

## **CLE Course Planning Deadlines**

### **6-12 months before event**

- Decide where to go. We will bid up to 3 locations and 3 dates.
- Send out request for proposals and negotiate your contract.
- Book your event.

### **4-7 months before event**

- Planning Meeting.
- Plan Course.

### **4-6 months before event**

- Topics and speakers confirmed (Agenda).
- Event goes online and “mark your calendar” e-blast sent.
- Program confirmed. Start brochure.
- Notify speakers, presenters and panelists of deadlines.
- Create online registration.

### **3-4 months before event**

- Finalize brochure.
- E-blast full event. Online registration opens.
- Notify speakers & council members to book their guest rooms.

### **2 months before event**

- E-blast again.
- Materials reminder for speaker, panelist and presenters.
- Provide room set-up, a/v and initial food orders to hotel.
- Order Flash Drive and Name Badges.
- Speaker, panelist and presenter materials and biographies due.

### **2 weeks before event**

- Final e-blast.
- All final arrangements for a/v and food & beverage orders due to hotel.
- Materials due.

### **1 week before event**

- PowerPoints due. Flash drives loaded and name badges printed.

## **Retreat Planning Deadlines**

### **6-12 months before event**

- Decide where to go. We will bid up to 3 locations and 3 dates
- Send out request for proposals and negotiate your contract.
- Book your event.

### **6 months before event**

- Notify council members, officers and board advisors of meeting date and location along with general itinerary, information to book guest room and the cutoff date for the discounted guest room rate.
- Remind all above to book flights at this time for the best rates, especially if out of state.

### **3-4 months before event**

- Remind council members, officers and board advisors of meeting date and location and that the cutoff date is approaching to book guest rooms at the discounted rate.
- Check rooming list from hotel.
- Book dinners.

### **2 months before event**

- Request relevant meeting materials: meeting agenda, past meeting minutes, treasurer and membership information; etc.
- Check rooming list from hotel.
- Provide room set-up, a/v and initial food & beverage orders to hotel.

### **1 month before event**

- Final reminder to council members, officers and board advisors of meeting date and location and that the cutoff date is approaching to book guest rooms.

### **2 weeks before event**

- All final arrangements for a/v and food & beverage orders due to hotel.
- Reminder for relevant meeting materials: meeting agenda, past meeting minutes, treasurer and membership information; etc.

### **1 week before event**

- All meeting materials due for website upload for paperless circulation to all.
- Circulate teleconference number for those who will participate by phone if conference phone will be available.
- Provide final agenda and itinerary to council.

## **Small Council Meeting Planning Deadlines**

### **5-6 months before event**

- Book your event.

### **3 months before event**

- Notify council members, officers and board advisors of meeting date and location along with general itinerary.
- Remind all above to book flights at this time for the best rates, especially if out of state.

### **2 months before event**

- Remind council members, officers and board advisors of meeting date and location.
- Request relevant meeting materials: meeting agenda, past meeting minutes, treasurer and membership information; etc.
- Provide room set-up, a/v and initial food & beverage orders and or catering options.

### **2 weeks before event**

- All final arrangements for a/v and food & beverage orders and or catering due.
- Reminder for relevant meeting materials: meeting agenda, past meeting minutes, treasurer and membership information; etc.

### **1 week before event**

- All meeting materials due for website upload for paperless circulation to all.
- Circulate teleconference number for those who will participate by phone if conference phone will be available.