

Chapter Event Check List

Setting up the Event

Date/Time/Venue

1. **Chose a time, date, and venue.** Keep in mind your AV needs. You will need a projector, projector screen, microphone, and speakers.
Note: If your average attendance is less than 50, choose a venue other than a hotel such as a restaurant that has a private party room, a community center, or a hospital. Mariel will SIGN ALL CONTRACTS.
2. Your responsibilities include:
 - a. Making a note of all deadlines. When are your final numbers due? When are your menu choices due?
 - b. Keeping a copy of all receipts and sending to Mariel after the event.

CE Topic

Option 1: Use a ready-to-go program. For a list, [click here](#).

Option 2: Create your own CE program. If creating your own CE content, be sure to fill out the following:

- a. CE Program Outline
- b. CE Application
- c. CE Disclosure

Once the material is reviewed by the CE Committee, Mariel will let you know that we may move forward planning your event.

Documents needed to be completed by speaker whether using Option 1 or Option 2

- a. Speaker Bio
- b. Speaker Disclosure
- c. W9 (if offering an honorarium – max \$250 per speaker)

Chapter Support

1. **Sponsorship.** There are specific sponsorship policies in place for PCNA chapters. A fee is charged to the sponsor if they plan to host a product theatre or exhibit. If they are hosting a product theatre this is considered a Commercial event. CE presentation(s) must be part of these events in order for the event to be considered a PCNA chapter program. Please read below for the specific PCNA sponsorship policy.
 - a. Sponsor will pay a flat fee to the PCNA National Office. This fee will cover PCNA National office time (CE review, financial management, etc.), AV charges, food and beverage, and speaker honoraria.
 - This means that *the sponsor will NOT pay the restaurant bill directly*. The sponsor would send the National Office a check directly. PCNA National would pay for the restaurant deposit and bill.
 - b. The Chapter alone is responsible for creating the content for the CE portion of the program or selecting from content PCNA National has to offer. The sponsor may not weigh in on subject matter, content, or speaker choices for the CE portion of the event.
 - c. PCNA cannot provide CE credit for programs created by a sponsor or other organization. AANP is very clear/strict about PCNA's CE status as an approved provider, not an approver of CE. PCNA is able to provide CE for only programs/talks developed by PCNA.

Marketing

1. Mariel will set up your chapter webpage, event registration, and invitation email. Your responsibilities include:
 - a. Review draft of invitation email in timely manner to ensure the initial email goes out no later than 30 days prior to the event (typically one email will go out 2 months, 1 month, two weeks, and 1 week before the event, and then a final email to those who just registered as a reminder).
 - b. Fill in [flyer template](#) with your program's information and post at your place of work

- c. Check in with Mariel to get updated registration numbers

Prior to the Event

Patient Education

Do you need more membership brochures? More copies of patient education materials? Please let Mariel know at least 10 days prior to your event. Chapter meetings are an excellent time to encourage others to join or renew.

CE Certificate

Chapters will receive an updated sign in sheet prior to the event. Attendees will sign this sheet and you will send the sheet back to Mariel. Rachel will then email all those who actually attended the program and provide a link for them to fill out their Evaluation Forms online in exchange for an electronic copy of their CE certificate.

At the Event

Sign-In Sheet

Make sure all attendees sign the sign-in sheet. If someone didn't pre-register make sure they write their email legibly or we will not be able to send the CE information after the event. It may be a good idea to remind people that they will need to have an account with PCNA in order to obtain CE. It takes 2 minutes to create an account with PCNA and it is free.

Member Engagement

Be sure to introduce yourself to all attendees and encourage them to get involved in the chapter. Summarize past chapter events and mention different way to volunteer (as a speaker, helping at the sign-in table, helping spread the word about the chapter, developing CE content, etc.). Chapter meetings are excellent for networking but also for finding and developing future leaders.

After the Event

Mail/Fax/Scan and Email to National Office

- a. Sign in Sheet
- b. Receipts
- c. Reimbursement Forms (if applicable)