

BUILDING THE COURSE FOUNDATION

Course Director

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

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