Event Planning Checklist for Continuing Education Activities, Conferences, and Other External Activities (Office of Practice and Strategic Initiatives)

☐ Event discussed with Dept. Chair (budget impact, schedule impact, alignment with personal/dept./College/university strategic goals and plan) and written approval received

☐ Review event with Office of Marketing and Communication and Office of Practice and Strategic Initiatives and approved for execution.

☐ Type of activity:
Conference, workshop, symposium, lecture etc.

☐ Event Tier:
See Event Tiering and Lead Time

☐ Single day? Multiple days?:

☐ Sponsoring CHHS Department:

☐ External Co-sponsors (if applicable):

☐ Tentative Title and Description:
Target Audience:
Professionals? Students? Public? Other?

Estimated Attendance:

Purpose of Activity (attach)

Objectives (attach)
Overall, separate sessions if applicable

Outcomes (attach)
Overall, separate sessions if applicable

Planning Committee Members:

Tentative Speakers:
CVs required before conference begins; transcripts also required if Mason course credit given

Responsible party/parties:
Person or persons responsible for room reservations, A/V equipment, parking services, on-site coordinator at event, catering etc.

Evaluation Mechanism (attach):
Evaluation documentation is required if Contact Hours are given

Will Contact Hours be awarded?:
By Mason or through external association by co-sponsors?

Estimated Costs (attach)
All university policies for vendors and ordering must be met. Include:

Speaker(s) (paid, honorarium, gratis?)
Food/beverages
Handouts or other supplies/materials
Evaluation forms (paper, online?)
CE certificates (currently $25 per attendee)
Parking charges (speakers, attendees if covered)
Room charges (if event co-sponsored with external group)
Additional marketing costs (external logo approval, external advertising sources)

☐ Cost center(s) to be used for charges (dept., grant if for dissemination):
Most purchasing requires cost center information, even if event is self-sustaining
EVA vendors must be used or justification otherwise (same as per any dept. ordering)

Pricing
Every event, even if non-credit or non-CEU bearing, generates costs. In addition to direct costs such as supplies and catering, indirect costs such as time and effort for marketing, establishing payment portals, and evaluating, supplying, and tracking credits/contact hours are also involved.

Revenue-Sharing
For non-credit events (e.g., continuing education, conferences), 50% of the event revenue will be retained by the College to cover indirect and direct costs incurred. These include the time and personnel required to market the event, set-up payment portals and monitor registrations, evaluate event time for any continuing education credit given and track required documents, and other indirect costs assumed by the College. The department hosting the event will retain 50% of the event revenue minus the direct costs. This ensures budgets are carefully considered in advance, and appropriate pricing for the event is implemented from the beginning. An interactive spreadsheet
is included as a tool to estimate event costs and revenue.

For occasions in which a CHHS department is sponsoring an external organization’s event, all resulting costs should be covered by the external organization, including the cost of any room rental fees at Mason (e.g., Johnson Center rooms, AV equipment). For those events not entirely covered by the external organization, the department hosting the event is responsible to cover any additional costs. The College is not responsible for covering any additional costs incurred.