Stanford MEDICINE | Stanford Center for Continuing Medical Education

Conferences and Workshops Planning Process

The abbreviated planning grid below gives you a quick overview of the process and timeline. Subsequent pages provide additional details about each phase.

Abbreviated Planning Grid

Phase Description	Timeline
Phase 1 - *Consultation on Proposed Activity* Initial consultation and collaborative assessment of new activity concept to determine if request is in alignment with SCCME mission: • Clarify conference goals • Review of six phase cycle of planning • Review roles and responsibilities • Financial backstop • Determine go/no go decision	12+ months in advance of activity
Phase 2 – *Activity Pre-Planning* Establish Course Director/s and Planning Committee structure: • Assign CME Coordinator • Establish conference date and venue • Establish planning timeline • Set up standing planning meetings • Gather planner documents and resolve financial conflicts • Decision on requesting commercial/in-kind support	11 months in advance of activity
Phase 3 – *Activity Planning* The CME Application facilitates and documents the planning process by addressing elements that are both helpful and required by our accrediting body (ACCME): • Review application components • Identify professional practice gaps that exist between current and best practices • Document course development • Develop budget and receive financial approval • Develop marketing plan • Submit Internal Commercial Support Request as appropriate	10 months in advance of activity
Phase 4 – *Activity Approval and Marketing* In this phase, the CME Application is reviewed/ modified, given final approval and the marketing plan is implemented: • Approve CME Application • Create marketing collateral • Create and open registration and course website • Send invitations to intended audience • Send faculty packets • Collect all faculty documentation	7 - 6 months in advance

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Phase Description	Timeline
Phase 5 - *Course Delivery* Ongoing preparation for course delivery. • Create syllabus • Collect speaker presentations • Review/modify presentations for ACCME rules, copyright and HIPAA issues • Ensure receipt of all faculty documentation and resolution of conflicts • Set up venue • Provide on-site staff support for course delivery	1 month in advance through course date
Phase 6 - *Post Activity* During this phase we prepare to close the conference which includes learner evaluations and assessing multiple aspects of the planning and outcomes of the course. For recurring courses this data sets the stage for the needs assessment for the next course. • Email evaluation immediately post event to participants to assess impact of the education • Complete expense settlements and reconcile budget • Meet with Course Director(s) and Planning Committee to debrief • Email performance evaluation 60 days post event to assess practice changes, as appropriate	End of conference through 2 months post event

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Phase 1 - Consultation on Proposed Activity

Contact the Stanford Center for Continuing Medical Education (SCCME) **at least 12 months** in advance of the proposed activity to ensure the necessary time to discuss the conference concept and its planning, approval, and promotion.

The SCCME evaluates new activity proposals to make sure that they are consistent with the Center's mission. The Center must also ensure there are sufficient resources to support the proposed activity and the Stanford Department/Institute/Division requesting the continuing medical education (CME) activity is prepared to financially backstop activity deficits. The consultation results in a collaborative decision regarding the appropriateness of the concept for certified continuing medical education.

Key tasks include:
- Clarify conference goals
- Review of six phase cycle of planning
- Review roles and responsibilities
- Financial backstop
- Determine go/no go decision

Phase 2 – Activity Pre-Planning

In this phase, the Course Director (a Stanford School of Medicine physician faculty member) establishes a Planning Committee and coordinates the activity planning process with the support of the CME Conference Manager. More than one planner is recommended and required if the Course Director has a conflict of interest relevant to the subject matter of the activity. These planners will be responsible for completing the CME Planning Documentation Worksheet and Application (CME Application) in Phase 3. The CME Conference Manager will facilitate the planning and implementation process.

Key tasks include:
- Assign CME Coordinator
- Establish conference date and venue
- Establish planning timeline
- Set up standing planning meetings
- Gather planner documents and resolve financial conflicts
- Decision on requesting commercial support

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Phase 3 – Activity Planning

Activity planning is the responsibility of the Course Director and includes identifying professional practice gaps that exist between current and best practices and determining the educational content that will address those gaps. Among other things, speakers and topics are selected as well as the most appropriate educational format, learning objectives and educational outcomes measurement methods for the activity.

The Stanford CME Application is the primary vehicle used to facilitate and document the planning process so that all important activity elements are addressed and Accreditation Council for Continuing Medical Education (ACCME) regulatory requirements are met.

CME Applications must be approved prior to promotion and/or advertising of a CME activity. For this reason, activity applications must be completed and submitted to the Stanford Center for CME **6-9 months** in advance of the activity.

Key tasks include:
- Review application components
- Identify professional practice gaps that exist between current and best practices
- Document course development
- Develop budget and receive financial approval
- Develop marketing plan
- Submit Internal Commercial Support Request as appropriate

Phase 4 – Activity Approval and Marketing

In this phase, SCCME staff review the activity application, note necessary additions or modifications, and work with the Course Director on supplementing the application with missing information. Once fully complete, the application is sent for final accreditation review. If no additional modifications are required, the CME Application and supporting documentation are sent to the Associate Dean for Postgraduate Medical Education for final approval.

In addition, during this phase much of the course's production takes place. This includes: sending all necessary materials to faculty, collecting faculty documentation, developing and sending marketing materials, creating a course website and registration process, and faculty begin creating their presentations, etc.

All promotional materials including brochures and online postings must be reviewed and approved by the Stanford Center for CME prior printing, posting and/or sending.

Key tasks include:
- Approve CME Application
- Create marketing collateral
- Create and open registration and course website
- Send invitations to intended audience
- Send faculty packets
- Collect all faculty documentation

Phase 5 - Course Delivery

During the last month prior to course delivery, preparation for delivery of the educational activity continues. At this stage all faculty disclosure forms must be received and reviewed. Should any faculty member have a conflict of interest, a non-conflicted course director, or his/her appointee, must resolve that conflict (typically by reviewing the faculty member's presentation and requesting edits as necessary).

Activity promotion and registration administration continue until a week prior to the course.

All presentation slides are submitted to the SCCME at least **four weeks prior to the activity** to provide sufficient time for their review by CME staff and the Course Director (as needed for resolving conflicts), edits, and inclusion in the syllabus if applicable.

On the date(s) of the course, onsite support will be provided and generally includes, at a minimum, the assigned CME Course Coordinator who will oversee registration, catering, venue logistics, and participant needs.

Key tasks include:
- Create syllabus
- Collect speaker presentations
- Review/modify presentations for ACCME rules, copyright and HIPAA issues
- Ensure receipt of all faculty documentation and resolution of conflicts
- Set up venue
- Provide on-site staff support for course delivery

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Phase 6 - Post Activity

After the course has been completed, it is evaluated to assess the impact of the education, which includes if learners were able to increase their competence or improve their performance, and if there was perceived bias. Expense settlements are submitted by faculty and final budget reconciliation is completed.

The CME Course Coordinator will compile all final documentation **within 60 days of the conclusion** of the activity, including the outcomes summary and final reconciled budget, and deliver the close-out package for accreditation review.

The CME Conference Manager will host a debrief meeting with the Course Director(s) and Planning Committee to review and assess the success of the program. For recurring courses, this process facilitates the needs assessment for the upcoming year.

Key tasks include:
- Email evaluation immediately post event to participants to assess impact of the education
- Complete expense settlements and reconcile budget
- Meet with Course Director(s) and Planning Committee to debrief
- Email performance evaluation 60 days post event to assess practice changes, as appropriate