

Educational Activity Planning Timeline Worksheet

For your Educational Activity Planning, we recommend that you use a project tracking chart.

Planning Activity	Timeline	Projected Completion	Actual Completion
I. Assessment			
<ul style="list-style-type: none"> Identify Learning Needs 	6-12 months prior		
<ul style="list-style-type: none"> Determine Target Audience 	6-12 months prior		
II. Planning			
<ul style="list-style-type: none"> Select Planning Committee 	6-12 months prior		
<ul style="list-style-type: none"> Define and Assign Roles & Responsibilities of Committee Members 	6-12 months prior		
<ul style="list-style-type: none"> For the Educational Activity Identify: <ul style="list-style-type: none"> Purpose Theme Objectives Content Outcomes 	6-12 months prior		
<ul style="list-style-type: none"> Select: <ul style="list-style-type: none"> Date Time Facility/Location 	6-12 months prior		
<ul style="list-style-type: none"> Create Budget 	6-9 months prior		
<ul style="list-style-type: none"> Select & Confirm Speakers 	6-9 months prior		
<ul style="list-style-type: none"> Finalize Activity Agenda/ Grid: Including course description, title of each lecture, content and teaching methods. 	3-6 months prior		
<ul style="list-style-type: none"> Submit Educational Activity Proposal for CEs 	3-6 months prior		
<ul style="list-style-type: none"> Develop Marketing Plan 	3-6 months prior		
<ul style="list-style-type: none"> Design Brochure, prepare mailing list and mail brochures 	3-6 months prior		
<ul style="list-style-type: none"> Develop Course Materials 	1-3 months prior		
III. Implementation			
Prior Coordination			
<ul style="list-style-type: none"> Contact Speakers to review all materials and forms are submitted 	1-3 months prior		
<ul style="list-style-type: none"> Contact Facility to Confirm Room Set-up, Menu, etc. 	1-3 months prior		
<ul style="list-style-type: none"> Ensure all Course Materials are uploaded 	1 week prior		
<ul style="list-style-type: none"> Meet with Planning Committee to review timeline and assigned responsibilities 	Ongoing		
On-Site Coordination			
<ul style="list-style-type: none"> Arrive Early: 	Day of Activity		

<ul style="list-style-type: none"> ○ Check In with Facility Coordinator ○ Review Room Set-Up ○ Check AV Equipment, including media used in presentations ○ Set-up Registration Area ○ Post Wayfinding Signs ○ Recognize Presenters and assist them with any AV needs 			
<ul style="list-style-type: none"> ● At Conclusion of Educational Activity: <ul style="list-style-type: none"> ○ Open Evaluation, email out any links ○ Explain to learners how to collect contact hour certificates ○ Return any borrowed equipment 	Day of Activity		
IV. Evaluation			
<ul style="list-style-type: none"> ● Reconcile paperwork as needed for contact hours 	1-2 weeks post		
<ul style="list-style-type: none"> ● Finalize Budget & Pay Bills 	1-2 weeks post		
<ul style="list-style-type: none"> ● Send Speaker(s) Letter of Appreciation & Summary of Evaluations 	2-3 weeks post		
<ul style="list-style-type: none"> ● Conduct a Post-Educational Activity Debrief with the Planning Committee 	3-4 weeks post		