



Policy & Procedures for Co-Development of Educational Programs

1. Introduction

The CTS occasionally co-develops educational programs with other physician or non-physician organizations in view of benefiting from the expertise of other organizations and developing programs aimed at a broader target audience.

This policy & procedures document aims to ensure that the CTS develops those programs in accordance with the highest ethical standards and consistently complies with the requirements established by the CMA ([Guidelines for Physicians in Interactions with Industry](#)) and the Royal College ([the National Standard for Support of Accredited CPD Activities as well as Administrative and Educational CPD activity accreditation standards.](#)) These Standards are applicable to all accredited Royal College MOC Section 1 group learning activities and Section 3 self-assessment programs and simulation-based activities.

2. Policy

As an accredited provider of the Royal College Maintenance of Certification (MOC) program, the CTS assumes responsibility for the content of any/all programs it co-develops with physician or non-physician organizations and ensures the adherence to National Standards and Royal College requirements. The CTS must be involved in the program planning and design from the beginning stages in the development process. The CTS will not approve programs that have already been developed. The CTS assumes responsibility for ensuring the scientific validity and objectivity of the content of any program.

Consistent with the Royal College principles of accreditation, co-developed education and continuing professional development (CPD) activities must adhere to the following:

- 2.1 The Scientific Planning Committee (SPC) includes members of the target audience. As the accredited CPD provider, CTS must be represented on this committee.
- 2.2 The program is based on a needs assessment that identifies the perceived and unperceived needs of the target audience.
- 2.3 Based on the needs assessment, learning objectives are developed for the program as a whole, and for each individual session. The learning objectives are included in preliminary and final program materials. The learning objectives are distributed prior to the activity to facilitate the participants' ability to determine the relevance of the learning activity to their practice. Learning objectives are written from a learner's perspective and state what a learner will know or be able to do after attending a session.

- 2.4 At least 25 per cent of the total education time is allocated to interactive learning;
- 2.5 A program evaluation and feedback forms are developed and specifically address questions on whether or not the program and individual session objectives were met, and if the sessions were balanced and free from commercial or other inappropriate bias. The evaluations also provide opportunities for participants to identify what they have learned and its potential impact to their practice. It also asks which Can MEDS Roles were addressed during the activity.
- 2.6 CTS and/or the physician organization will disclose to participants all financial relationships of speakers, moderators, facilitators, authors as well as all members of the scientific planning committee (within the past two years) with any for-profit and not-for-profit, regardless of its connection to the topics discussed or mentioned during this event using the CTS Conflict of Interest disclosure form.
- 2.7 Representatives of a commercial sponsor cannot attend the SPC meetings. However, representatives of an organization (i.e. medical communications company) hired for administrative and logistical support can attend the SPC meetings but cannot participate in decisions related to co-developed CPD program elements, including but not limited to learning objectives, program content, speakers, moderators, facilitators, authors, educational methods, evaluation of outcomes etc.
- 2.8 All financial sponsorship for a specific CPD program is submitted in the form of educational grants. A written agreement (MOU) between the CTS and the co-developer as well as the third party, if applicable, outlines the terms and conditions of the sponsorship and how funds will be disbursed, in accordance with the program plans. The co-developer can hire a third party for the administration, promotion and logistical tasks of the event. However, the CTS assumes responsibility for the overall budget and the payment of honoraria, lodging, travel and other expenses to faculty. The SPC cannot be required to accept advice from a sponsor as a condition of receiving financial support.
- 2.9 The program offers a balanced presentation of the prevailing body of scientific information and lack bias.
- 2.10 No drug or product advertisements may appear on, or with, any of the written materials (preliminary or final programs, brochures, or advanced notifications) for this event.
- 2.11 The description of therapeutic options use generic names (or both generic and trade names) and not reflect exclusivity and branding on all presentations and written materials.
- 2.12 "Unapproved" or "off-label" uses of medication and devices must be disclosed during the presentations.
- 2.13 There is full budgetary disclosure. Funding arrangements are consistent with the most recent CMA guidelines¹.
- 2.14 Co-development of the CPD activity is recognized by the following statement on program materials such as preliminary and final scientific programs, promotional materials, certificate of attendance.

"This [program/workshop/seminar] was co-developed by the Canadian Thoracic Society and [name of organization (s)] and was planned to achieve scientific integrity, objectivity and balance."

In addition, the following requirements must be met following program delivery:

- 2.15 A copy of the completed program evaluation forms and/or a summary of those evaluations is provided to the CTS.
- 2.16 A list of the people who attended the CPD program is provided to the CTS; the list should identify the profession of each attendee.
- 2.17 Attendees are provided with a certificate of attendance that includes the following statement:

"This activity is an Accredited Group Learning Activity (Section 1) as defined by the Maintenance of Certification Program (MOC) of The Royal College of Physicians and Surgeons of Canada and approved by the Canadian Thoracic Society. You may claim a maximum of # hours (credits are automatically calculated)."

3. Procedures

- 3.1 A physician or non-physician organization submits a co-development proposal to CTS that includes a general outline of the proposed program, needs assessment and budget, as well as suggestions for potential faculty, etc.
- 3.2 The proposal is reviewed by the CTS CPD Committee (or its successor), and by any other CTS Committee directly affected (ex: disease-specific committee).
- 3.3 If accepted, the CTS and the co-developer develop a Memorandum of Understanding (MOU) outlining mutual responsibilities for the successful development and delivery of the program, CTS accreditation and administrative fees (including a non-refundable deposit) and how funds will be managed.
- 3.4 Once the MOU has been signed by both parties, the CTS appoints 1-2 members to sit on the SPC of the co-developed program. The member(s) participate in developing program content, and evaluation strategies in accordance with the Royal College and National Standards. As in Section 2.7, if co-developing with industry, representatives of industry cannot attend the SPC meetings. However, any third party hired by industry or CTS can attend the SPC meetings but cannot participate in decisions related to program content.
- 3.5 The SPC develops the program content, materials (including slides, overheads, hand-outs) etc. and submits the entire program to the CTS CPD Committee for review.
- 3.6 An expert review panel is then assigned by the CTS to ensure that the program is appropriate and in compliance with Royal College and National standards. This step may be by-passed when the SPC is comprised of content experts who are CTS members. Based on the expert review, changes to the program may be required before the program is submitted to the CTS CPD Committee for final approval.

- 3.7 Once the program is deemed ready for accreditation, it is submitted to the CTS CPD Committee. The submission must include:
- 3.7.1 CTS Accreditation Application Form for Section 1 Group Learning Activity or Section 3 Self-Assessment Activity;
 - 3.7.2 Summary of the Needs Assessment;
 - 3.7.3 Documentation of the Program Development (minutes, reports, copy of correspondence between planning committee members);
 - 3.7.4 Draft Program Brochure featuring:
 - The activity schedule, indicating duration for interactivity
 - Learning objectives for the overall program and for each session describing what the participants will be able to do differently after attending the activity
 - SPC members' names and credentials
 - 3.7.5 Any promotional materials
 - 3.7.5 Template Program Evaluation Form;
 - 3.7.6 Template Certificate of Attendance;
 - 3.7.7 Sample Conflict of Interest Disclosure forms for SPC, faculty, speakers, moderators;
 - 3.7.8 Budget and list of sponsors;
 - 3.7.9 Presentation Material (copies of slides, if possible, and hand-outs).
- 3.8 Should the CPD Committee not approve the program, it can be re-submitted following recommended modifications.
- 3.9 If the program is approved, co-development of the continuing professional development event by the CTS (accredited provider) must be recognized on program materials. Program materials must include the following statement:
- "This activity is an Accredited Group Learning Activity (Section 1) as defined by the Maintenance of Certification Program (MOC) of The Royal College of Physicians and Surgeons of Canada and approved by the Canadian Thoracic Society. You may claim a maximum of # hours (credits are automatically calculated)."*
- 3.10 If the content of a program is changed, it must be re-submitted for accreditation.ⁱⁱ

4. Administration

This policy will be reviewed by the CTS CPD Committee (or its successor) at least once every five years and will be submitted to the CTS Board of Directors for approval.

ⁱ CMA Guidelines for Physicians in Interactions with Industry (2007)

ⁱⁱ CMA Guidelines for Physicians in Interactions with Industry (2007) No. 40 If the content of eCPD modules is changed, re-accreditation is required.