

Example Conference/Workshop Timeline

12 Month Conference Timeline- Key Milestones:

Consulting Begins 1/2015, Approval for Commercial Support Sought March 2015, Application Accredited 4/2015, Marketing Begins 5/2015, Event Date 10/9-10/2015, Debrief 12/2015

Task Name	Q1 2015			Q2 2015			Q3 2015			Q4 2015			Q1 2016		
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar
1 Overall Activity Timeline															
2 <input type="checkbox"/> Phase 1: Consultation On Proposed Activity - Initial consultation and collaborative assessment of new activity concept															
3 Clarify goals of conference															
4 Review of six phase cycle of planning															
5 Backstop/Fee Discussion															
6 Commercial Support/In-Kind Process															
7 Review Roles and Responsibilities															
8 Critical Task - Decision to Certify or Not															
9 <input type="checkbox"/> Phase 2: Activity Pre-Planning - Establish Course Directors/Planning Committee Structure															
10 Establish Planning Timeline															
11 Assign CME Coordinator															
12 Establish Date and Venue															
13 Course Director and Planning Committee Established															
14 Course Director Responsibility Agreement Signed															
15 Gather Planning Disclosures, Resolve Financial Conflicts:RCOI Signed															
16 PTA Established															
17 Commercial Support and In-Kind Strategy Established															
18 Critical Task: Regular Planning Meetings Established															

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19 <input type="checkbox"/> Phase 3: Activity Planning- The CME Application facilitates and documents the planning process.															
20 Save-the-Date sent to CME Database and Added to CME Newsletter		█													
21 Review CME Application Components and How to Complete		█													
22 Identify Professional Practice Gaps (Current versus Best Practice)		█													
23 Venue Contract Negotiations (Site, Catering, AV, Parking, Transportation, Sleeping Rooms)		█													
24 Develop and Approve Marketing Plan		█													
25 Develop Course Content		█													
26 Develop Agenda		█													
27 Identify and Personally Invite Faculty (soft invite)		█													
28 Budget Developed, Reviewed and Approved by CME and DFA		█													
29 1st Draft of Agenda and CME Application developed in collaboration with SCCME		█													
30 Critical Task - 2nd Draft Review of Application (Prepare for final submission)				█											
31 Signatures of Course Director and Departmental Chairman Completed on CME Application				█											
32 Submit Internal Commercial Support Request as Appropriate				█											
33 <input type="checkbox"/> Phase 4: Activity Approval - CME application is reviewed/modified and given final approval and marketing is implemented															
34 Final Draft of CME Application Submitted for Approval				█											
35 Critical Task - Course Certified for CME				█											
36 Create and Open Registration and Course Website				█											
37 Create Brochure/Send to Designer/CME Approved				█											
38 Additional Marketing Collateral Completed and Approved				█											

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39 Critical Task - Marketing Plan Implemented (Invite Attendees)															
40 Send Faculty Packets and Begin Collecting Faculty Documentation															
41 Ongoing Meetings with Planning Committee as Needed															
42 Phase 5: Course Delivery	Phase 5: Course Delivery														
43 Continue to Collect Faculty Disclosures, Copyright attestation, and Ensure Resolution of Financial Conflicts															
44 Venue Set-Up and Orders Confirmed															
45 Critical Task - Collect and Review Speaker Presentations for ACCME, copyright and HIPAA rules															
46 Create and Approve Syllabus															
47 Create Badges and Attendee Packets															
48 Conference Evaluation Created															
49 Goal - Conference Date (On-site Staff Support)															
50 Phase 6: Post Activity Delivery - prepare to close the conference and set the stage for recurring courses	Phase 6: Post Activity Delivery - prepare to close the conference and set the stage for recurring courses														
51 Competence Evaluation Sent to Participants															
52 Complete Expense Settlements and Reconcile Budget.															
53 Goal - Course Debrief Meeting															
54 Performance Evaluation Sent and Complete															
55 CME Approved, Finance and Course Director Approval for Journaling and Closing PTA															