

Event Planning Checklist for Activities Using CLPD Marketing and Registration Services

☑	Action Items Pre-Conference	Person Responsible	Suggested Completion Timeframe
	Reserve conference room or site	Event Planner	9 - 12 months
	Reserve overnight rooms for faculty and/or blocks of rooms for participants at area hotels to make overnight accommodations, if needed.	Event Planner	9 - 12 months
	Planning meetings (include representation on planning committee for accreditation types)	Event Planner, Lead Planner, Planning Committee	9 - 12 months
	Create draft of advertising flyer (ACE Office provides templates)	Event Planner	8 - 9 months
	Complete accreditation application and required attachments (budget, needs assessment, draft of advertising) <ul style="list-style-type: none"> All planner and faculty member emails must be added into the application before it can be submitted for the electronic financial disclosure and mitigation process Applications <u>must be</u> submitted no later than 45 days before a program Registration and advertising for live activity <u>must not</u> be published prior to final approval of the activity application 	Lead Planner	8 - 9 months (no later than 45 days prior to the activity date)
	Complete CLPD mailing list request form	Event Planner	8 months
	Flyer proofing & final application approval	ACE Team	7 - 8 months
	Generate webpage course listing	CLPD Systems Analyst	6 - 7 months
	Send email blasts	CLPD Administrative Assistant	6 - 7 months
	Send exhibit and/or grant support request(s), if applicable	Event Planner	6 - 7 months
	Send speaker letters requesting slides/handouts, bio form for introductions, etc.	Event Planner	6 - 7 months
	Registrations received online	CLPD Administrative Assistant	5 - 6 months
	Apply for special accreditations (i.e., NASW, CDR, AAFP, etc.), if applicable	Event Planner	4 - 5 months
	Provide ACE team final plan of the day	Event Planner	4 weeks
	Receive speaker information, slides/handouts, bio forms, etc.	Event Planner	3 - 4 weeks
	Request Honoraria Check(s), if applicable	Event Planner	3 weeks
	Order food & set up	Event Planner	1 - 2 weeks
	Design evaluation and outcomes measure	CLPD Systems Analyst	1 - 2 weeks
	Send speaker slides/handouts to CLPD to be included in the registrant pre-email and accreditation file	Event Planner	1 week
	Receive registration data from CLPD to make nametags, labels, participant list	Event Planner	5 days
	Provide required pre-conference accreditation paperwork to activity coordinator to be distributed to the learners	ACE Team	3 - 4 days
	Send pre-mail to registrants including Webex link, slides/handouts	ACE Team	3 - 4 days
	CONFERENCE DATE		POST-CONFERENCE
	Email evaluation and outcomes measure	CLPD Systems Analyst	24 hours
	Retrieve evaluation and outcomes data and send to ACE Team	CLPD Systems Analyst	1 month
	Send evaluation summary to event planner and lead planner	ACE Team	1 month
	Send evaluation summary to planning committee	Event Planner	1 month
	Send faculty thank you letter and their individual session summary	Event Planner	1 - 2 months