



PLANNER'S CHECKLIST For Live CME Activities

Course Title: _____

Course Date(s): _____

Task to be Done	People Responsible	✓ Completed
Conduct gap analysis	Activity Director	
Planning Committee meeting to: <ul style="list-style-type: none"> ▪ Complete Activity Planning Form ▪ Sign <i>Letter of Agreement for Educational Activity Management and CME Credit</i> ▪ Obtain signed Disclosure Statements from planning committee ▪ Set schedule and choose presenters ▪ Establish budget 	Activity Director, Planning Committee Member, CME Project Manager	
Send completed planning form to CME Office for approval and certification	Activity Director	
Reserve facility and sign contract	Activity Director, CME Project Manager, Planning Committee Member	
Contact and confirm speakers	Activity Director, Planning Committee Member	
Send speaker confirmation letters	CME Project Manager	
Collect CV's and signed disclosure statements from presenter(s)	CME Project Manager	
Review signed disclosure statements for affiliations with industry	CME Project Manager	
Seek educational grants if requested*, Joint Provider Agreement Form for Commercial Support	CME Project Manager, Activity Director	
Send letters of solicitation to potential exhibitors	Activity Director, CME Project Manager, Planning Committee Member	
Develop mailing list	Activity Director, CME Project Manager, Planning Committee Member	
Create draft marketing materials	Activity Director, CME Project Manager, Planning Committee Member	
Revise marketing materials and send for printing and distribution	Activity Director, CME Project Manager, Planning Committee Member	
Obtain PowerPoint presentations from presenters	CME Project Manager	
For speakers with disclosures, review presentation slides and resolve conflicts	CME Project Manager	
Order food and beverages	Activity Director, CME Project Manager, Planning Committee Member	
Create syllabus, evaluation, and credit request forms; make copies	CME Project Manager	
Develop registration spreadsheet and enter registrant information	Activity Director, CME Project Manager, Planning Committee Member	
Create sign-in sheets and name badges	CME Project Manager	
Print and distribute certificates (conferences)	CME Project Manager	
Summarize participants' completed evaluation forms	CME Project Manager	
Activity close-out form	CME Project Manager	
Pay expenses and reconcile budget	CME Project Manager,	

