



May Owen, MD, Outreach Program | Checklist & Timeline

Timeline

- Submit [application](#): applications will be reviewed and approved by a select committee the first Thursday of the first month of each quarter
- Submit post event [report](#)

Checklist

Getting Started

- Choose event type, such as networking, presentation with or without CME, luncheon.
- Select event date, time, and location.
- Identify who will be invited: members only/members and nonmembers.
- Develop projected budget of expenses.

Expert Tips:

- Does your County Medical Society have a designated time for events?
- Consider time/day of week that works best for your audience -- avoid conflict including religious holidays, legislative conflicts, other events
- Work with your leadership team to execute a plan

Event Logistics

- Complete and submit the [grant application](#).
- Check your email for approval and amount of funds granted.
- Identify the speaker, program objectives, and CME information, if applicable.
- Determine room requirements and audio-visual needs.

Expert Tips:

- Work with the venue for menu options and identify and accommodate dietary restrictions
- If applicable, collect speaker bio, headshot, presentation, and handouts
 - Secure speaker recognition and/or thank you item

Promoting Your Event

- Create invitations – emails and flyers – using the templates TMA provides
- Distribute marketing materials, invitations, and post any social media content

Expert Tips:

- Provide specific details on your invitation such as: location, date, time, and RSVP information
- Include sponsor and TMA & TMAIT logos on all marketing collateral

Event Prep

- Track RSVPs and prepare registrant list
- Secure branded swag from TMA
- Ensure PPT slides and signage display sponsor logo and thank you to TMAIT
- Create name badges and sign in sheets
- Collate giveaways and handouts including branded swag from TMA and/or TMAIT
- Prepare event evaluation and CME include information if applicable
- Monitor and track income and expenses

Onsite

- Check site/facility set-up (audience seating, head table, sound system, registration area)
- Post room and registration area signs and including TMAIT sponsorship signage
- Orient speakers to use of sound system, AV equipment, and lights and troubleshoot questions
- Conduct on-site registration (including walk-ins), distribute registration packets including TMAIT swag and name badges
- Provide evaluation forms/CME information if applicable
- Take photos for follow up requirements
- Thank TMAIT for their event sponsorship at the beginning and end of the event.

Expert Tips:

- Remember to welcome participants and speakers.
- Be sure to inform your audience and speaker if recording and photographing the event
- Provide speaker thank you/gifts if applicable

Post Event

- Submit the follow up [report](#) and event photos
- Send thank you letters to speakers, guests and TMAIT.