

Education Event Checklist for Speakers

1. **Communicate early and often with your contact from the event planning committee.**
 - a. **Fully understand the who, what, when, where, and why.**
 - b. **Commit to the learning objectives/outcomes. Don't adjust unless authorized to do so.**
 - c. Be clear on expected content, audience size, audience type, physical location of event, when you must arrive, lodging/travel, honorariums/per diem, dress, format of presentation, need for a bio sketch.
 - d. Know the timeline for when you must submit disclosures, slide decks, or other accreditation materials & submit these items BEFORE the deadline.
 - e. Confirm the type of presentation: lecture, panel presentation, book/journal club, large group, small focus group.
 - f. Type of facility and IT support.
 - g. If you are not the subject matter expert related to the event then let the planners know that someone else might be a better fit. Ensure you fit the event and the event is not morphed to fit you.
2. **Fully understand in detail what is expected of you.**
 - a. **Type of delivery format: lecture/podium, small group, panel, etc.**
 - b. **Type of materials needed by the planning team: PPT, handouts, lab materials...**
3. **Mark your calendar and make arrangements for transportation, if needed.**
 - a. Speakers sometimes forget they committed to an event and ask for last minute changes – don't be this speaker!!
 - b. If you do not keep your own calendar or make your own travel arrangements, notify the planners of the person who makes these arrangement for you.
4. **Return disclosures and other materials on or before requested date(s).**
 - a. **Disclosures are needed in order to provide Continuing Education (CE) credits.**
 - b. **Return disclosures when specified. Don't be the reason your session is not accredited!**
 - c. Materials not submitted in the appropriate timeframe specified by the planners may jeopardize accreditation for your presentation or the event as a whole. Planners must meet specific deadlines when accrediting events for CME, CNE, and other types of CEUs. Chasing speakers for required materials may be the largest headache for any planner.
 - d. Standards for different types of CEUs vary from accrediting body to accrediting body. Read the disclosure requirements fully and ask questions as needed.
5. **Create or modify your presentation.**
 - a. Everyone is busy, make every effort to ensure you have time to create and modify your presentation well within the timeline set forth by the planners.
 - b. If you decide to change presentation content, first check with the planners to see if the new direction is in line with the event's themes and needs.
 - c. If you are modifying an existing presentation, be sure to remove all references to prior attendees or past events. Sometimes it is easier to create a new presentation than to make sure you caught all the past references to other events or audiences.
 - d. Absolutely send your presentation to the planners by the date they specified.
6. **Prior to event, confirm information in item #1 and give the planner your contact information for the day of the event**
 - a. Your event contact should be communicating changes to you.

- b. Don't hesitate to reach out to the planner to verify and/all information. In most cases, the planners appreciate hearing from the speakers prior to an event because it confirms that you have their event on your radar and you are getting ready for the event.
 - c. Some speakers may want to confirm the layout and true number of attendees at the event. The facility and audience size may require changes to presentation style.
- 7. **If a destination event, letting your planners know when you arrive in local area prior to the event is appreciated.**
 - a. Communicate information related to the hotel where you are staying, especially if it is other than the event recommended hotel.
- 8. **If you must travel from the hotel to the event site then a 'dry run' to the site may help you avoid being late on the actual day of the event.**
 - a. Check out parking and confirm if you will have a reserved speaker parking spot or not at the event. Where is overflow parking, if needed?
- 9. **Verify expectations for you to remain after your presentation for Q&A or social matters.**
- 10. **Have a back-up plan & take advantage of practice time offered by the venue/event planner.**
 - a. Planners should confirm when they receive your presentation and/or other materials, however it is always a good idea to take your materials on a thumb drive or even hard copies of your materials in case there are technical difficulties at the event site.
- 11. **Execute your presentation as close to the plan as possible yet remain flexible. Don't change objectives, outcomes, or materials without written approval from the accrediting organization.**
 - a. With any luck, everything will come together nicely, and speakers will execute all planned events as previously discussed.
 - b. In many cases, the preparation phase is the most difficult part of the event. With excellent planning and adherence to timelines, it is show-time!
 - c. Stay on-time at each step, from arriving at the facility to ending your presentation.
 - d. Consider bringing your own water bottle or hard candies, if you have a lengthy event or anticipate dry mouth.
 - e. Keep your back-up materials close at hand. You never know when technology may fail!
 - f. Read the audience. Speakers will know if the audience has questions or if they may or may not understand the materials being presented.
 - g. Remain flexible to adjust the presentation should you lose the audience or feel that they are more or less advanced than the material being presented.
 - h. If you feel you are losing the audience then consider asking them questions / increasing audience engagement.
 - i. As previously mentioned, end your presentation on-time unless told differently by the lead planner.
- 12. **Enjoy your time with the participants! They are looking forward to hearing from you—the subject matter expert.**

Education Event Planning Checklist

Advanced Planning

The following steps can happen simultaneously.

- 1. Establish your planning committee based on individuals with expertise and the needs of the event.**

You are not alone and don't think that you must do everything yourself! Create a team to divide and conquer the task list. When creating a team, consider those with expertise in areas such as:

- Accreditation for Continuing Ed (CE) credits
- Party planning / organizational skills
- Subject Matter Experts (SMEs)
- Information Technology (IT) savvy personnel
- Marketing / Social Media
- Partners from professional associations and agencies

- 2. Determine your target audience & align with an event theme.**

Knowing your target audience is one of the most critical elements that will go into setting the event fees, topics, location and more. Consider the experience level of the audience. Is the audience comprised of students, new professionals, or seasoned teams?

- While a theme is not a requirement, it does help in advertising and setting a focus for the event.
- Larger events may have sub-themes or even break-out sessions focused on related topics.
- Make a list of preferred topics.
- Be sure to arrange for topics that cover mandatory requirements for the attendees.
- Have others in the planning committee review the topics for relevancy.

- 3. Determine mode of delivery: in-person, virtual, or hybrid/combination of the two (recorded or not recorded).**

- 4. Create your budget based on planned revenue from attendee registration fees versus expenses.**

- a. Prepare a projected budget of income received from attendee and sponsor fees as well as expenses paid for event venue rental, food, continuing education accreditation fees, Audio/Visual services and more.
- b. Plan to keep your event on budget, but also have a plan if your event should run over budget. Do you have a foundation endowment, a department willing to provide finance support if needed, sponsors/CE approved vendors, a professional society/relationship willing to provide financial support, methods to decrease expenses should registrations not pan out exactly as planned.
- c. Always confirm with the agency providing continuing education credits regarding potential funding sources. Different professions will have different requirements related to co-sponsor, vendors, and other financial sources which could be seen as crediting bias within the content of the materials and could void CEU awards.

5. Confirm event location and date of event.

- Look at other industry-related event dates to be sure your event will not conflict with others.
- Look at religious and local holiday dates to maximize participation.
- Review academic calendars and timelines.
- It's vital to also work with event venue to determine the best dates for your event.
- Parking: Does your location have complimentary parking?
- Shuttle: If meeting location is off-site, is shuttle service available? Is there airport shuttle service?
- Misc Fees: Does the venue rental fees cover misc. equipment rental, are deposits required, host facility personnel support fees, contracted meal service, IT support, minimum fee per event or person?
- Past Feedback to Guide Current Choices: If available, review past event feedback in help to determine event date and format based on inputs from past audiences.

6. Secure legal permissions and contracts for event hosting.

These permissions may need to come from the head office of an organization or from the Dean of the College, for example. Know who is the appropriate person to sign legal agreements/contracts for your event, sometimes legal documents must be reviewed and approved by someone other than the planning committee.

7. Obtain professional accreditation(s) for Continuing Education (CE) credit.

- a. Determine who is the appropriate continuing education accrediting entity.
- b. Count on this as being one of the three most pricey items in your budget. Accrediting event topics is not required, but it is often expected. Your attendance may wain and you may see the angry 'beast' in attendees when they attend, but do not receive CE credit.
- c. Continuing education accrediting services are available from many entities—both local and national. Request bids from many to determine who can provide the best service for you and at the best price.

Early Planning Stage

(Many of these steps are "as needed or as appropriate")

1. Construct the presenter agreement, solicit/confirm presenters & then devise the event schedule.

- a. Determine the honorarium for speakers.
- b. Determine submission deadline for slide deck and other topic information.
- c. Be sure to include a disclosure section.
- d. Select a Key Note Speaker.
- e. Select all applicable speakers.
- f. Create a backup plan, should a primary speaker need to dropout of the event.
- g. The event schedule will likely go through many revisions. Format a preliminary schedule to determine meeting times, social activities, breaks, etc. This will help you determine the number of presentations needed.
- h. Determine if you will provide CE credits for all, some, or none of the events on the schedule.

- i. Can a speaker present multiple sessions or is it beneficial to have one speaker linked to just one event? There are benefits and drawbacks to speaker-sharing across multiple events.
- 2. Solicit vendor/exhibitor support and participation.**
- 3. Determine food menu: beverages, snacks, meals & confirm caterer.**
 - a. What is the budget? Food and beverage can be one of the biggest expenses.
 - b. What meals will be included for attendees in the event fee?
 - c. Will you serve snacks?
- 4. Determine IT support & associated costs.**
 - a. Does the event site provide IT support, or must the planning committee provide the IT support?
 - b. What level of IT Support is needed? Is your event going to be recorded for future use?
- 5. Select hotel & negotiate to reach an Agreement on services.**
 - a. Many events take place under one roof. Some events, such as those hosted at the University, hold the meetings within the University and provide a 'hotel of choice' referral to event attendees.
 - b. Hotel selection is a refined task that is not for the first-time event planner. There are fees to negotiate and fine print Agreements to be certain meet your exact specifications. A mismanaged hotel Agreement can break your bank. Be careful.
 - c. Participants and/or speakers needing a hotel will either ask if the event will cover the fees or if a decreased/group rate is available to use.
 - d. Rule of thumb: Stay in the hotel before signing the Agreement. Never book a hotel for attendees if you are not happy to stay in.
 - e. Once the Agreement is in place, communicate with the hotel on a regular basis to get periodic updates on their registered guest list.
 - f. It doesn't hurt to ask the hotel if other major events are occurring at the same time as your event. It could help to know if a massive wedding or party is happening at the same time as your event.
- 6. Arrange social events such as a welcome reception or after event social mixer.**
- 7. Open Event Registration for Attendees & Update event information on applicable website**
 - a. What fees will you charge? Take a look at budget projections to be sure your cost of venue rental, food, CE accreditation, speaker honorarium, advertising, etc. are covered with attendee fees and any sponsorship gifts.
 - b. Some events may require the rental of simulation spaces, standardize patients' fees, cadaver rental, procurement of pig parts for clinical demonstrations, etc. Realism in training and hands-on training are benchmarks for in-person events.
 - c. How will attendees pay the fee and register for the event? Create an online registration form with a link to pay the fee.
 - d. Consider whether professional associations or state agencies will consider offering scholarships / refund attendees after attending the event.
 - e. Be sure to include an emergency contact information request on the registration form in the rare event of an accident where a significant other needs to be contacted.
- 8. Advertise! Communicate! Spread the Word!!!**

Mid Planning Stage

1. Gather volunteers to help on event days:

- Someone to staff the sign-in/registration table
- Greeter(s)
- Social Activities
- Food service
- Clean up

2. Communicate *Need to Know* information to attendees, including accommodations info.

- a. What is the dress code?
- b. Directions to meeting, social activities, etc.
- c. Test your directions using various types of GPS devices to ensure the automated maps are correct.
- d. Accessible parking and American's with Disabilities Act access is a major consideration. Everyone should be welcome and able to attend the event.
- e. If serving lunch or snacks: Special dietary needs are increasing. Consider vegan, vegetarian, and other dietary options. Avoid foods with nuts.

3. Organize Ancillary Support: Parking, Shuttle, Housekeeping, Security, Administrative

- a. If holding the event at the University, schedule ECHO recording
- b. Reserve Parking and/or confirm shuttle services
- c. Schedule event with housekeeping, environmental services, IT, and security
- d. Assign duties to all involved. Be sure the lead planning is not responsible for all the tasks and has room to flex to other tasks should issues arise.

4. Prepare program information & send to printing.

5. Check in with your accreditation entity & speakers to confirm items are in place.

6. Create backup plans and continue to work with CE team.

Nearing the End Planning Stage

1. Prepare speaker introductions using bios.

- a. Who will introduce each speaker?
- b. Does the person introducing have a personal connection to the speaker? This can help make for a more natural introduction.

2. Make name badges for attendees and event staff, attendee sign-in sheets, handouts, etc.

3. Confirm services such as caterer and IT.

- a. Be sure security is aware of the unlocks needed.
- b. Environmental Services may need to know about the event to adjust heating/cooling.
- c. Housekeeping needs to know to provide extra services. At minimum request additional trash cans and multiple walk-throughs to ensure bathrooms are stocked and clean.

Days prior to event

1. Room & exhibitor set up.

- a. Sound check the AV
- b. Set up tables for any exhibitors. Exhibitors should be pre-approved through the CE accrediting body. Accrediting agencies have very specific requirements for sponsors, vendors, exhibitors, etc.

2. Offer speakers the opportunity to practice in the meeting room. Exchange cell numbers.

Day of Event

1. **Post directional signs to help attendees find their meeting room.**
2. **Final room set-up, test everything.**
 - a. Adjust the camera(s) to record to your preference.
 - b. Tape off area on floor where presenter must stay inside for best filming, best audio and best attendee viewing.
 - c. Try to provide the speaker with a preview screen for their presentation.
 - d. If a clock is not clearly visible to the presenter, then make sure someone from the event staff is available to give the speaker visual cues as to how much time remains.
3. **Show up in the best possible way by being well-rested and well-prepared. Don't do everything yourself.**

Post Event

1. **Hold a lessons-learned meeting with planning committee to review and document feedback.**
 - a. Discussion items are key in planning the next event to build upon successes and fix the not-so-successful elements of the event.
 - b. Review feedback from participants.
 - c. Document findings from this event so that whoever runs the next events has an excellent starting point.
 - d. Many continuing education accrediting organizations will require that the next organizer develop outcomes / objectives based on past feedback—an accreditation standard.
2. **Send thank you messages and store lessons learned for the next planning team.**