
- Determine Number of Mailings
- Discuss Target Audience & Mailing/Email Strategy
- Internal and External
- Discuss Potential A/V Needs
- Discuss Catering
- Choose Syllabus Type
- Discuss Hotel Options
- Discuss Honoraria
- Special Requests