

Continuing Medical Education (CME) Activity Planning Questions

We have compiled the following lists of questions to help guide you through the various steps required for planning a CME course and/or activity.

1. General

- What are the goals and objectives of the CME activity?
- Does this activity fit within our mission for CME?
- Will another organization be involved in planning this activity?
- What have you identified as problems or gaps in practice that your activity will address?
- What data do you have that supports that the problem or gap exists?
- Who is target audience?
- When and Where would you like the activity to take place?
- What is your source of funding for the activity?
- What fee would you like to charge the participants?
- What size audience would you like to reach?
- What geographic area would you like to reach?
- What role will the CME office play?
- Whom has the department identified to submit educational grants?
- Who are the CME contacts with whom we will be working?

2. Faculty

- Who has the background, credentials, and experience to communicate best as a speaker the goals and objectives of the course?
- Who will contact the faculty?
- Who will send confirmation letters to the faculty?
- Who will confirm titles, affiliations for brochure?
- Who will request Faculty Disclosure forms from the speakers and where should they be sent
- Where are speakers coming from, and what are their travel plans?
- If they are from out of town, will they need a hotel room?
- Who will arrange transportation and hotel?
- Will honoraria and expenses be paid?
- If so, when will they be paid, and what information will be required from speakers to process?



3. Agenda

- What topics will be discussed?
- How long will the presentations be?
- Who will make the opening remarks?
- What is the starting and ending time?
- How many breaks will there be, and how long?
- Will lunch, receptions or faculty dinner be part of your activity?

4. Promotional Brochures/Postcards/html/email blast

- What is the overall marketing budget?
- Will a brochure be designed or an invite letter?
- Will you be doing a save-the-date?
- How many promotional direct mail pieces will be mailed?
- Will you be renting email lists, society lists?
- What date should be targeted for potential participants to receive the mailing(s)?
- How long will it take for design and printing?
- What mailing lists will be used to reach the target audience?
- How long will the mail house take to process the bulk mailing?
- How long will the post office take once they receive the bulk mailing?
- What vendors are being used?
- Will you be doing multiple mailings/e-blasts?

5. Registration

- How can people enroll (via online, fax or mail)?
- How will registration be tracked?
- Who will receive the registration forms?
- Will there be a dedicated website for the activity?

6. Technology

- Will there be any special audiovisual requirements?
- Should the activity be captured for archiving on the internet?
- Who will do the Web capture?
- What will we get for the stated cost?
- Will CD-ROM, USB or URL link be produced?
- Will activity be videotaped?
- Where will it be hosted?
- Will you be using an audience response system?
- Will another polling mechanism be used?

7. Conference Space

- What size venue is needed?
- Has a suitable venue been reserved?
- Will you need a speaker ready room?
- Is the space ADA equipped and up to code?
- Will breakout rooms be needed and who will procure them?
- Will you require exhibit space for vendors?

8. Rentals

- What additional supplies will need to be provided by a third party (e.g., linens, tables, chairs, pipe and drape)?
- Who is the vendor?
- Who is coordinating the order, receipt, and return of all rentals?

9. Catering

- Will there be food service, and if so, who will provide it?
- Where will the dining areas be?
- Can the dining space accommodate the number of anticipated guests?
- What are the menu options and cost?
- What is included in the catering fee (service, clean-up, flatware, glasses, etc.)?

10. Syllabus

- Will you be providing attendee materials – syllabus, folders, etc.?
- What will be in hand-out materials: folders, CME page, writing pads, evaluation flyer?
- What type of materials should be in the electronic or printed syllabus?
- Available online for download, on USB drive?
- What is the deadline for speakers to provide material for the electronic or printed syllabus?
- Who will contact the speakers to request materials?
- Who is designing the electronic or printed syllabus?
- What is the budget?
- Who will coordinate the production and delivery of the electronic or printed syllabus?
- The syllabus must contain an agenda page, the acknowledgment page, and the faculty disclosures summary page?

11. Posters

- Electronic posters at the ISSMS – What information should be on the posters?
- What type of posters (agenda, commercial support, cover of brochure) would you like produced?
- Who will design and print the posters?