

Appendix

Section 7

Section 7: Chapter Programs and Meetings – *Planning for Success*

1. Planning schedule
2. Application for Joint Sponsorship and Category I Credit
3. Requirements for having an educational program approved for Joint Sponsorship
4. Council resolution 18 requesting “the sponsoring chapter to notify the state chapter at the time the decision is made to have a meeting in that state.”

PROGRAM PLANNING CALENDAR

Time Before Meeting

12 months (approx)

Task

Once the idea for a meeting occurs, appoint program chairperson and the planning committee.

Send national ACEP the General Application form, if not already on file (every 3 years). National ACEP will respond within 30 days.

Select tentative sites and obtain proposals.

Contact national education representative regarding the specific CME activity for planning input.

Confirm site selection.

11 months

Sign hotel contract.

Prepare budget.

10 months

Conduct a planning meeting and establish checklists for planning assignments. Be sure to include national education representative.

9 months

Send a reminder to planning committee members.

8 months

Order hotel reservation cards.

Finalize program schedule, faculty, educational objectives, and related activities. Include national education representative in all phases of educational planning.

Mail faculty contracts and faculty disclosure forms.

6 months

Select a designer/printer to produce promotional materials.

National education representative fills out Form A, *Report on Chapter Planning* (4-6 months before).

5 ½ months

Begin working with designer/printer on materials.

5 months

Begin reviewing faculty materials.

4 ½ months

Contact faculty not returning contracts and faculty disclosure forms. (Include conflict of interest statement in on-site materials.)

4 months

Order mailing labels.

Finalize faculty.

Chapter completes and sends national ACEP Form 2, *Joint Sponsorship of Specific CME Activity*, (within 60 days before course).

3 months	<p>30 days before printing brochure and all promotional copy, chapter submits promotional copy to national ACEP (national ACEP will fax approval/with any needed changes to chapter within two working days).</p> <p>Once approval is received, print and mail brochure.</p>
2 months	<p>Second mailing of promotional brochures to selected areas.</p> <p>Obtain and begin printing all syllabi materials.</p> <p>Conduct a final site visit.</p>
7 weeks	<p>Assign meeting rooms to schedule.</p>
6 weeks	<p>Make hotel reservations for staff, faculty, and VIPs.</p> <p>Order special equipment requested by faculty.</p> <p>Order guides from convention bureau.</p>
5 weeks	<p>Select shipping company.</p> <p>Order signs for all major activities.</p> <p>Send final letter to meeting registrants.</p>
4 weeks	<p>Order registration assistance from convention bureau (if needed).</p> <p>Mail final faculty letter with schedule.</p>
3 weeks	<p>Complete specification sheets for hotel.</p> <p>Complete meal function specifications.</p> <p>Call convention services manager to obtain shipping requirements.</p>
2 ½ weeks	<p>Prepare shipping labels.</p> <p>Prepare syllabi notebooks or packets.</p> <p>Pack all materials and supplies.</p>
2 weeks	<p>Prepare faculty checks.</p> <p>Ship materials to meeting site.</p> <p>Arrange for hotel pre-convention briefing.</p> <p>Schedule staff briefing.</p>
1 ½ weeks	<p>Conduct staff briefing.</p>

3 days

Confirm boxes are at meeting site.

Pack the following materials to take with you:

- faculty checks
- originals of all syllabi materials
- registration files
- meeting files

1 day

Conduct pre-convention briefing with hotel staff.

On-site

Implement meeting.

Arrange for return shipping.

After Meeting

1 week

Conduct staff wrap-up meeting.

2 weeks

Process evaluations.

Mail faculty thank-you notes.

3 weeks

Prepare evaluation report and distribute.

Within 60 days

Send national ACEP signed faculty disclosures, summary of evaluations, final and on-site schedule that includes the conflict of interest statement, brochure copy, attendance roster, all other promotional copy, and Letters of Agreement for educational grants from commercial supporters.

Requirements for Having an Education Program Approved for Category I Joint Sponsorship

Chapters wishing to conduct CME programs jointly sponsored with national ACEP must complete the General Application form (Form 1) and forward it to national ACEP's Educational & Professional Products Division. *(Note: The General Application form must be completed only once every three years.)*

The chapter immediately contacts the national education representative for planning input with the chapter representative.

The national representative completes the Report on Chapter Planning form (Form A) documenting his/her role in the planning of this CME program and submits it to national ACEP.

The chapter completes the Specific CME Activity form (Form 2) and forwards it to national ACEP's Educational & Professional Products Division **at least** 60 days prior to the course date.

The chapter **MUST** submit brochure copy and any promotional material for the CME activity to national ACEP for approval **at least** 30 days prior to printing to allow staff to review it for proper credit statement, communication of course objectives and target audience, and logo placement and usage (correct sponsor announcement and faculty disclosure statement). *(Note: If faculty disclosures have all been returned at this time, the complete conflict of interest statement should be included in the brochure. Otherwise, it must be included in the final on-site schedule.)*

If any promotional materials are printed and distributed without prior approval of content by the Educational & Professional Products Division, joint sponsorship may be denied for a period of two years.

Within 60 days after the program has been held, the chapter must submit a copy of the final brochure, the program evaluation summary, attendance roster, and signed faculty disclosure forms.

Specific instructions for the CME approval process can be found in national ACEP's *CME Handbook and Guidelines for Joint Sponsorship*. For assistance and additional information or clarification, please contact ACEP's Educational & Professional Products Division at 800-798-1822, ext. 3292.