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**Event Planning Checklist for Activities Using CCEHS Marketing and Registration Services**

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| ☑ | **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 NCEC Nurse Planner if CNE) | Event Planner, Activity Director, Planning Committee | 9 – 12 months |
|  | Complete CME Application and required accreditation attachments (Budget, Needs Assessment, Objectives, COIs for planners, etc.) | Activity Director | 9 – 12 months |
|  | Complete the Marketing Intake Form for brochure or postcard | Event Planner | 8 – 9 months |
|  | Complete Mailing List Request Form and Referring Providers Request | Event Planner | 8 months |
|  | Brochure Design, Proofing & Final Approval | CCEHS Web Media & Production Specialist, Event Planner, Activity Director/Planning Committee | 7 – 8 months |
|  | Brochure to Printer and Mail House  | CCEHS Web Media & Production Specialist | 6 months |
|  | Send Exhibit and/or Grant Support Requests | Event Planner or CCEHS Grant Manager | 6 – 7 months |
|  | Send Speaker Letters including Speaker Info Form, COI Form, Bio Data Form, Slides/Handouts, etc. | Event Planner | 6 – 7 months |
|  | Registrations Received Online | CCEHS Registrar | 5 – 6 months |
|  | Apply for special accreditations (i.e., NASW, CDR, AAFP, etc.) | Event Planner | 4 – 5 months |
|  | Submit CNE Accreditation Paperwork and required attachments (Budget, Needs Assessment, Objectives, COIs for planners and Bio Data Form if CNE, etc.) | Event Nurse Planner | 4 weeks |
|  | Receive Speaker Info Form, COI Forms, Bio Data Forms, Slides/Handouts, etc. | Event Planner | 3 – 4 weeks |
|  | Request Honoraria Checks, if applicable | Event Planner | 3 weeks |
|  | Resolve Conflicts | Activity Director/ NCEC Nurse Planner | 2 – 3 weeks |
|  | Order Food & Set Up | Event Planner | 1 – 2 weeks |
|  | Send Course Materials to Printers  | Event Planner | 1 – 2 weeks |
|  | Design Evaluation and Outcomes Measure | CCEHS Systems Analyst | 1 – 2 weeks |
|  | Receive Registration Data from CCEHS to make Nametags, Labels, Participant List | Event Planner | 5 days |
|  | Provide required accreditation paperwork to Event Planner | CME/CNE Accreditation Manager | 3-4 days |
|  | **CONFERENCE DATE** |  | **POST-CONFERENCE** |
|  | Email Evaluation and Outcomes Measure  | CCEHS Systems Analyst | 24 hours |
|  | Retrieve Evaluation and Outcomes Data and Send to Event Planner | CCEHS Systems Analyst | 1 month |
|  | Send evaluation summary to Planning Committee and/or Activity Director | Event Planner | 1 month |
|  | Send faculty thank you letter and their individual session summary | Event Planner | 1 – 2 months |
|  | Final Outcome Measure Data Collection | CCEHS Systems Analyst | 3 months |

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