**Annual Timeline and Chapter Responsibilities**

1. **Annual Timeline and Chapter Responsibilities**

One of the most important components of planning is **allowing enough time in advance of the educational activity to accomplish all the steps necessary to produce a CE compliant program** for four different disciplines. To ensure both ASPEN and chapters can meet all requirements of the four accreditation bodies, the following submission timeline has been established and must be adhered to annually.

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| --- | --- | --- |
| **Event Dates** | **Letter of Intent Due on or Before**(8 – 10 months prior) | **Proposal Due on or Before**(5 – 7 months prior) |
| **January, February, March** | May 1 | August 1 |
| **April, May, June** | August 1 | November 1 |
| **July, August, September**  | November 1 | February 1 |
| **October, November, December** | February 1 | May 1 |

Additionally, there are several other important dates and details to keep in mind to stay on track with planning, documentation, and implementation of the event. Adhering to this timeline will help Chapters give planning committee members and speakers ample time to assemble required resources and documents for a successful program. **Missing components will delay program approval and could result in ending the joint providership relationship between ASPEN and the Chapter**. It is therefore imperative that all required documents and resources are submitted to ASPEN within the timeframes listed below. Following these lists, further along in the handbook is a detailed description on program development, checklists and sample forms to assist the chapter through the entire process.

| **STEPS TO OBTAIN CE** | **DUE BY** | **REQUESTING ORGANIZATION RESPONSIBILITIES** |
| --- | --- | --- |
| **Before Program is Approved** |
| **STEP 1- Letter of Intent****(refer to Step 1 folder for guidelines, forms and samples.)** | **8-10 Months prior to the Event (refer to Chart above for specific dates)**  | * Review materials and timeline provided by ASPEN
* Form a planning committee for the annual event. *Planning committee must include a dietitian, nurse, pharmacist and physician. ASPEN can facilitate the placement of one of these members if the Chapter has trouble finding someone.* **Planning committee members cannot be employees of ineligible companies/commercial entities/industry.**
* Submit a letter of intent to apply for joint providership to ASPEN Letter of intent should include at *minimum:*
	+ the name and mission of the requesting organization;
	+ brief description of the program including anticipated date time and location of the event;
	+ names and contact information of the planning committee members;
	+ conflict of interest disclosures for each of the planning committee members
	+ CVs for each member of the planning committee;
	+ a preliminary budget for the program.
	+ Attestation that chapter leaders involved with the program are familiar with the timelines and consequences of non-adherence
* Submit letter of intent according to the annual timeline based on when the event will be offered.
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| **STEP 2- Program Proposal****(refer to Step 2 folder for guidelines, forms and samples.)** | **5-7 Months prior to the Event (refer to Chart above for specific dates)**  | * Planning committee members and the EPD committee member liaison to collect and analyze practice gap information and subsequently develop event goals and objectives, plan the event, identify speakers, etc. Note: EPD committee member liaison is not a working member of the planning committee, but an advisor. *All meeting minutes need to be saved to be provided to ASPEN*
* **NOTE: at no time during this planning phase should there be any discussions with any members of ineligible companies/industry about the event. Individuals in industry may not provide suggestions for topics, speakers, etc. Industry employees cannot serve as speakers or have any involvement in the planning and implementation, no exceptions.**
* Once the event is planned and speakers identified and invited, complete a proposal to submit to ASPEN by the deadline noted in the annual timeline. Submission should include
	+ the proposal
	+ faculty conflict of interest disclosures
	+ faculty CVs
* Proposals submitted after the deadline will not be considered.
* Upon approval of the program, Chapter president or designee to work with ASPEN to complete the LOA for the joint providership.
* With a signed LOA, chapters will be required to submit the $750 program fee for the joint providership.
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| **Once a joint providership agreement is established**  |
| **STEP 3- Marketing Materials****(refer to Step 3 folder for guidelines, forms and samples.)** | 5 Months Prior- Pricing Structure and Brochure45 Days Prior- Onsite Materials | * Create pricing structure for the event and submit the information to ASPEN. Chapters need to implement a member/nonmember fee structure. Chapters should consider increasing the fee by $10 for management of the program.
* Include exhibitor fees and if exhibitors will be allowed to claim credit, please specify how many individuals will be allowed to claim per exhibit.
* Develop marketing materials (brochures, flyers, emails, websites, etc) while adhering to accreditation standards as described in the handbook provided by ASPEN.
* Submit drafts of the materials to ASPEN staff to review and provide guidance. (These documents go through several rounds of revisions. Allow ample time for review and completion by deadline.)
* If desired, work with industry partners to obtain support for the program. Chapter leaders are responsible for securing their own industry support. ASPEN staff will not assist with this process.
* Obtain a LOA from all ineligible companies/industry partners (this does not include exhibitors, those are a separate agreement) for support received. Submit completed and signed LOA to ASPEN for final CEO signature. *The LOA should be signed by the chapter president and the industry partner before final signature by the CEO is added.*  **All LOAs must be fully executed by all parties prior to the event, no exceptions.**
* Participate in conference calls to review rules for industry activities.
* Create conference materials – at a minimum each attendee should receive a conference program which includes
	+ documentation of support received
	+ a description of the program with the sessions and speakers listed
	+ CE information
	+ speaker and planning committee disclosure information.
	+ many chapters also like to provide speaker handouts to participants prior to the event
* Final packet must be approved by ASPEN at least 45 days prior to the event.
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| **STEP 4- Speaker Management****(refer to Step 4 folder for guidelines, forms and samples.)** | Continuous from planning through implementation of event | * Speaker management as directed by ASPEN and the speaker packet.
* Collect slides from all speakers, ensure slides comply with the slide template. Planning committee members, EPD liaison and staff to review slides for any sign of commercial bias.
* Facilitate slide presentation edits with speakers.
* Provision of presentation slides to attendees is not required. However, the chapter should maintain a copy of the slides to submit to ASPEN for accreditation purposes
* If presentation slides are not provided to attendees, recommend providing the outlines speakers complete to attendees.
* Submit edits to event evaluation to ASPEN (must be approved with the rest of the on site materials)
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| To Do Onsite |
|  |  | * Register any walk-ins via ASPEN online store if possible (will need a laptop and internet access to complete.)
* If onsite registrants prefer to pay by check, complete paper registration forms and collect and send all paper/check registrations to ASPEN office immediately upon the conclusion of the event.
* Create and retain sign in sheet of all attendees for each day of the event.
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| **Upon completion of the event** |
| **STEP 5- Finances and Documentation****(refer to Step 5 folder for guidelines, forms and samples.)** | 30 Days Following Event Conclusion | * Submit final paperwork to ASPEN within 30 days of completion of the event. This includes but is not limited to
	+ full attendee registration list
	+ information for onsite registrants
	+ copies of all planning meeting minutes
	+ speaker presentations
	+ financial/budget documentation, etc.
* Submit final event expense report within 60 days of completion of the event.
* Provide ASPEN with any additional documentation to maintain accurate files of the event from planning through implementation.

*Failure to comply with post event documentation will result in chapter event fees being withheld and may compromise the ability of the chapter to partner with ASPEN in the future.*  |