Dartmouth Health

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 NCEC Nurse Planner if CNE)	Event Planner, Lead Planner, Planning Committee	9 – 12 months
	Create draft of advertising flyer (CE Office provides templates)	Event Planner	8 – 9 months
	Complete accreditation application and required attachments (budget, needs assessment, draft of advertising) • 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 must be submitted no later than 45 days before a program • Registration and advertising for live activity must not be published prior to final approval of the activity application	Lead Planner	8 - 9 months (no later than 45 days prior to the activity date)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	CE Office	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 CE Office 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 Event Planner to be distributed to the learners	CE Office	3 -4 days
	Send pre-mail to registrants including Webex link, slides/handouts	CLPD Systems Analyst	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 CE Office	CLPD Systems Analyst	1 month
	Send evaluation summary to event planner	CE Office	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