

GUIDEBOOK FOR PLANNING AND DELIVERING CONTINUING PROFESSIONAL DEVELOPMENT PROGRAMS AND EVENTS



McMaster University
Faculty of Health Sciences
Continuing Health Sciences Education Program



www.fhs.mcmaster.ca/conted

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GENERAL PRINCIPLES

McMaster University Continuing Health Sciences Education (CHSE) Program conducts continuing professional development (CPD) events and activities in accordance with policies and guidelines from the Canadian Medical Association (CMA), the College of Family Physicians of Canada (CFPC), the Royal College of Physicians and Surgeons of Canada (RCPSC), the Association of the Faculties of Medicine of Canada (AFMC), the Committee on Accreditation of Continuing Medical Education (CACME), the Accreditation Council of Continuing Medical Education (ACCME) and the McMaster University Faculty of Health Sciences policies and procedures. Reference documentation also includes the Principles and Integrity Code of Conduct document produced by Canada's research-based pharmaceutical companies otherwise known as the Rx&D guidelines.

Fundamental principles include the:

- provision of high quality evidence-based and best practice content
- promotion of interdisciplinary and inter-professional education
- maintenance of appropriate standards regarding industry support

The CHSE Program endeavours to provide support to all health care disciplines and programs within the Faculty of Health Sciences and this guidebook is intended to provide information regarding the development, organization and delivery of sound and valuable continuing professional development events and activities for all health care professionals.

For the purpose of this guidebook the term Continuing Professional Development (CPD) will be considered synonymous with continuing education (CE), continuing medical education (CME), continuing health sciences education (CHSE), faculty development (FD) and inter-professional education (IPE). It is recognized that CPD may take many forms that assist health care professionals in more effectively providing services by increasing knowledge, skills or professional performance.

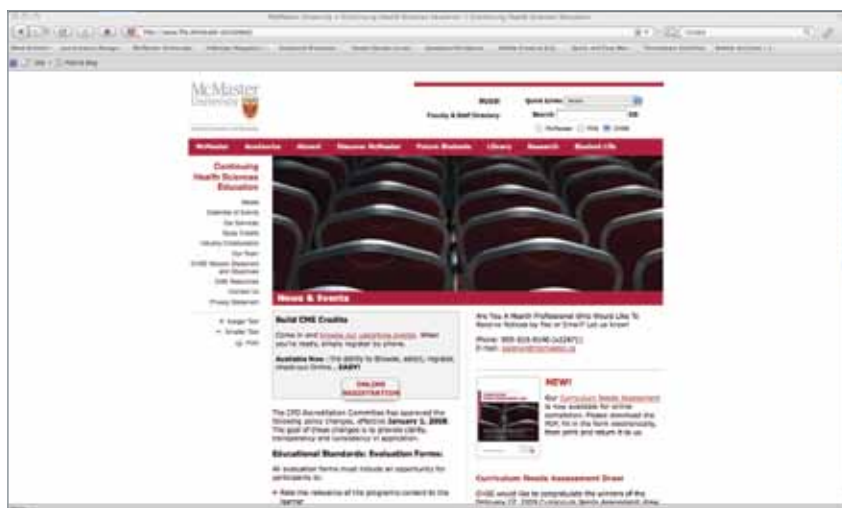
The content, forms and documents in this guidebook are the property of McMaster University Continuing Health Sciences Education Program and may not be used in whole or in part or in a modified format without permission from the CHSE Program.

CHSE WEB SITE

The CHSE website can be located at:

www.fhs.mcmaster.ca/conted

The site offers information regarding the calendar of events and services available through the CHSE Program. These include accreditation and administrative services for planning, development and logistical support of CPD activities conducted throughout the Faculty of Health Sciences (Appendix 1). The site also includes a number of important links to organizations and partners in continuing professional development as well as information links to standards for CPD activities (Appendix 2).



CREDIT APPLICATION PROCESS

Accreditation of CPD events is generally associated with the specific continuing education requirements of the regulatory bodies of the physician groups (CFPC, RCPSC, AMA) that have well defined continuing education programs and processes. While other health care professional groups do not have such formalized credit programs, the philosophy of the CHSE Program is to promote professional development for all groups within the Faculty of Health Sciences including Nursing, Midwifery, Occupational Therapy, Physiotherapy and other health professional groups. Continuing professional development events and activities for all faculty within the McMaster University FHS should meet the same criteria for high quality and best practice content in order to meet the educational needs of all health care providers. Both physician and non-physician faculty are encouraged to pursue individualized CPD programs and maintain a personal portfolio of educational activities to demonstrate their commitment to lifelong learning. All groups should consider the potential for joint educational opportunities.

A guide to completing the study credit application can be found under “Study Credit Guide” and the application for program review and study credits can be found under the heading “Study Credits” at:

www.fhs.mcmaster.ca/conted/study_credit_forms.html

Application for accreditation are reviewed for credits under the following categories:

- The College of Family Physicians of Canada MainPro M1
- The Royal College of Physicians and Surgeons of Canada MainCert Program Section 1 and 3
- The Physician’s Recognition Award Category One of the American Medical Association.

Only accredited university continuing medical education programs such as the CHSE Program at McMaster University have the authority to accredit within all three categories. Accreditation will be applied to all categories appropriate to the target audience.

Application for accreditation of a CPD activity can also be made to the individual professional colleges for accreditation for their respective categories. Applications for MainPro credits can be made to the National Committee or Provincial Chapters of the CFPC. Application for MainCert credits can be made to the appropriate National Specialty Committees of the RCPSC.

In order for an event to be eligible for **MainPro M1 credits**, the College of Family Physicians of Canada requires that at least one member of the event planning committee representing the target audience is a member of the CFPC. Regional representation is required for accreditation of CPD activities intended for a national audience.

In order for an event to be eligible for **MainCert credits**, the Royal College of Physicians and Surgeons of Canada requires at least one member of the event planning committee representing the target audience is a member of the RCPSC.

Membership on the event planning committee should also include representation from non-physician segments of the defined target audience. While other non-physician health care professional groups may not have continuing education requirements as formalized as the physician colleges, there should be opportunity for input in the program development and design to ensure educational needs are considered. Representatives from industry or commercial sponsors should not be members of the event planning committee.

All members of the event planning committee representing the various segments of the target audience should have substantial input into the program development including content, speaker selection and format.

The completed application must be submitted to the CHSE office at least one month prior to the planned date of the program to allow adequate time for review and dialogue with the event planning committee chair and members. The processing and approval of applications received less than 4 weeks before the scheduled event date cannot be guaranteed.

The complete application includes the following documents:

1. Educational needs assessment information
2. Learning objectives pertinent to the target audience
3. A program outline identifying speakers and presentation topics or titles
4. A program schedule that identifies opportunities for participant interaction
5. A program schedule that identifies periods for breaks
6. A budget indicating anticipated revenues from all sources and expenses
7. Samples of marketing materials in draft form

Applications should be submitted in a timely fashion to allow the review of draft promotional material before final printing and distribution to prevent errors or omissions.

Marketing and promotional material should not contain any comments regarding the accreditation status of a program prior to the program being reviewed and officially accredited by an authorized accrediting body (Refer to section Marketing, Brochure Development Advertising and Promotion).

Specific details or additional material for an event may be requested for audit and review purposes to examine content, format and presentation balance. This may include Power Point presentations, handouts, publications and other forms of enduring materials provided as elements of the CPD event.

The CHSE Program, the chair and the members of the event planning committee and individuals engaged in the planning, development and delivery of CPD activities share joint responsibility for the academic integrity of CPD events that are represented as an activity of or in association with the McMaster University Faculty of Health Science.

Individuals engaged as event faculty including speakers, presenters, moderators and facilitators for CPD activities in association with McMaster University Faculty of Health Science are expected to participate in a manner which promotes and maintains the McMaster University standards of academic integrity.

The CHSE fee for accrediting events includes a non-refundable fee for administrative review as well as a per capita fee based on the full numbers of attendees and registrants for the event.

The current fees for accreditation application processing can be viewed at the CHSE Program web site www.fhs.mcmaster.ca/conted/ under "Our Services."



RESPONSIBILITIES OF THE CHAIR OF THE EVENT PLANNING COMMITTEE

The Chair of the Event Planning Committee:

1. Must hold an active appointment in the Faculty of Health Sciences McMaster University.
2. Will ensure the composition of the event planning committee represents appropriate segments of the target audience.
3. Will assume the responsibility for the accuracy of the information in the application.
4. Will be accountable for the organization, conduct and integrity of the CPD event or activity.
5. Will be responsible for the overall content, accuracy of information, sponsor relationships and disclosures.
6. Will be familiar and compliant with the appropriate guidelines from the CMA, professional organizations and the McMaster University FHS regarding the conduct of CPD activities.
7. Will be responsible for providing registrant and attendance information as required by the CHSE Program for accreditation and audit purposes.
8. Will ensure that registrant and personal information is managed according to Freedom of Information and Protection of Privacy Act (FIPPA) as adopted by McMaster University (Appendix 3).
9. Will provide the CHSE Program with appropriate financial details for revenues and expenditures relating to the educational event for audit purposes.
10. Will provide personal disclosure and conflict of interest (COI) statements material to the development, organization, delivery or conduct of a CPD event (Appendix 4).
11. Will provide disclosure and COI statements from the members of the event planning committee material to the development, organization, conduct or delivery of a CPD event (Appendix 4).
12. Will provide disclosure and COI statements from speakers, presenters and moderators material to the development, organization, conduct or delivery of a CPD event (Appendix 5 Speaker Information Form).

Should accreditation be provided for a McMaster University Faculty of Health Sciences continuing education event by an authorized accredited provider other than McMaster University CHSE Program, the chair of the event planning committee will be responsible for ensuring that the appropriate application process has been followed and will provide a copy of the written documentation from the accrediting organization to the CHSE Program to verify accreditation status if requested.

The chair of the event planning committee will be responsible for ensuring that the marketing and promotional material for the CPD event identifies the accredited organization provider that has reviewed and accredited the event (CFPC chapter, RCPSC Specialty Committee, University CPD office) and that the appropriate authorized statements of accreditation status are used. Accreditation statements should not be included in promotional material prior to receiving confirmation of the official accreditation status from an authorized accrediting authority.

The chair of the event planning committee will ensure that the registrant and participant information for CPD events not accredited through the McMaster University CHSE Program will be maintained and accessible for review according to McMaster University policies.



EVENT PLANNING COMMITTEE MEMBERSHIP AND DUTIES

The event planning committee membership should reflect appropriate representation for the intended target audience. This is to ensure that the educational needs of all segments of the target audience are identified recognized and addressed. Where possible, membership on event planning committees should reflect the principles of inter-disciplinary and inter-professional education.

Where application will be made for official accreditation, the membership of the event planning committee must include individuals with appropriate standing in the CFPC and/or the RCPSC.

Event planning committee members are encouraged to consider the opportunities to promote inter-professional education using a variety of learning methods that best meet the needs of adult learners.

Members of the event planning committee will advise the chair with regard to the development of the program including learning methods, venue, topic and speaker selection and issues of fiscal responsibility.

Members of the event planning committee are responsible for providing personal information regarding potential conflict of interest and disclosure statements for relationships and affiliations with industry (Appendix 4).

Industry or sponsor representatives should not be members of the event planning committee nor should they attend meetings of the event planning committee.

FUNDING OF CPD EVENTS

Financial support for the development, organization or conduct of a continuing professional development event may be received from industry or commercial sources, government agencies or professional associations including not-for-profit organizations.

Financial support from these sources must be provided to the event planning committee in the form of an **unrestricted educational grant** or an **unrestricted educational donation** where funding has been provided without stipulations linked to content or delivery. The expenditure of funds to organize and deliver the educational event is determined by members of event planning committee. Policies and practices for the acceptance, application and use of industry or commercial funding must adhere to the CMA Guidelines for Physicians Interactions with Industry Physicians and the Pharmaceutical Industry (Update 2007) (Appendix 6) and the Rx&D Guidelines 2009. (Appendix 7).

Financial support provided to an event planning committee for the provision of a specified continuing professional development event must be designated to that event to cover reasonable expenses necessary for the conduct of the event.

Residual or surplus funds generated from an event will be retained by the CHSE Program on behalf of the planning committee to be used for development, planning or conduct of subsequent events of a recurring nature or theme.

Residual or surplus funds from a single, non-recurring event will be retained by the CHSE Program for the University Faculty of Health Sciences and in consultation with the discipline/academic program may be used to support the development and provision of other education programs of a similar nature.

Neither the chair or members of the event planning committee are authorized to redirect funds that have been obtained for a specific educational event to another unrelated CPD activity or program without authorization of the sponsor(s). The documentation of financial activities relating to revenues and expenditures for CPD activities must adhere to the accounting principles and policies of the McMaster University FHS.

Funds from commercial sources can be used to pay travel, lodging, registration fees and personal expenses for members of the event planning committee, event faculty and /or speakers and individuals directly involved with the administration and conduct of the event. Honoraria and payment of out-of-pocket expenses for event faculty or speakers will be reasonable (Appendix 8).

The McMaster University travel policy and procedures document can be used as a guide for report of travel expenses. www.mcmaster.ca/bms/policy/accounts_payable/ap010.html

Funds from commercial sources may not be used to pay travel or lodging expenses, registration fees or personal expenses for any registrants who is not involved in the planning committee including non-faculty attendees or family members.

Other sources of funding for CPD events may include support from university programs or disciplines and income from registration or attendance fees.

FINANCIAL RECORDS

Financial statements for budgeted and actual revenues from all sources and expenditures for all activities for the conduct of CPD activities should be prepared by the event planning committee. The financial, accounting and reporting processes must comply with McMaster University FHS policies. Financial statements pertaining to CPD activities will be available to the CHSE Program for review and audit purposes as requested. A sample format for budgeting is provided in Appendix 9.

NEEDS ASSESSMENT PROCESS

The needs assessment should be conducted to identify perceived and unperceived educational needs of the target audience (Appendix 10). The needs assessment is intended to identify an absence or lack of necessary knowledge or skill that creates a variance between current practice and best practice activities. The needs assessment process may take a number of forms such as surveys of the target audience, evaluations from prior conferences, consensus of expert opinion, faculty perceptions, patient care audits, quality assurance and self-assessment tools. The needs assessment process should be used to identify appropriate learning objectives and ultimately the content and format of the educational event. The needs assessment process should not be driven or conducted by industry or commercial sponsors. The chair of the event planning committee may be required to provide specific details of the needs assessment conducted to the CHSE Program for audit purposes.

The needs assessment process forms the basis of the learning objectives, the program design and content.

LEARNING OBJECTIVES

The development of learning objectives may be the most difficult and most important part of developing a program but it is essential to ensure that the educational needs are clearly defined and appropriately met (Appendix 11). Learning objectives should be a description of the knowledge, skills, behavior, attitude or learning outcome the participants will gain by attending the CPD event. Learning objectives should be written from the perspective of the learner, describe what the participants will be able to do following the educational event and should permit evaluation to determine if objectives are met. A statement of the learning objectives should be included in the promotional material.

CREDIT PROGRAMS AND PROFESSIONAL PORTFOLIOS

A database is maintained by the CHSE Program to identify Health Sciences faculty involved in the planning, development and provision of CPD events or activities organized and managed through the CHSE Program as members of event planning committees or as faculty/speakers/presenters/moderators/facilitators. This information is reported to the Program for Educational Research and Development (PERD) and linked to the University Staff Activity Reporter (STAR) system to record academic contributions by faculty.

Reporting of faculty contributions for involvement in CPD activities not organized or managed through the CHSE Program is the responsibility of the chair of the event planning committee and should be reported to PERD for inclusion in the STAR database.

EVALUATIONS

A formal evaluation process of the educational event will be conducted with input from all the participants. The evaluation process should encourage participants to reflect on the educational activity and the relevance for their own individual learning needs. Evaluations should determine if the learning objectives were met, the appropriateness of the learning methods, the value and balance of the information according to best practice principles. Evaluations should specifically identify the perception of industry influence or bias within the educational materials (Appendix 12).

Evaluations should be reviewed by the chair and members of the event planning committee with appropriate feedback given to the event faculty. Evaluations should also be used as an element of the needs assessment process to develop future educational events.

FHS CPD EVENTS OFFERED INDEPENDENT OF THE CHSE PROGRAM

There is no requirement that programs or disciplines run CPD events through the Continuing Health Science Education Program. However, programs or disciplines that offer CPD events under the auspices of McMaster University Faculty of Health Sciences must adhere to the same guidelines, principles and policies of McMaster University, the Faculty of Health Sciences and the Continuing Health Sciences Education Program.

Some types of CPD activities qualify as self accredited activities of the RCPSC (Appendix 13). These include activities of a recurring nature such as hospital-based rounds. The RCPSC has established criteria for the conduct of self accredited events. For information regarding the criteria, process and fees for any of the categories refer to the accreditation guidelines of the respective professional colleges.

Discipline chairs, program administrators and McMaster University faculty who organize and conduct FHS CPD programs independent of CHSE will be responsible for the following:

1. Accreditation application to appropriate professional colleges.
2. Registration processes and management of personal information in compliance with Freedom of Information and Protection of Privacy Act (FIPPA) and the standards of the FHS (Appendix 3).
3. Appropriate disclosure and conflict of interest statements of the event planning committee members, faculty and event speakers/presenters.
4. Maintenance of attendee/registrant database information for auditing of accredited events.
5. Maintenance of appropriate financial records in accordance with McMaster University FHS policies.
6. Maintenance of event documentation in a secure and retrievable format.
7. Reporting of participant/registrant information to the CHSE Program as required for audit purposes.
8. Reporting of budget and financial statements to the CHSE Program as required for audit purposes.
9. Reporting of conflict of interest and disclosure statements of event planning committee members and program faculty to the CHSE Program as required for audit purposes.

USE OF THE MCMASTER UNIVERSITY IMPRIMATUR (LOGO)

The McMaster University imprimatur may be used in association with continuing professional development events and marketing activities of the events with the approval of the discipline chair, the discipline continuing education committee, FHS program directors or on the authority of the CHSE Program. Individual faculty members are not permitted to use the McMaster University Faculty of Health Science imprimatur without authorization.



CERTIFICATES OF ATTENDANCE STUDY CREDIT LETTERS

Certificates of attendance and/or study credit letters are to be issued only by duly authorized accrediting agencies. These include the CFPC, Specialty Societies of the RCPSC, the AMA and university departments of continuing education or continuing professional development.

Certificates of attendance at McMaster University FHS CPD events for non-physician registrants should only be provided for the events that are registered with the CHSE Program.

MARKETING, BROCHURE DEVELOPMENT, ADVERTISING AND PROMOTION

Materials for the marketing and promotion of CPD events should contain the following information:

- Title of event
- Venue, location, date and time
- Learning objectives
- Target audience
- Registration fees
- Cancellation and refund policies
- Accreditation status if approved
- Identification of accredited provider organization
- Approved accreditation statement with assigned credit value

Statements of accreditation status included in marketing material should identify the accrediting body. The CHSE Program provides specific accreditation statements for all three accreditation categories (Appendix 12).

Advertising and promotional materials for events accredited by an authorized accredited provider other than McMaster University CHSE Program must identify the accrediting organization and include the authorized statement of accreditation obtained from the accredited provider (Appendix 14).

Materials for the marketing promotion of CPD events should emphasize the educational nature of the event. Aspects of the venue or social activities linked to the program should be secondary to the educational content.

REGISTRATION FEES/DIFFERENTIAL RATES/REGISTRATION NUMBERS

Event planning committees are encouraged to establish registration fees for all educational events. The use of registration fees is encouraged to offset some or all of the costs associated with conducting the educational activity. The use of differential registration fees for physicians, nurses, other health professionals, residents and students categories is encouraged. At a minimum, registration fees should offset the costs of social activities, meals and refreshment expenses.

Event planning committees are encouraged to consider differential registration fees for early bird registration to promote attendance. Consideration should also be given to a differential fee for late or on

site registrations since these are associated with increased administrative costs.

Setting limits to the maximum number of registrants should be considered based on the format, venue and facility capacity for the planned event. When planned events have a limited capacity, the limits should be noted in the promotional material.

REGISTRATION POLICIES/PRACTICES

Registration information for all CPD events should be processed by university staff and should be managed according to the University policies for confidentiality and privacy protection. Responsibility for registration and the collection of information pertaining to registrants should not be delegated to an external agency including an industry sponsor or an identified communications company or consultant group. Personal information from registration should not be relayed or provided to sponsors, industry representatives or external communication companies.

The CHSE Program registration processing fee applies to all health care professionals registered in CHSE Program events. The fee covers a spectrum of associated registration services. The accreditation application processing fee, the CHSE Program administration fees and range of conferencing services can be found in Appendix 15.

REFUND AND CANCELLATION POLICIES

It is recommended that event planning committees establish policies with regard to registration cancellation and refunds. The policy should indicate the amount of the refund and the timelines refunds will be honoured and processed. It is suggested that a specified amount as a percentage of the registration fee be identified as non-refundable and retained for administrative and processing purposes.



SPONSOR RECOGNITION

Sponsors may be acknowledged at the beginning and the ending of a slide presentation. Separate and distinct from the body of educational content. Sponsor logos or branding should not be embedded throughout the presentation.

Sponsor logos on advertising and promotional material should be appropriately sized and positioned relative to the McMaster University imprimatur. Sponsor recognition should be separate and distinct from the McMaster University FHS imprimatur and should be separate and distinct from presentation content.

It is appropriate for event planning committees to establish graded sponsorship recognition (Bronze, Silver, Gold etc) based on support provided. Categories will be determined by the event planning committee and should be consistent with sponsor privileges as determined by the event planning committee.

The event planning committee should consider the following:

- Recognition of sponsors at the beginning and end of a session/program
- Allocation and location of floor space in designated sponsor areas
- Tagging sponsorship to non-accredited elements of the program

Tagging sponsorship to specific elements of the educational program is not recommended and should be discouraged.

Sponsors should be provided with appropriate locations for registrant interaction separate from the location of the educational program.

Sponsors should not be permitted to provide product materials or promotional give-a-ways in the sponsor display areas or the educational areas. Materials suitable for distribution to delegates and participants in the designated sponsor area should be limited to educational materials and should not include products or product samples.

Where possible multiple sponsors should be acquired to support educational events. Single sponsor educational activities are discouraged to reduce the potential for bias or undue influence on the educational content.



APPENDIX 1 SERVICES OFFERED BY CHSE

The CHSE Program provides services to McMaster University faculty and staff on a cost recovery financial model. Administrative and logistical services offered by the CHSE Program can be found under “Our Services” at:

www.fhs.mcmaster.ca/conted

The CHSE Program provides consultation in all aspects of program planning and delivery to ensure compliance with guidelines and standards for the accreditation of CPD activities and McMaster University FHS policies.

Accreditation Services

- Application review and processing
- Needs assessment review
- Review of learning objectives for target audience
- Review of program outline and schedule
- Review of program evaluation component
- Review of promotion and marketing material
- Maintenance of faculty participation records
- Maintenance of registrant attendance records and database
- Provision of certificates of attendance and credit letters

Administrative and Logistical Services

Administration

- Development of planning time line and responsibilities
- Participation in event planning committee meetings

Financial Management Services

- Budget development
- Accounting services
- Revenue and expense management
- Preparation of financial statements and reports
- Preparation of receipts and taxation forms

Conference Planning

- Venue selection and bookings
- Hotel accommodation bookings
- Site preparation for registration and display areas
- Site preparation for educational sessions
- Site preparation for sponsor and industry exhibit area
- Arrangements for catering and food services
- Negotiations for custom services or discounts
- Organization of special events and companion programs
- Organization of social activities

Registration Services

- Faculty and participant registration services
- Credit card payment processing
- On-line registration processes
- Preparation of registrant lists
- Production of faculty, delegate and sponsor name tags
- Development and preparation of delegate materials
- Customized delegate workshop registration and timetables
- On-site staffing for registration desk
- On-site registration services

Commercial Support Management

- Liaison with sponsoring agencies
- Compile exhibitor/grantor request packages
- Manage and assign display and exhibitor space
- Monitor sponsor recognition

Guest and Local Faculty Arrangements

- Liaison with faculty and speakers
- Preparation of disclosure and conflict of interest statements
- Arrangement of speaker travel and accommodation needs
- Arrangement of audiovisual services
- Preparation of sponsor recognition materials
- Preparation of program reports and evaluation summary
- Arrangement of liability insurances
- Provision of on-site coordination services during the event

Promotion and Public Relations

- Design and development of program brochures
- Design and development of promotional material
- Design and development of on-site signage
- Distribution, mailing and advertising

Program Evaluation

- Design and develop evaluation forms
- Obtain and compile participant evaluation and feedback
- Prepare evaluation summary for planning committee

APPENDIX 2 LINKS TO PARTNER ORGANIZATIONS

- ACCME (Accreditation Council for Continuing Medical Education) www.accme.org
- AFMC (The Association of Faculties of Medicine of Canada) www.afmc.ca
- Alliance for Continuing Medical Education www.acme-assn.org
- American Medical Association www.ama-assn.org
- Association of Faculties of Medicine Canada www.afmc.ca
- CACME www.afmc.ca/education-cacme-e.php
- Canada's University eCME Provider www.mdcme.ca
- Canadian Association of Continuing Health Education www.cachecanada.org
- CHSE Program Home Page www.fhs.mcmaster.ca/conted
- CME Research and Development Database (University of Toronto) www.cme.utoronto.ca/RDRB
- The College of Family Physicians of Canada www.cfpc.ca
- College of Nurses of Ontario www.cno.org
- Dalhousie University (Halifax) www.cme.medicine.dal.ca
- Foundation for Medical Practice www.fmpe.org
- McMaster University Faculty of Health Sciences Schools and Programs
www.fhs.mcmaster.ca/main/schools_and_programs.html
- MD CME www.mdcme.ca/zerve.asp?id=6
- McGill University (Montreal) www.med.mcgill.ca/~cme
- Memorial University of Newfoundland (St. John's) www.med.mun.ca/pdcs
- National listing of CME providers and upcoming programs www.university-cme.ca/canada/index.php
- Northern Ontario School of Medicine www.normed.ca/education/chpe/default.aspx?id=1208
- Post Graduate Medical Education www.hs.mcmaster.ca/postgrad
- Program for Faculty Development www.fhs.mcmaster.ca/facdev
- Queen's University (Kingston) www.meds.queensu.ca/cpd
- Registered Nurses' Association of Ontario www.rnao.org



- Royal College of Physicians and Surgeons of Canada www.rcpsc.medical.org
- SACME (Society for Academic Continuing Medical Education) www.sacme.org
- School of Nursing www.fhs.mcmaster.ca/nursing
- School of Rehabilitation Sciences www.srs-mcmaster.ca
- Society for Academic Continuing Medical Education www.sacme.org
- University of Alberta (Edmonton) www.cpl.med.ualberta.ca
- University of British Columbia (Vancouver) www.cme.med.ubc.ca
- University of Calgary www.cme.ucalgary.ca
- Université Laval w3.fmed.ulaval.ca/fmc
- University of Manitoba (Winnipeg) University of Manitoba CME
www.umanitoba.ca/faculties/medicine/education/continuing_med_ed/>
- Université de Montréal www.fpcmed.umontreal.ca
- University of Ottawa www.med.uottawa.ca/cme
- University of Saskatchewan (Saskatoon) www.usask.ca/cme
- Université de Sherbrooke cfc.med.usherbrooke.ca
- University of Toronto www.cme.utoronto.ca
- University of Western Ontario (London) www.schulich.uwo.ca/education/cme
- Undergraduate Medical Education www.mcmaster.ca/student/undergrd.cfm



APPENDIX 3 FREEDOM OF INFORMATION AND PROTECTION OF PRIVACY ACT

Personal and financial information provided to the CHSE Program or other FHS programs, disciplines or event planning committees for the specific purpose of registration and/or payment for CPD events or activities conducted through the McMaster University FHS will be retained by authorized university personnel in compliance with section 42 of the Freedom of Information and Protection of Privacy Act of Ontario (RSO 1990).

This information will be for the exclusive use of McMaster University FHS and will not be released or shared in whole or part with industry or commercial sources.

A full description of the statute and most recent amendments can be viewed at:

www.accessandprivacy.gov.on.ca/english/act/index.html

APPENDIX 4

CONFLICT OF INTEREST STATEMENTS AND DISCLOSURES

Situations where an individual has a role in the planning or delivery of a CPD event in which there are competing interests / loyalties that impact on the educational content or message in a real or perceived manner must be declared by the individual in order to allow other planners, faculty or participants to make a judgment or evaluate potential bias of the material. The chair of the event planning committee, event planning committee members, speakers, presenters, facilitators and moderators must declare their affiliations, relationships and activities supported by commercial sources. These would include but are not limited to the following:

Commercial support through research activities

Commercial support for membership on industry advisory boards

Commercial support in the form of speaker's honoraria

Conflict of interest statements and disclosures should be provided in program materials and as a specific element of presentation material such as PowerPoint slide. Disclosure of conflict of interest must be made at the beginning of the presentation separate and distinct from content elements of the presentation.

Incidents of actual or perceived bias in a CPD event identified through the evaluation process or any other means will be referred to the chair and members of the event planning committee for review and comment. Feedback will be provided to the individual(s) involved and future activities will be reviewed and monitored for compliance. As appropriate, other authorities in the University may be notified in accordance with the University Integrity Policies.

APPENDIX 5 SPEAKER INFORMATION FORM

Continuing Health Sciences Education

Faculty of Health Sciences | Michael G. DeGroot Centre for Learning & Discovery
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www.fhs.mcmaster.ca/conted



Speaker Information Form

Updated June 2009

Name:	
Phone:	Cell:
Fax:	Home:
Assistant's Contact Information: (This information will NOT be released. It is strictly to be used for the planning of this event)	
Program:	
Topic:	
Location:	
Date:	
Time requested to present:	

Disclosure of Potential Conflicts of Interest

Planning Committee members and Speakers for all CHSE programs organized by Continuing Health Sciences Education & Conference Services, McMaster University of Hamilton, ON, are required to disclose any involvement with industry that might give a perception of bias.

The following is a list of requirements of the CHSE disclosure guidelines:

All faculty and planning committee members must provide a written description of their relationships with members of the pharmaceutical industry and other commercial industry over the previous **two years: not just those directly related to the topic of content being discussed at this conference.**

Disclosure must be provided to the participants either as part of the written conference material AND must be described in the second slide at the time of the presentation.

Planning Committee members and Speakers who have no involvement with industry should inform the audience that they have nothing to disclose i.e. can not identify any potential conflict of interest.

Continuing Health Sciences Education & Conference Services (CHSE) will not assume responsibility to disclose on behalf of planning committee members or speakers.

Please indicate whether or not you have any Potential Conflicts of Interest below:

NO I have no Potential Conflict of Interest for this program/presentation.
OR

YES I have a Potential Conflict of Interest for this program/presentation (please see below).

The questions below are based on the disclosure policy. **If you answer "YES" to any of these questions, we recommend that you declare your Potential Conflict of Interest at the BEGINNING of your presentation.**

Regarding a company or companies who have an interest in the content covered by this presentation:
Check if "yes" and provide the name of the Company or Companies after each question:

- Do you have any direct financial interest in any company whose interests are in the area(s) covered by the presentation material ("Company")?
- Do you hold investments in the Company?
- Are you a member of an Advisory Board or similar committee of the Company?
- Are you currently participating, or have you recently participated, in a clinical trial sponsored by the Company?
- Are you participating in clinical studies using products produced by the Company?
- Have you assisted in the design of clinical studies concerning the use of products manufactured by the Company?
- Has the Company sponsored any of your research in this area?
- Have you received payment or an honorarium from the Company for speaking?
- Do you hold a patent for a product referred to in the presentation or marketed by the Company?
- Do you have a financial affiliation with a company, which is not sponsoring this event but has competing products or services as the sponsor(s)?

In principle, the audience should be aware of any potential biases a teacher may have in the presentation of material. In many events, such as sponsored visiting lectureships or conferences underwritten by educational grants from industry, there is an explicit recognition of the nature of the sponsorship. Armed with this knowledge, an audience can properly evaluate the content of the presentations or teaching.

The following are examples of disclosure statements:

I, presenter, have no affiliations, sponsorships, honoraria, monetary support or conflict of interest from any commercial source.

or

Presenter perceives no conflict of interest with this presentation but presents companies that he/she has worked with or consulted for. List companies:

A/V Requirements

Please indicate what you would like available for your presentation:

- LCD & computer LCD only (will bring your own computer)
- Laser Pointer Flipchart Other, please specify: _____
- USB Key will be provided to the registrants. Please indicate that we have permission to upload your handout presentation as a non-modifiable PDF to the key. YES NO (include if appropriate)

***Please note that any special requests (including video clips) within your presentation must be clearly identified and provided in advance to ensure that we have the ability to facilitate.**

Biography

Short Biography (please email a one paragraph Biography that is required for introduction purposes)

EXAMPLE:

Dr. John Doe

John Doe graduated from Harvard University and came to Canada in 1980. He was an assistant professor at Dalhousie University. He is presently at McMaster University and is an Associate Professor, Department of Clinical Epidemiology and Biostatistics. Research interests include the population epidemiology of chronic renal insufficiency and the prevention of thrombotic and bleeding complications in chronic renal insufficiency and dialysis.

***Please forward all information to Sheilah Laffan (laffans@mcmaster.ca) by (_____ 3 weeks prior)**

Slide/Handout Presentation

Handout Slide Presentation (no more than 24 slides/preferably 6 per page)

Please forward to Sheilah Laffan (laffans@mcmaster.ca) by (_____ 3 weeks prior) to ensure that there is sufficient time to print the material. **Please DO NOT FAX your handout material, please forward either by email or mail.**

Slide Presentation (in **POWERPOINT** Format)

In addition, we would appreciate it if you could forward the final Power Point presentation to: Sheilah Laffan (laffans@mcmaster.ca) by (_____ 2 weeks prior) at the latest so that it can be loaded onto the presentation computer and checked. In addition, please bring a copy on a flash drive. **PLEASE NOTE THAT THE TALK WILL BE DELETED AFTER THE CME DAY AND NO COPIES WILL BE MADE OR DISTRIBUTED UNLESS EXPLICITLY AGREED TO BY YOU.**

Acceptance (circle agree or disagree and please sign)

I (Agree / Disagree) to present on the topic requested, and in the event that I am unable to do this, it is my responsibility to find a replacement unless an emergency warranted my absence.

If your material has not been received by the deadline requested above I understand that it is my responsibility to provide my own printed material on the day of the event.

Signature: _____

Date: _____

**PLEASE FORWARD YOUR COMPLETED FORM TO:
SHEILAH LAFFAN via FAX 905-572-7099 or EMAIL laffans@mcmaster.ca**

To email, fill out the form electronically, save the PDF to your computer and mail back as an attachment.

HONORARIA

Program Name:	Date:
Name:	
Home Address:	
City:	Province:
Postal Code:	Phone Number:
Email:	

Indicate your preference of payment (select one of the three options listed below):

Employee of McMaster University

Honoraria payments are processed through McMaster University payroll system. Deductions may be withheld from your payment. As per CRA regulations, a T4A will be issued to you. Honorarium payment will be deposited into employee's designated bank account.

McMaster University Employee Number:

Social Insurance Number:

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Not an Employee of McMaster University

Honoraria payments are processed through McMaster University payroll system. Personal income taxes may be withheld from your payment. As per CRA regulations, a T4A will be issued to you. Cheque will be mailed to address specified above.

Social Insurance Number:

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Non-Resident Tax Waiver Application

If you are a non-resident of Canada, the Canada Revenue Agency (CRA) requires you to complete a "Non-Resident Tax Waiver Application" in order that personal income taxes will not be withheld from your honorarium payment. McMaster has posted a copy of the CRA's waiver form on www.mcmaster.ca/bms/forms/nonretax.pdf. Please forward it to the CRA. The CRA will send the waiver authorization to you. You are then required to submit the waiver to our department for processing of payment. No deductions are withheld from your payment. As it can take the CRA up to 8 weeks to process the application and issue the waiver authorization, this form needs to be submitted to CRA by you well in advance of the program for which you are receiving honorarium payment.

If you are not granted a tax waiver by the CRA, or decide not to apply for a tax waiver, the appropriate tax treatment is applied by our Payroll Dept. A T4-NR slip will be issued to you. You will need to file an individual tax return in order to obtain a refund of the tax withheld. The CRA website for Non-Residents of Canada is www.cra-arc.gc.ca/tax/nonresidents/individuals/nonres-e.html#k.

Honoraria payment into Business Account

Honoraria payments to limited or incorporated companies, partnerships, associations and groups are paid through Accounts Payable on a cheque requisition. The cheque will be mailed to the address specified below. The following information is required to process the cheque:

Name of Business:
Business Address:
City, Province, Postal Code:
GST/Business Number:

Signature: _____ Date: _____

PLEASE FORWARD YOUR COMPLETED FORM TO:
Sheilah Laffan via FAX 905-572-7099 or EMAIL laffans@mcmaster.ca

Updated Sept 2009

APPENDIX 6 EXCERPTS FROM: CANADIAN MEDICAL ASSOCIATION CMA POLICY GUIDELINES FOR PHYSICIANS IN INTERACTIONS WITH INDUSTRY, UPDATE 2007

Web site links to the CMA Policies can be found at:

The CHSE Program home page www.fhs.mcmaster.ca/conted under the “Industry Collaboration” section

The CMA web site www.cma.ca

Continuing Medical Education / Continuing Professional Development (CME/CPD)

21. This section of the Guidelines is understood to address primarily medical education initiatives designed for practicing physicians. However, the same principles will also apply for educational events (such as noon-hour rounds and journal clubs) which are held as part of medical or residency training.

22. The primary purpose of CME/CPD activities is to address the educational needs of physicians and other health care providers in order to improve the health care of patients. Activities that are primarily promotional in nature, such as satellite symposia, should be identified as such to faculty and attendees and should not be considered as CME/CPD.

23. The ultimate decision on the organization, content and choice of CME/CPD activities for physicians shall be made by the physician organizers.

24. CME/CPD organizers and individual physician presenters are responsible for ensuring the scientific validity, objectivity and completeness of CME/CPD activities. Organizers and individual presenters must disclose to the participants at their CME/CPD events any financial affiliations with manufacturers of products mentioned at the event or with manufacturers of competing products. There should be a procedure available to manage conflicts once they are disclosed.

25. The ultimate decision on funding arrangements for CME/CPD activities is the responsibility of the physician-organizers. Although the CME/CPD publicity and written materials may acknowledge the financial or other aid received, they must not identify the products of the company(ies) that fund the activities.

26. All funds from a commercial source should be in the form of an unrestricted educational grant payable to the institution or organization sponsoring the CME/CPD activity.

27. Industry representatives should not be members of CME content planning committees. They may be involved in providing logistical support.

28. Generic names should be used in addition to trade names in the course of CME/CPD activities.

29. Physicians should not engage in peer selling. Peer selling occurs when a pharmaceutical or medical device manufacturer or service provider engages a physician to conduct a seminar or similar event that focuses on its own products and is designed to enhance the sale of those products. This also applies to third party contracting on behalf of industry. This form of participation would reasonably be seen as being in contravention of the CMA’s Code of Ethics, which prohibits endorsement of a specific product.

30. If specific products or services are mentioned, there should be a balanced presentation of the prevailing body of scientific information on the product or service and of reasonable, alternative treatment options. If unapproved uses of a product or service are discussed, presenters must inform the audience of this fact.
31. Negotiations for promotional displays at CME/CPD functions should not be influenced by industry sponsorship of the activity. Promotional displays should not be in the same room as the educational activity.
32. Travel and accommodation arrangements, social events and venues for industry sponsored CME/CPD activities should be in keeping with the arrangements that would normally be made without industry sponsorship. For example, the industry sponsor should not pay for travel or lodging costs or for other personal expenses of physicians attending a CME/CPD event. Subsidies for hospitality should not be accepted outside of modest meals or social events that are held as part of a conference or meeting. Hospitality and other arrangements should not be subsidized by sponsors for personal guests of attendees or faculty, including spouses or family members.
33. Faculty at CME/CPD events may accept reasonable honoraria and reimbursement for travel, lodging and meal expenses. All attendees at an event cannot be designated faculty. Faculty indicates a presenter who prepares and presents a substantive educational session in an area where they are a recognized expert or authority.

ELECTRONIC CONTINUING PROFESSIONAL DEVELOPMENT (ECPD)

34. The same general principles which apply to “live, in person” CPD events, as outlined above, also apply to eCPD (or any other written curriculum-based CPD) modules. The term “eCPD” generally refers to accredited on-line or internet-based CPD content or modules. However, the following principles can also apply to any type of written curriculum based CPD.
35. Authors of eCPD modules are ultimately responsible for ensuring the content and validity of these modules and should ensure that they are both designed and delivered at arms’- length of any industry sponsors.
36. Authors of eCPD modules should be physicians with a special expertise in the relevant clinical area and must declare any relationships with the sponsors of the module or any competing companies.
37. There should be no direct links to an industry or product website on any web page which contains eCPD material.
38. Information related to any activity carried out by the eCPD participant should only be collected, used, displayed or disseminated with the express informed consent of that participant.
39. The methodologies of studies cited in the eCPD module should be available to participants to allow them to evaluate the quality of the evidence discussed. Simply presenting abstracts that preclude the participant from evaluating the quality of evidence should be avoided. When the methods of cited studies are not available in the abstracts, they should be described in the body of the eCPD module.
40. If the content of eCPD modules is changed, re-accreditation is required.

ADVISORY/CONSULTATION BOARDS

41. Physicians may be approached by industry representatives and asked to become members of advisory or consultation boards, or to serve as individual advisors or consultants. Physicians should be mindful of the potential for this relationship to influence their clinical decision making. While there is a legitimate role for physicians to play in these capacities, the following principles should be observed:

- A. The exact deliverables of the arrangement should be clearly set out and put in writing in the form of a contractual agreement. The purpose of the arrangement should be exclusively for the physician to impart specialized medical knowledge that could not otherwise be acquired by the hiring company, and should not include any promotional or educational activities on the part of the company itself.
- B. Remuneration of the physician should be reasonable and take into account the extent and complexity of the physician's involvement.
- C. Whenever possible, meetings should be held in the geographic locale of the physician or as part of a meeting which he/she would normally attend. When these arrangements are not feasible, basic travel and accommodation expenses may be reimbursed to the physician advisor or consultant. Meetings should not be held outside of Canada, with the exception of international boards.

GIFTS

44. Practising physicians should not accept personal gifts of any significant monetary or other value from industry. Physicians should be aware that acceptance of gifts of any value has been shown to have the potential to influence clinical decision making.

OTHER CONSIDERATIONS

45. These guidelines apply to relationships between physicians and all commercial organizations, including but not limited to manufacturers of medical devices, nutritional products and health care products as well as service suppliers.

46. Physicians should not dispense pharmaceuticals or other products unless they can demonstrate that these cannot be provided by an appropriate other party, and then only on a cost-recovery basis.

47. Physicians should not invest in industries or related undertakings if this might inappropriately affect the manner of their practice or their prescribing behaviour.

48. Practising physicians affiliated with pharmaceutical companies should not allow their affiliation to influence their medical practice inappropriately.

49. Practising physicians should not accept a fee or equivalent consideration from pharmaceutical manufacturers or distributors in exchange for seeing them in a promotional or similar capacity.

50. Practising physicians may accept patient teaching aids appropriate to their area of practice provided these aids carry at most the logo of the donor company and do not refer to specific therapeutic agents, services or other products.



MEDICAL STUDENTS AND RESIDENTS

51. The principles in these guidelines apply to physicians-in training as well as to practising physicians.

52. Medical curricula should deal explicitly with the guidelines by including educational sessions on conflict of interest and physician-industry interactions

APPENDIX 7

EXCERPTS FROM: CANADA'S RESEARCH-BASED PHARMACEUTICAL COMPANIES Rx&D CODE OF ETHICAL PRACTICES JANUARY 2009

Web site links to the Rx&D Guidelines can be found at: the CHSE Homepage

www.fhs.mcmaster.ca/conted

under the "Industry Collaboration" section

Code of Ethical Practices



4. EDUCATION FOR HEALTH CARE PROFESSIONALS

4.1 Preceptorships

4.1.1 Definition

Health care professionals' preceptorships are educational programs that should facilitate learning and transfer of skills and knowledge from one health care professional to another. These programs allow a local health care professional to spend time with a qualified expert in the field, to gain a better understanding and insight into a therapeutic area or disease state.

4.1.2 General Principle

In order to facilitate the transfer of knowledge and skills among qualified health care professionals, Members may support a preceptorship program. Reimbursement for the expert's travel and accommodation if necessary, and honoraria are acceptable.

Participants in the program may not be reimbursed for any costs or provided honoraria. As an exception to the general principle, a maximum of five health care professionals, per calendar year, per brand, may participate in a preceptorship program in a recognized center of excellence. In this instance, travel and accommodation may be reimbursed.

4.2 Speaker Training - new products or indications

4.2.1 Rationale

As new products or new indications are approved by Health Canada, a need may arise to train a small number of key opinion leaders around this information. These health care professionals are an appropriate group of practitioner/prescribers to disseminate this information to their colleagues.

4.2.2 Definition

A small group of selected health care professionals trained on new products or new indications for the sole purpose of disseminating this information at subsequent events. These training meetings called “Speaker Training” are designed to train a very select group of key opinion leaders on new products or new indications that meet the requirements of Health Canada regulations.

4.2.3 General Principles

Speaker training meetings should involve the selected group of key opinion leaders in the related field to meet at an appropriate venue within Canada. Travel and related expenses including fair and reasonable honoraria may be reimbursed. Appropriate hospitality may be provided (Section 7B); however no other social events (Section 4A.3.4) should be conducted. These participants must have a contract with the member companies to participate in the meeting and deliver subsequent training to health care professionals.

4.2.4 Number of Participants/Speaker Training Sessions

The number of speaker training sessions must be limited. Members may only have a limited number of speaker training sessions consistent with the need to train this very select group of key opinion leaders. Speaker training sessions may not include more than 20 health care professionals per meeting.

4.2.5 Special Circumstances

Speaker Training by an International key opinion leader.

- Should the need arise for Canadian key opinion leaders to be trained by an International key opinion leader from a country where the new product or indication is available then Members have the following options:
- Invite the International key opinion leader to Canada to conduct the training; or
- Send a maximum of five Canadian key opinion leaders per new product or indication to a recognised centre of excellence to receive the training. In this instance travel and accommodation may be reimbursed.

4A. CONTINUING HEALTH EDUCATION (CHE)

This Section applies to all Members, who are also responsible for the activities of any third party which organizes Continuing Health Education (CHE)¹ events on their behalf.

4A.1 Mission Statement

4A.1.1 The purpose of CHE is to provide and promote high quality health education programs for health care professionals, in partnership with groups that provide accredited CHE programs, such as:

- University faculties of health sciences;
- Health care associations; and
- Other Canadian accrediting CHE bodies.

The partnerships should be based on shared health values and mutual respect. CHE programs serve to enhance knowledge and understanding of advances in health research, health sciences and clinical practice so that health care professionals can, in turn, provide superior health care to patients. The benefits of this impact all Canadians.

4A.1.2 When embarking on such partnerships, Members will:

- Support, where possible, the principles and practices of CHE programs established by professional bodies such as:
- The Royal College of Physicians and Surgeons;
- The College of Family Physicians of Canada;
- The Federation of General Practitioners of Québec (FMOQ);
- The Federation of Medical Specialists of Québec (FMSQ);
- The Québec Council on Continuing Medical Education (CEMCQ);
- The Canadian Council on Continuing Education in Pharmacy (CCCEP); and
- Other Canadian accrediting bodies.
- Provide a balanced program of current scientific, biomedical, or other relevant information that adds to knowledge and enhances best practices in the health care professions.
- Contribute organizational expertise and resources.

4A.2 Definition of Continuing Health Education

Members are committed to separating CHE from other types of activities. CHE programs must be accredited or they must meet the principles for CHE described in Section 4A.2.3. Only those programs that meet and follow these criteria are considered CHE events under this Code.

4A.2.1 CHE consists of those educational programs which serve to maintain, develop, or increase the knowledge, skills and competence which a health care professional uses to provide care to patients, or service to the professions.

4A.2.2 The content of CHE programs must reflect that body of knowledge and skills which is accepted by the professions as constituting the basic health sciences, clinical sciences and clinical practice of the professions.

4A.2.3 A CHE program must adhere to the following principles of adult learning:

- A learning needs assessment must be conducted;
- A member of the target audience must help design and develop the program;
- Clear learning objectives must be identified based on the needs assessment, and the objectives must be reflected in the program;
- The program must be interactive; and
- A final evaluation which outlines how the learning objectives were achieved, must be conducted.

If these five principles are not met, the program cannot be promoted or designated as “educational.”

4A.3 General Principle

Symposia, congresses and other CHE programs are vital ways for Members to dispense knowledge, and for health care professionals to share their experiences with each other. The main goal of such meetings must be the enhanced well-being of all Canadians, through better health care. For this reason, the educational program must be the main focus of, and reason for, sponsoring or participating in an event.

These requirements apply to all types of CHE programs, including events organized by the Member and events organized through a third party.

4A.3.1 The program’s scientific content (as described in Section 4A.2.2) must be developed by consensus among the Member(s) and their CHE partner(s).

4A.3.2 The kinds of resources needed to organize the program (i.e. financial, people, expertise, technology) must also be agreed upon by the Member(s) and their CHE partner(s). The partners shall adopt an “open book” style of accounting; each partner has the right to know the financial, personnel and technological resources spent on, or donated to, a CHE program.

4A.3.3 In order to avoid timing conflicts or duplication of programs, Members and/or the program partner should inform local scientific and/or professional bodies of the dates and times of a CHE program.

4A.3.4 Member companies should not be involved in the development of, or payment for social functions conducted in conjunction with any CHE event.

4A.3.5 Grants and honoraria may be provided to health care professionals who speak at or moderate CHE programs. Such grants and/or honoraria do not apply to other health care professionals attending the program.

4A.3.6 Representatives of Members who attend a CHE program must follow the standards and guidelines outlined in the following sections of this Code:

- Section 1 - General Principles;
- Section 3 - Clinical Evaluation Packages; and
- Section 8 - Representatives of Pharmaceutical Companies.

4A.3.7 For events that have not been accredited, or which do not meet the principles of adult learning described in Section

4A.2.3, but which involve the presenting of medical/scientific information, organizers must conform to the spirit of Section 4 and, in particular, must adhere to Sections 4A.3.4 and 4A.3.5.

4A.3.8 The CHE programs organized by Members or through a third party are designed for health care professionals and invitations are to be extended only to health care professionals. These programs must not be offered to the spouses/companions or family members of health care professionals unless they are invited health care professionals as well. It is recognized that health care professionals may wish to travel with their spouses/companions or family members. Should they choose to do so, the planning and costs of the travel, accommodation, and meals and beverages of the spouses/companions or family members are the responsibility of the health care professionals. Members must not in any way offer support or facilitate the travel and accommodation arrangements of spouses/companions or family members of health care professionals, or extend hospitality to them, unless they are invited health care professionals as well.

4B. SPONSORSHIP TO INTERNATIONAL CONTINUING HEALTH EDUCATION EVENTS, SCIENTIFIC SYMPOSIA, CONGRESSES

4B.1 Definition - International CHE events

International CHE Events are defined as events that have been approved, endorsed, or sponsored by learned societies, and professional associations or bodies.

International CHE Events must take place outside of Canada in order for this Section to apply; when held in Canada, Section 4A applies.

4B.2 General Principle

In addition to their commitment to provide and promote, high quality health education programs for health care professionals in Canada, Members have a role to play in ensuring that Canadian physicians are educated and kept informed on developments in health research, health sciences, and clinical practice at the international level. To that end, they may receive and consider requests from individual physicians, specialty societies, and/or academic institutions for financial assistance to participate in international CHE events. In addressing this situation, both the supporting Member and the recipient(s) of the financial support should proceed on the understanding that the ultimate objective in exposing Canadian health care professionals to international CHE events is to improve health care for Canadians.

4B.3 In considering such requests, Members must comply with the following requirements:

- The request must be received in writing, and must include all details of the program, as well as the specifics of the educational program(s) to be delivered by the participant(s) on their return to Canada.
- The Member providing the support must respond to the request in writing, outlining the conditions/requirements underpinning the financial support.
- The Member must require the individual to advise whether or not he/she has requested support from more than one Member company to attend the same event.
- The individual(s)/organization(s) requesting the support must be required to share with Canadians the benefit of knowledge gained through (a) the submission of a report or paper to the supporting company, and (b) through a written report to the specialty society/academic institution or (c) a verbal presentation to health care professionals. Such papers and/or presentations must include a statement by the author/presenter acknowledging that financial support to attend the international CHE event was received, and such acknowledgement must identify the company from which the support was received.
- Members may provide financial support for a maximum of ten (10) individuals to any one international CHE event. Notwithstanding the provisions in Section 7B.1.3, a member company may extend hospitality to all their duly sponsored health care professionals to international CHE event. For hospitality, please refer to sections 7B.1.4 and section 7B.1.5.

5. CONVENTION/CLINIC DISPLAYS

5.1 General Principle

Convention/Clinic displays allow for enhanced interaction between health care professionals and the pharmaceutical industry. The main purpose of such displays must be the presentation of accurate information about the product(s) on display.

5.1.1 At least one qualified representative of the Member must be on site at all times after the convention/clinic display is set up, and until it is dismantled.

5.1.2 Where no exhibit space is available, a Member may not make a contribution towards a convention display.

5.1.3 Promotional and educational material available at the display shall not present information or claims that differ in any way from the official product monograph(s).

5.1.4 Reprints of scientific and medical papers may be distributed at the display, provided they are reprinted verbatim, and are not presented in a manner which differs in any way from the official product monograph(s).

5.1.5 Giving out CEPs at convention/clinic displays is not permitted.

5.1.6 Member representatives who are looking after a display must abide by all standards of behaviour for pharmaceutical representatives, as set out in this Code.

5.1.7 The fee a Member pays for exhibit space must not include additional donations to the association holding the convention. Additional donations must be reported as such.

5.1.8 If a Member sponsors a public relations event associated with a convention, the cost of that event must not exceed the cost of a single exhibit.

5.1.9 Sponsorship of Member-specific social functions is not permitted.

5.1.10 Members must not pay for or make a donation to displays set up on an ongoing basis at clinics/hospitals.

6. DONATIONS OR FINANCIAL SUPPORT

6.1 General Principle

As a demonstration of good corporate citizenship, Members recognize their responsibility to support worthwhile activities both within and outside their communities. A rationale and clear objective consistent with the Guiding Principles of the Code of Conduct should accompany all requests for financial support. When accepting a request Members should clearly indicate in writing to the requesting party what the Member is supporting.

6.1.1 Donations, including donations in kind, may be provided to organizations involved in promoting artistic, charitable, cultural, community, educational, humanitarian, health, philanthropic, and sporting activities. Members must ensure that such support is not undertaken for product promotional reasons, and is not directed to product promotion purposes. Acknowledgement by the recipient organization of such support must be restricted to an appropriate statement of support, and the corporate name and logo of the donating Member.

6.1.2 Where Members provide financial support to a charity and/or non-profit organization through such avenues as the purchase of a table or tables at a dinner or other social event, or through the purchase of a foursome or foursomes at a golf tournament, or similar activity, individuals invited to sit at the corporate table(s), or to play golf as part of the foursomes, should not be health care professionals.

6.1.3 Members must never provide a donation, directly or indirectly, in order to have access to a health care professional.

6.2 Access Fees

Under no circumstances shall a Member company pay a "clinic room rental fee", "clean-up fee" or any other similar type "fee" that can reasonably be construed as a direct or indirect payment in order to gain access to a HCP.

7A. GIFTS

7A.1 General Principle

Members recognize their responsibility to ensure the appropriateness and professionalism of their interactions with health care professionals.

7A.1.2 Members must not offer to any health care professional, or to any member of a health care professional's clinical/administrative staff, any gift - in cash or in kind, or any promotional aid, prize, reward, or any other item which is intended for personal/family benefit, or pecuniary advantage.

7B. HOSPITALITY

7B.1 Definition

In order to facilitate greater interaction around our business, Members may provide modest meals/refreshments to health care professionals. The primary objective of the hospitality should be to create the appropriate venue and interaction. Hospitality should not be utilized as the primary access to meet with health care professionals, but as an opportunity to expand the business discussions.

Members are prohibited from reimbursing employees for activities such as but not limited to golf, hockey, theatre and the spa. Member employees should not partake in such activities with health care professionals outside of the limited exceptions as described in Section 6.1.1 or as part of congresses/symposia that are incidental to these events and which are not organized by Member companies.

7B.1.2 During interactions with health care professionals, Members may only provide refreshments/meals to participants that are modest in content and cost. In all instances, the provision of refreshments/meals must be clearly incidental. No other form of hospitality or entertainment is to be provided.

7B.1.3 A maximum of five (5) health care professionals is permitted, per interaction. Although there may be more than one Member representative in attendance, the number of health care professionals cannot be increased to result in larger groupings.

7B.1.4 Under no circumstances can refreshments/meals be extended to spouses/companions of health care professionals unless the spouse/companion is himself/ herself a health care professional.

7B.1.5 As the interpretation of modest can clearly vary across the country depending on city or province, the onus is on Members to ensure that the venue is not excessive and/or "five star". Acceptable examples would be a meal/refreshment at any of the national "mid-range" hotel chains (e.g., Marriott, Hyatt, Sheraton) or similar types of local venues.

7B.1.6 While hospitality in the form of modest refreshments/meals may be offered during interactions, providing tickets, vouchers, or defraying the costs of this or any other event is not permitted.

APPENDIX 8 SUGGESTED FEES, HONORARIA AND EXPENSES FOR EVENT FACULTY AND SPEAKERS

Honoraria, Payments to Committee Members and CPD Faculty Presenters.

Individuals involved in the planning, development and delivery of Continuing Professional Development Events under the auspices of the Faculty of Health Sciences should receive recognition for their contributions. The decision as to the nature of the recognition is that of the event planning committee. The CHSE Program will function in an advisory or consultative role to the event planning committee as required. Multiple factors may determine the nature of the recognition. These include but are not limited to the following:

- Time commitment in preparation of material
- Time commitment for the presentation of material
- The nature of faculty involvement in the following roles:
 - Chair or member of the planning committee
 - Moderator
 - Facilitator
 - Presenter
 - Content reviewer
- The nature of the educational event
 - Local, provincial, national, international
 - Plenary session, lecture, workshop, panel presentation
 - Single event vs. enduring material
- Compensation for lost work time or opportunity costs
- Professional expertise in subject matter

The participation of Faculty in CPD events may be an expected part of their University position for which they may already receive compensation or it may be additional activity.

Compensation may be made in the form of monetary support such as cash honoraria, recognition through University AFP programs or other suitable forms of recognition.

The event planning committee must consider budgetary constraints and should provide compensation at a level that is consistent with the industry standard for faculty involvement in continuing professional development events.

Faculty members are not obliged to accept financial honoraria. Honoraria can be declined but the University is unable to redirect the honoraria to another recipient, program, department etc. The individual must receive the honorarium and redirect the money personally.

Here a faculty member receives honoraria or compensation for their involvement in CPD activities in their capacity as a representative of the FHS, the receipt of the honoraria should be reported to the Clinical Chair, Discipline Head or academic position responsible for department/program activities. Faculty should not receive double payment for their involvement in CPD activities of the University.

(Approved – CHSE Advisory Committee October 26, 2009)

Payment to Committee Members

Committee Members should not be compensated for time if they are salaried and meetings are held during working hours and there is no loss of income. Out of pocket expenses such as parking can be reimbursed with the appropriate receipts.

Travel Honoraria

Travel expenses, accommodation and meal allowance should be paid as per the McMaster University Travel Policy and Procedures.

www.mcmaster.ca/bms/policy/accounts_payable/ap010.html

www.mcmaster.ca/bms/policy/accounts_payable/ap010.html#19

The CHSE Program is able to provide suggestions and guidance to event planning committees and faculty regarding the current industry standards for recognition and compensation for participation in continuing professional development activities. Please contact the CHSE Program Administrator for more information.

APPENDIX 9 SAMPLE BUDGET TEMPLATE

The following is a sample of line items that may be included in a budget proposal.

CME EVENT BUDGET SHEET		
Name of Event: _____		
Date of Event: _____		
	BUDGETED	ACTUAL
INCOME		
Registration Fees		
Registrants:		
# of registrants @ \$ _____	0.00	0.00
# of registrants @ \$ _____	0.00	0.00
# of registrants @ \$ _____	0.00	0.00
# of registrants @ \$ _____	0.00	0.00
# of exhibitors - No Fee	0.00	0.00
# of Planning Committee members - No Fee	0.00	0.00
Sub-Total	0.00	0.00
Unrestricted Educational Grants from Commercial Sources		
Company A	0.00	0.00
Company B	0.00	0.00
Company C	0.00	0.00
Sub-Total	0.00	0.00
Other Grants or Sources		
Name 1	0.00	0.00
Name 2	0.00	0.00
Name 3	0.00	0.00
Sub-Total	0.00	0.00
Exhibitor Fees		
Exhibitor 1 Name	0.00	0.00
Exhibitor 2 Name	0.00	0.00
Exhibitor 3 Name	0.00	0.00
Sub-Total	0.00	0.00
TOTAL INCOME		
	0.00	0.00
EXPENSES		
Instructional Expenses:		
AV/Equipment Rental & Support	0.00	0.00
Conference Site/Room Rental	0.00	0.00
Honoraria	0.00	0.00
Table Rental	0.00	0.00
Travel/Accommodation - Speakers	0.00	0.00
Enter Other Instructional Expense (Specify)	0.00	0.00
Enter Other Instructional Expense (Specify)	0.00	0.00
Sub-Total	0.00	0.00
Registrant Expenses:		
Lanyards	0.00	0.00
Catering	0.00	0.00
Credit Card Transaction Fee	0.00	0.00
Envelopes	0.00	0.00
Parking Passes, if applicable		
Postage	0.00	0.00
Enter Other Registrant Expense (Specify)		
Sub-Total	0.00	0.00
Administrative Expenses:		
Accreditation Fee	0.00	0.00
Advertising/Promotion - Brochure Development/Printing	0.00	0.00
Advertising/Promotion - Mark Your Calendar Notice Development/Printing	0.00	0.00
CME Administrative Fee	0.00	0.00
Mailing List Rental/Labels	0.00	0.00
Photocopying	0.00	0.00
Postage/Shipping	0.00	0.00
Printing - Evaluation Forms	0.00	0.00
Printing - Syllabus/Participant List	0.00	0.00
Registration Processing Fee (# of registrants @ \$25/registrant)	0.00	0.00
Staff - Overtime Hours	0.00	0.00
Staff - Travel/Accommodation	0.00	0.00
Table Rental	0.00	0.00
Telephone/Fax	0.00	0.00
Enter Other Administrative Expense (Specify)		
Sub-Total	0.00	0.00
TOTAL EXPENSES		
	0.00	0.00
BALANCE (INCOME LESS EXPENSES)		
	0.00	0.00

Date Budget Prepared/Updated: MM/DD/YY

APPENDIX 10 NEEDS ASSESSMENT GUIDE

Needs assessment is a term used to describe the process involved in gathering information on learning needs of the target audience. It is the systematic process of gathering information and using it to determine instructional solutions to close the gap between actual knowledge and optimal knowledge for a given application.

Perceived and unperceived needs: Learning needs are divided into different categories. Perceived needs are those of which the learner is aware: “I know I don’t know,...”. Unperceived needs are those of which the learner is unaware: “I don’t know what I don’t know”. Both sets of needs are important to identify for the purpose of program planning and require different methods of assessment. This section provides a list of possible strategies to define learning needs.

Perceived

- Planning committee members
- Surveys
- Questionnaires
- Focus groups
- Requests from the target audience

Unperceived

- Self-assessment tests
- Chart audits
- Chart stimulated recal interviews
- Direct observation of practice performance
- Quality assurance data from hospitals
- Standardized patients
- Provincial databases
- Incident reports
- Published literature (random controlled trials, cohort studies)

Identification and analysis of CPD needs provide the basis for developing educational objective that inform the planning and delivery of an educational event.

The planning committee should determine the following:

How prevalent is the need among the target audience?

How many different assessment sources indicated this need?

How significantly will the unfulfilled need or knowledge gap hinder health care delivery?

How directly is the need related to actual healthcare provider performance?

How likely is it that a CPD activity will improve behaviour?

How likely is it that a CPD activity will improve performance?

How likely is it that a CPD activity will improve healthcare outcome?

Are sufficient resources available to effectively address this topic?

How receptive will the target audience be to a session on this topic?

Types of needs assessments

Inferred needs may be derived from the following:

- New methods of diagnosis or treatment
- Availability of new medication(s) or indication(s)
- Development of new technology
- Input from experts regarding advances in medical knowledge
- Acquisition of new facilities or equipment
- Legislative, regulatory or organizational changes effecting patient care

Verbalized needs and interests may be derived from the following:

- Requests submitted on participants' activity evaluation forms
- Formal surveys of potential participants (mail and Internet-based)
- Informal comments
- Patient problem inventories compiled by potential participants
- Consensus of faculty members within a department or service area

Proven needs based on objective external data sources may be derived from the following:

- Epidemiological data
- Quality assurance/audit data
- Re-credential review
- Morbidity/Mortality
- Statistics Infection control data
- Surgical procedures statistics
- Professional society requirements
- Journal articles/literature citations
- News media

Describe target audience

Describe work environment or work activities

Identify topics of importance to the work done or activities performed

Identify preferred learning style

Identify current knowledge or skill level

Determine desired knowledge, skill or performance level

APPENDIX 11 DEVELOPING SMART LEARNING OBJECTIVES

The following guidelines are provided to assist in the development of appropriate learning objectives for a proposed educational experience.

Step 1. Describe the information, skills, behaviors, or perspectives participants in the session will acquire through attendance and participation.

Step 2. Clearly identify the outcomes or actions participants can expect to demonstrate as a result of the educational experiences. See the action words below.

Step 3. Write the learning objectives that relate to these outcomes and that reflect the content of the session. Objectives describe the behavior of the learner, and:

- are stated clearly
- define or describe an action
- are measurable, in terms of time, space, amount, and/or frequency.

Domain	Emphasis	Relevant Verbs
Cognitive	Knowledge	Recall, identify, recognize, acquire, distinguish, state, define, name, list, label, reproduce, order
Cognitive	Comprehension	Translate, extrapolate, convert, interpret, abstract, transform, select, indicate, illustrate, represent, formulate, explain, classify, comprehend
Cognitive	Application	Apply, sequence, carry out, solve, prepare, operate, generalize, plan, repair, explain, predict, demonstrate, instruct, compute, use, perform, implement, employ, solve
Cognitive	Analysis	Analyze, estimate, compare, observe, detect, classify, discover, discriminate, explore, distinguish, catalog, investigate, breakdown, order, determine, differentiate, dissect, contrast, examine, interpret
Cognitive	Synthesis	Write, plan, integrate, formulate, propose, specify, produce, organize, theorize, design, build, systematize, combine, summarize, restate, argue, discuss, derive, relate, generalize, conclude, produce
Cognitive	Evaluation	Evaluate, verify, assess, test, judge, rank, measure, appraise, select, check, judge, justify, evaluate, determine, support, defend, criticize, weigh, assess
Affective		Agree, avoid, support, participate, cooperate, praise, help, offer, join
Psychomotor		Adjust, repair, taste, bend, measure, perform, operate, use, move

Avoid using verbs that are difficult to measure objectively. The following verbs are difficult to assess, thus should be used with caution:

know	be aware
comprehend	become acquainted with
understand	gain knowledge of
appreciate	cover
familiarize	learn
study	realize

Review Checklist:

Does the learning objective stem from a course goal or objective?

Is the learning objective measurable?

Does the learning objective target one specific aspect of expected performance?

Is the learning objective student-centered?

Does the learning objective utilize an effective, action verb that targets the desired level of performance?

Do learning objectives measure a range of educational outcomes?

Does the learning objective match instructional activities and assessments?

Does the learning objective specify appropriate conditions for performance?

Is the learning objective written in terms of observable, behavioral outcomes?

Reference:

Mandernach, B. J. (2003). Writing Quality Learning Objectives. Retrieved 2008/10/03, from [Park University Faculty Development Quick Tips](#).

APPENDIX 12

PROGRAM EVALUATION TEMPLATE



McMaster University, Continuing Health Sciences Education
 Michael G. DeGroot Centre for Learning and Discovery, MDCL 3510
 1200 Main Street West, Hamilton, Ontario L8N 3Z5
 Tel. 905-525-9140 | Fax: 905-572-7099

EVALUATION FORM

TO HELP US ASSESS THIS COURSE AND PLAN FUTURE PROGRAMS, PLEASE TAKE A MOMENT TO COMPLETE THIS EVALUATION FORM.

Course Name: _____

Name: _____ Address: _____

City: _____ Province: _____ Postal Code: _____

Profession: MD: F.P. Specialist Resident RN RNA OT Pharmacist Other _____

Please rate each presentation listed below by stating your agreement / disagreement to the following statements.

	STRONGLY DISAGREE ①	DISAGREE ②	NEUTRAL ③	AGREE ④	STRONGLY AGREE ⑤
	① ② ③ ④ ⑤	① ② ③ ④ ⑤	① ② ③ ④ ⑤	① ② ③ ④ ⑤	① ② ③ ④ ⑤
	① ② ③ ④ ⑤	① ② ③ ④ ⑤	① ② ③ ④ ⑤	① ② ③ ④ ⑤	① ② ③ ④ ⑤
	① ② ③ ④ ⑤	① ② ③ ④ ⑤	① ② ③ ④ ⑤	① ② ③ ④ ⑤	① ② ③ ④ ⑤
	① ② ③ ④ ⑤	① ② ③ ④ ⑤	① ② ③ ④ ⑤	① ② ③ ④ ⑤	① ② ③ ④ ⑤
	① ② ③ ④ ⑤	① ② ③ ④ ⑤	① ② ③ ④ ⑤	① ② ③ ④ ⑤	① ② ③ ④ ⑤
	① ② ③ ④ ⑤	① ② ③ ④ ⑤	① ② ③ ④ ⑤	① ② ③ ④ ⑤	① ② ③ ④ ⑤
	① ② ③ ④ ⑤	① ② ③ ④ ⑤	① ② ③ ④ ⑤	① ② ③ ④ ⑤	① ② ③ ④ ⑤
	① ② ③ ④ ⑤	① ② ③ ④ ⑤	① ② ③ ④ ⑤	① ② ③ ④ ⑤	① ② ③ ④ ⑤
	① ② ③ ④ ⑤	① ② ③ ④ ⑤	① ② ③ ④ ⑤	① ② ③ ④ ⑤	① ② ③ ④ ⑤
	① ② ③ ④ ⑤	① ② ③ ④ ⑤	① ② ③ ④ ⑤	① ② ③ ④ ⑤	① ② ③ ④ ⑤
	① ② ③ ④ ⑤	① ② ③ ④ ⑤	① ② ③ ④ ⑤	① ② ③ ④ ⑤	① ② ③ ④ ⑤
	① ② ③ ④ ⑤	① ② ③ ④ ⑤	① ② ③ ④ ⑤	① ② ③ ④ ⑤	① ② ③ ④ ⑤
	① ② ③ ④ ⑤	① ② ③ ④ ⑤	① ② ③ ④ ⑤	① ② ③ ④ ⑤	① ② ③ ④ ⑤
	① ② ③ ④ ⑤	① ② ③ ④ ⑤	① ② ③ ④ ⑤	① ② ③ ④ ⑤	① ② ③ ④ ⑤
	① ② ③ ④ ⑤	① ② ③ ④ ⑤	① ② ③ ④ ⑤	① ② ③ ④ ⑤	① ② ③ ④ ⑤
	① ② ③ ④ ⑤	① ② ③ ④ ⑤	① ② ③ ④ ⑤	① ② ③ ④ ⑤	① ② ③ ④ ⑤
	① ② ③ ④ ⑤	① ② ③ ④ ⑤	① ② ③ ④ ⑤	① ② ③ ④ ⑤	① ② ③ ④ ⑤
	① ② ③ ④ ⑤	① ② ③ ④ ⑤	① ② ③ ④ ⑤	① ② ③ ④ ⑤	① ② ③ ④ ⑤
	① ② ③ ④ ⑤	① ② ③ ④ ⑤	① ② ③ ④ ⑤	① ② ③ ④ ⑤	① ② ③ ④ ⑤

1. How did you hear about the program?

- Brochure Advertisement in Journal Word of Mouth Posting in Hospital Other: _____

2. What motivated you to attend this program?

- Content information pertinent to work setting Recommended by colleague Word of Mouth Needed for professional certification
 Other: _____

3. My personal objectives for the conference were:?

- Not met at all Met only slightly Met moderately well Met very well

4. This program was free of commercial bias?

- Strongly Disagree Disagree Neutral Agree Strongly Agree

5. Could this program have been more effective? If so, in what way?

6. This course will cause me to make these changes in my practice:

1. _____
2. _____
3. _____

7. Please rate the following:

Poor Fair Good Excellent

- ① ② ③ ④ Brochure (i.e. appearance, sufficient information given), conference registration and check in
① ② ③ ④ Facility
① ② ③ ④ Handouts and Audio Visual
① ② ③ ④ Catering, breakfast, lunch, breaks

8. What topics would you like addressed at future programs?

9. Would you prefer a HALF DAY EVENT (Yes) or a FULL DAY EVENT (Yes)

10. Would you prefer to receive a:

- Syllabus CD USB

11. Future location to consider:

- McMaster Site Off Site, Suggestion: _____

12. General Comments?

CHSE PROGRAM MISSION STATEMENT:

The mission of the Continuing Health Sciences Education Program is to provide educational opportunities to health care professionals to assist them to engage in life long learning pertinent to their professional activities. The main objective of the program is the provision of high quality educational opportunities to our Health Sciences faculty, students and educators as well as other health care professionals locally, regionally, provincially, nationally and internationally. This objective supports the McMaster University and Faculty of Health Sciences commitment to training professionals in a wide range of health care disciplines. The role of the CHSE Program is to assist health care professionals in identifying their educational needs for lifelong learning and facilitating access to opportunities that will have a positive impact on improving knowledge and skills for the health professional through exposure to balanced, evidence-based information. This will be fostered in a Continuing Professional Development (CPD) environment that promotes the tenets of inter-professional cooperation, commitment to the public and communities we serve, accountability responsibility, integrity, respect and excellence.

Did we accomplish this today? Yes No

APPENDIX 13 ROYAL COLLEGE OF PHYSICIANS AND SURGEONS OF CANADA SELF APPROVAL

www.rcpsc.medical.org/opd/moc-accreditation/self-accreditation/what_e.php

Activities and events such as rounds, journal clubs and small-group learning sessions represent a key component of the MOC program.

Self-approval is a process through which physician leaders ensure their rounds and journal clubs meet the established Royal College standards allowing these activities to be included under Section 1 of the Framework of Educational (CPD) Options.

Self-approval allows providers to design and implement continuing professional development activities that are interactive and responsive to the learners' needs. As with accreditation, self-approval places the responsibility of adhering to the Royal College standards with the provider developing and delivering the activity.

Formal accreditation from the Royal College is not required. However, all self approved rounds, journal clubs and small group learning sessions must be registered with the Royal College's Office of Professional Affairs. Once registered, the educational sessions are automatically included within Section 1 of the MOC program. The Royal College is committed to assisting chairs or planning committees to ensure adherence to standards established for these events are met.

Events eligible for self-accreditation:

- Rounds,
- Journal clubs,
- Other regularly occurring continuing professional development events, and
- Small-Group Learning sessions

Self-approval does not apply to clinical conferences, workshops or seminars. These events must be reviewed and approved by an accredited provider.

Groups of physicians and allied professionals meeting outside the hospital environment can also self-approve their small group activities under Section 1 of the Framework of Educational (CPD) Options. These activities are recognized by the Royal College if those developing and organizing the activity adhere to the self-approval requirements specified in the MOC program.

APPENDIX 14 ACCREDITATION STATEMENTS

Non Credit

McMaster University, Continuing Health Sciences Education Program is accredited to sponsor continuing medical education and continuing professional development events by both the Committee on Accreditation of Continuing Medical Education and the Accreditation Council for Continuing Medical Education of the United States. This program has been reviewed and approved as meeting accreditation criteria for health care professionals.

MainCert Credits

McMaster University, Continuing Health Sciences Education Program is designated as an Accredited Provider by the Royal College of Physicians and Surgeons of Canada. This educational event is approved as an Accredited Group Learning Activity under Section I of the Framework of CPD options for the Maintenance of certification Program of the RCPSC for a maximum of ____ hours. Each physician should claim only those credits that he/she actually spent in the activity

MainPro-M1 Credits

As an accrediting organization of continuing medical education events, McMaster University, Continuing Health Science Education (CHSE) has approved this educational activity. McMaster University CHSE designates this educational program as meeting the accreditation criteria of the College of Family Physicians of Canada for up to ____ MAINPRO M-1 credits. Each physician should claim only those credits he/she actually spent in the activity.

American Medical Association PRA Category 1

McMaster University, Continuing Health Science Education Program is accredited to sponsor continuing medical education and continuing professional development events by both the Committee on Accreditation of Continuing Medical Education and the Accreditation Council for Continuing Medical Education of the United States. McMaster University CHSE designates this educational program for a maximum of ____ hours in Category 1 credit towards the AMA Physician Recognition Award.

Accreditation Statements for RCPSC CPD Activities

www.rcpsc.medical.org/opd/cpd/prog-guide_e.pdf

The following wording of the accreditation statement is approved by the RCPSC:

“This event is an Accredited Group Learning Activity (Section 1) as defined by the Maintenance of Certification program of The Royal College of Physicians and Surgeons of Canada, approved by [accredited provider’s name].”

(note: the accredited provider responsible for event review and approval of the event as meeting the CPD requirements of the RCPSC must be identified by name on the marketing materials and the certificate or credit letters)

Accredited Providers of CPD Activities for Specialists

www.rcpsc.medical.org/opd/moc-accreditation/providers/providers_e.php

Accredited providers include the National Specialty Societies and the University CME/CPD Offices.

APPENDIX 15 CHSE FEES



REGISTRATION PROCESSING FEE

Registration Processing Fee is \$25 per registrant, not limited to professional designation.

This fee covers expenses related to registration activities such as:

Entering each registrant's personal data; processing the registration applications including journal entry, credit card or cheque payments; issuing receipts for registration fees; generating all name tags with accompanying 'agenda at a glance' or personal workshop schedules based on registrant choice;

Providing master registration lists for on-site registration;

Ensuring room capacity is not exceeded and that each session has equal attendance should it run concurrently;

Preparing and providing Continuing Health Sciences Education study credit letters or certificates of attendance that are based on each registrant's professional designation. A hard copy is provided on site to all who have pre-registered.

A portion of this fee is also used to maintain the information database that is securely stored on a stand alone server for up to five years.

After each event we approve and publish each registrant's participation information which is assessable to the registrant on our secure website. This information is only used for audit and accreditation purposes.

We also notify and update STAR of all faculty, speakers and faculty roles in planning events.

CHSE ADMINISTRATION FEE

The CHSE Administration Fee covers conference coordination/event management services.

Half Day program: \$2,500 - \$4,500

Full Day program: \$5,000 - \$10,000

Weekend, Evening or Multiple Day program costs are based on need/requirements.

Services include support in program development, knowledge pertaining to accreditation and CMA/Rx&D/PAAB guidelines and ensuring your event complies with all regulatory bodies including The College of Family Physicians, The Royal College of Physicians and Surgeons of Canada, and the American Medical Association.

SUPPORT INCLUDES:

Negotiating, drawing up, and signing off on contracts with suppliers. Ensuring all contract attrition dates are met and liability insurance is in place to cover the planning committee members as well as McMaster University;

Preparing all official requests for funding from potential sponsors and subsequent follow-up of unrestricted educational grants; confirming and processing sponsor income; issuing a tax receipt to each sponsor. Monitoring grant levels while ensuring the appropriate sponsor recognition is provided on day - verbal/visual (at table or PowerPoint slide/in handouts/syllabus) for the program;

Monitoring of event budget, processing internal/external and out of country speakers' expense reports and honoraria payments, suppliers' invoices, and preparation of event interim and final financial statements;

Compiling registration statistics for the planning committee and data for the needs assessment for the following year's planning committee/event;

Preparing an overall comprehensive evaluation report for the current committee, while preparing speaker specific evaluations, with thank you letters;

Booking all meeting spaces/locations. A fire exit plan is in place and the onsite staff know what to do in the event of an evacuation.

Ensuring catering numbers reflect the number of registrants and costs are within budget;

Ensuring all speaker AV needs and program requirements have been provided and met;

Contacting and ensuring speakers have the meeting date and time in their calendars. Ensuring they have travel arrangements made; if not, we will offer to handle arrangements for them. Assisting with room set up, including their specific AV requirements and loading their presentations on day. Booking all hotel accommodations for VIP and General Public. Arranging to have all disclosure documents, honoraria forms, handouts and presentations provided prior to the conference;

Assisting with all advertising materials, including flyer development and production. This can include announcements, conference brochures, listing of your event on CHSE website, 'Events and Rounds', direct mail to target audience, placing a brochure in all active mailboxes as well as previous participants', and posting around hospitals within LHINS 3 & 4. Collecting and acknowledging all abstracts and arrange poster presentations for events that request this support;

Designing and printing a customized evaluation form, and printing the authorized registrant list for participants only;

Collecting handouts and presentations from each speaker; ensuring it is in a format that can be easily accessed on day, i.e. MAC vs. PC or PowerPoint vs. PDF; ensuring that speaker has given permission to reproduce their content for the registrants. Providing our own emergency contact details in the event the speaker is delayed or on route, so they can always communicate with us. For your protection we ask each speaker, that should they have to back out, they are responsible to find their replacement. Assembling all on day registrant materials.

On site management services include: arrival 1.5 hours prior to the event to set up registration, signage, sponsor locations and approve of room set up. Greeting registrants, sponsors, speakers and managing on site registration. We will handle all aspects of the registration table; therefore, 3-5 CHSE staff will be on location at start up. Liaison with facility staff and ensuring that food and space requirements match our registrant totals. Cap all workshop/breakout sessions to facilitate fire codes.

All costs are based on need of the planning committee.





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Fax: 905-572-7099

Website: www.fhs.mcmaster.ca/conted