

CHECKLISTS FOR JOINT PROVIDERSHIP of EDUCATION ACTIVITY

*The following checklists and forms are your guides to accreditation compliance for education activities that are jointly provided by ASPEN Primary checklist may reference second-level checklist or specific forms for specific tasks such as syllabus production. PLEASE help us keep our accreditation status by fulfilling your contractual obligations. The Chapter CE Handbook has a wealth of information for you to ensure compliance.*

**Step 1.**

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| **√** | ***TASK*** |
|  | Form an interprofessional planning committee including at least one dietitian, nurse, pharmacist and physician. **Planning committee members cannot be employed by ineligible companies/industry/commercial entities**. * Collect contact information, disclosures and CVs
* Save all planning committee meeting minutes
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|  | Submit a letter of intent to apply for joint providership. Minimum requirements* Name and mission of requesting organization
* Description of the program including anticipated date, time and location of the event
* Names and contact information for planning committee members
* Conflict of interest disclosure statements and CVs for each planning committee member
* Preliminary program budget including projected revenue and expenses
* Submit by predetermined deadline based on timing of the event
* There should be no discussions with industry about the event and planned content
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|  | Keep **minutes of planning committee** meetings, emails, and other documentation of the planning process and submit to ASPEN |

Step 2.

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| ***√*** | ***TASK*** |
|  | Continue event planning* Include ASPEN liaison on the event planning communications – this is a member of the ASPEN Education and Professional Development (EPD) Committee
* As a committee, conduct the needs assessment and complete a practice gap analysis.  **Document all.**
* Develop event goals and objectives
* Plan the event
* Select and invite faculty
* All planning work should be documented (including minutes) and maintained in files for later submission to ASPEN

Submit your proposed program to ASPEN for review by the Education & Professional Development (EPD) Committee according to appropriate deadline* Complete the Chapter Proposal for Education Activity Form in its entirety
* Include CVs for speakers and planning committee members. Ensure proper speaker selection practices were adhered to – refer to handbook
* Include conflict of interest disclosure statements for all speakers and planning committee members (if changes based on what was submitted in letter of intent)

Upon agreement by the committee to jointly provide the proposed educational activity, * Sign your **contract** with ASPEN and return it to the national office.
* Submit $750 program fee with the signed LOA
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**Step 3.**

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| ***√*** | ***TASK*** |
|  | Event Logistics (upon approval/acceptance of joint provdership)* Create a pricing structure for the event – include member and nonmember fee structure and exhibit pricing. Submit to ASPEN with detailed event description for creation of the event to accept registration
* Create a refund and cancellation policy to be adhered to by chapter leaders and ASPEN staff
* Develop marketing materials (brochures, flyers, emails, websites, etc.) while adhering to the accreditation standards described in the handbook. Chapters are encouraged to do marketing materials early on in the process – recommend 3-4 months prior to the event for ample marketing time. **(See additional program materials check list)**
* Submit all marketing materials to ASPEN staff for review before sending out or publishing
* As desired, work with industry partners to obtain support for the program. ASPEN does not secure industry support for chapter events
* Obtain LOA from all industry partners (this does not include exhibitors) and submit to ASPEN for CEO or COO signature once signed by chapter president and industry partner. These LOAs must be fully executed prior to the event, no exceptions.
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|  | Finalize **time schedule** – submit to ASPEN |
|  | Develop Event Materials – minimum is a conference program* **(See additional program materials check list)**
* Provision of copies of slides to attendees is not required
* Submit syllabus to ASPEN **45 days prior to the event** for review
* Submit edits to event evaluation to ASPEN **60 days prior to event**
* Submit post test questions, if desired
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**Step 4.**

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| ***√*** | ***TASK*** |
|  | Speaker Management* Obtain speaker release
* Obtain speaker disclosure information (if changes to what was submitted with proposal)
* Obtain speaker CV (if changes to what was submitted with proposal)
* Obtain signed speaker contract
* Provide speaker contract that specifies reimbursement policy, honorarium (if used). Provide instructions that define desired teaching methods such as active participation in the learning – presentation level & target audience – topic and time restrictions - requirements/deadlines for submission of syllabus and presentation materials (including presentation objectives, outline or summary, reference list, self-assessment questions/answers or case study, PowerPoint slides)
* Collect slides from speakers review for formatting and inclusion of commercial bias (planning committee members and staff to review. ASPEN will need a final copy of the presentations whether or not they are provided to attendees). **First draft of slides due 6 weeks (~45 days) prior to the event.**
* Facilitate presentation slide edits with speakers **(allow ample time for speakers to make revisions)**
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|  | * Estimate audience size, insure **facilities** will accommodate attendees
* Design Audio/Video set up
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|  | * Ensure comfortable learning environment for all attendees
* Ensure that NO promotional activity occurs in the same room as the educational activity.
* If a commercial product must be used in a presentation (as for an equipment demonstration), place a sign near the equipment that says “ Presence of this (PRODUCT) does not imply endorsement by any accrediting organization”. Document this sign.
* Provide sign in sheets or check off pre-registration list INCLUDING discipline of each attendee (REQUIRED!). Account for on-site registrations as well.
* Have laptop at registration to allow walk-ins to register online via ASPEN's online store
* Distribute Course Syllabi
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**Step 5.**

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| ***√*** | ***TASK*** |
|  | * If necessary, submit to ASPEN any registration forms and checks for onsite registrations. **(Try to avoid this step by having walk-ins register through ASPEN's online store at the event)** Should be done immediately after the event.

**Submit the following to ASPEN 30-45 days post event*** Income and expense statement (budget vs. actual)
* Attendance roster per discipline as compared to registration numbers
* Copies of all files pertaining to program development, marketing, execution and follow up.
* **If not previously submitted. Note, if these were not submitted prior to the event, the chapter risks not being able to partner with ASPEN for future event.**

Faculty disclosure forms, contracts, release (if applicable), CVs. Committee minutes Final Syllabus with program outlineFinal presentation slides from speakersCommercial support contracts – signed.Resolution of any conflict of interest for speakers and planning committee members |