

## Course Director Responsibility Checklist

	Responsibility	Time line
<input type="checkbox"/>	Complete an accurate and thorough <b>needs assessment</b>	<ul style="list-style-type: none"> <li>• <b>9 months to 1 year prior</b> to the proposed event a thorough Needs Assessment must be conducted to <b>accurately assess</b> if there is a <b>learning gap</b> and what it is.</li> </ul>
<input type="checkbox"/>	Develop a planning committee	<ul style="list-style-type: none"> <li>• <b>9 months to 1 year prior</b> to the proposed event a planning committee should be developed.</li> </ul>
<input type="checkbox"/>	Activity Development Application	<ul style="list-style-type: none"> <li>• Submit a completed and signed Activity Development Application <b>6 – 9 months prior</b> to the first date of the proposed CME Activity.</li> <li>• Directors seeking full services should submit application 9 months to 1 year ahead of time whenever possible.</li> </ul>
<input type="checkbox"/>	Pay service fee	Upon Activity Development Application approval and before any work begins on the program.
<input type="checkbox"/>	Faculty Disclosure for each person in a position to control content: (Planning committee members Course Director, speakers and anyone else that is in a position to control content.)	<ul style="list-style-type: none"> <li>• Disclosure forms from the <b>planning committee members and course director</b> are <b>due with the activity development application.</b></li> <li>• Disclosures for <b>speakers</b> and other are <b>due 2 Months prior to the CME event.</b></li> </ul>
<input type="checkbox"/>	Letters of Agreement (LOA) for review and signature to the OCME	The OCME shall be told of all educational grants that are being pursued and shall sign all LOA for educational grants. Ongoing.
<input type="checkbox"/>	Agenda building	<ul style="list-style-type: none"> <li>• <b>Preliminary agenda</b> should be submitted with the activity development application.</li> <li>• <b>Final agenda</b> should be 100% set 4-6- months prior to the event.</li> </ul>
<input type="checkbox"/>	Promotional materials	<ul style="list-style-type: none"> <li>• <b>Save the date announcements</b> should be developed and <b>sent 3-6 months prior to the event.</b></li> <li>• <b>Brochures</b> should be sent to the <b>designer and printer 5-9 months prior to an event.</b></li> <li>• <b>Brochures</b> should be mailed and <b>in mailboxes 18 weeks prior to the event.</b></li> </ul>
<input type="checkbox"/>	Course and Speaker Evaluations	<ul style="list-style-type: none"> <li>• Edit evaluation template to fit in with your activity.</li> <li>• Evaluations should be included in the course handouts</li> </ul>
<input type="checkbox"/>	Review education material (e.g., slides or handouts) ensuring they do not contain any advertising, trade names or product messages	<ul style="list-style-type: none"> <li>• <b>Prior to start of course</b></li> </ul>
<input type="checkbox"/>	Evaluation summaries	<ul style="list-style-type: none"> <li>• No more than <b>2 months</b> after the event is completed.</li> </ul>
<input type="checkbox"/>	Financial reconciliation	<ul style="list-style-type: none"> <li>• No more than <b>2 months</b> after the event is completed.</li> </ul>