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## **Policies and Guidelines for Co-Development under Section 1 Accredited Group Learning Activities *Non-Physician Organizations***

### **Introduction**

The Canadian Association of Physical Medicine & Rehabilitation (CAPM&R) is a recognized provider of continuing professional development (CPD) credits under the Maintenance of Certification (MOC) program of the Royal College of Physicians and Surgeons of Canada (RCPSC). Both the Policies/Guidelines document and the Co-Development Application Form for credits under Section 1 of the MOC program of the RCPSC are developed and maintained by the Continuing Professional Development Committee of the CAPM&R.

**Please read this document carefully prior to completing the Co-Development Application Form for the accreditation of an educational program.**

Non-physician organizations who have identified the opportunity to co-develop educational activities with the CAPM&R should contact the CAPM&R to discuss potential educational activities ***before planning*** their sessions/events.

### **Definition of Co-Development as per the RCPSC**

*The process by which two or more organizations, at least one of which must be a physician organization, prospectively collaborate to develop and implement an accredited educational activity, learning resource or tool.*

## **Application Guidelines**

CAPM&R will consider your request for co-development with the understanding that the following be submitted with your application:

- ✓ Organization profile and list of organizations participating in the event or planning
- ✓ Event Profile Outline
- ✓ Identified target audience(s)
- ✓ List of Planning Committee members (pharmaceutical representatives are not eligible to sit on Planning Committees) and their role on the Committee (ie. subject matter expert, demographic, etc.)
- ✓ Identification of how perceived and unperceived needs were assessed and identified
- ✓ List of learning objectives for the overall event as well as individual sessions
- ✓ Preliminary event schedule (including location of event, accommodations, food & beverage, AV company, etc.)
- ✓ Preliminary budget outline
- ✓ Proposed evaluation methods

## **Process for Accreditation**

Once the program has been co-developed, an electronic copy (PDF or Word) of the following documents will be administered via the physician organization (working with the non-physician organization) for accreditation:

- ✓ Co-Development Application Form (including all supporting documents) signed by the CAPM&R Planning Committee representative(s) – ideally 8 weeks
- ✓ Needs assessment summary
- ✓ Documentation on program development (e.g., minutes, reports, Planning Committee Documentation, etc.);
- ✓ Completed and signed disclosure statements for all faculty and also Planning Committee members
- ✓ Evaluation forms
- ✓ Copies of all faculty presentations (to be submitted separately from the above items) – no later than 30 days from the end of the event/session

## Organization Profile

### Definition of a Non-Physician Organization

- Disease-oriented patient advocacy organizations (e.g. Canadian Diabetes Association)
- Government departments or agencies (e.g. Health Canada, Public Health Agency of Canada)
- Industry (e.g. pharmaceutical companies, medical device companies, etc.)
- Medical education or communications (MEC) companies (e.g. CME Inc.)
- 'For-profit' on-line educators, publishing companies or simulation companies (e.g. Medscape, CAE)
- Small number of physicians working together to develop educational programming

In order to determine your type of organization, the CAPM&R requires some background information. In your application, please provide links to pages on your website which identify an overview of the organization, including its governance structure and if applicable how it is accountable to its members. If this information is not available on your website, please include supporting documents which supply this information.

If the event is being presented in partnership with another non-physician organization, the application must be submitted through one organization only.

All involved organizations are to be identified and must meet the standards as identified by the CAPM&R's Code of Ethics.

## Event Profile

In this section, please include all the requested information for your sessions/events.

### Program Outline

1. The subject/topic area should tie into the CAPM&R's overall areas of interest.
2. The program should be based on balanced scientific evidence.
3. Reflective of appropriate target audiences.

### Mandatory Educational Criteria for all MOC Section 1 Approved Programs

The following educational criteria must be incorporated within the educational activity in order to meet the requirements for accreditation.

## Criteria 1: Target Audience(s) & Planning Committee

### Target Audience(s)

When identifying your target audience(s) for the program, please be as specific as possible (ex: “residents, family physicians, physiatrists” versus “MDs”). The target audience must match closely that of the CAPM&R’s.

### Planning Committee

Once the CAPM&R has accepted the co-development request, CAPM&R will identify one or more individuals with expertise in the subject matter who will sit on the Planning Committee. The CAPM&R representative(s) are responsible to ensure that the program is:

- Relevant to PM&R and other topics identified as it relates the members perceived and unperceived needs
- Cutting-edge and evidence-based and presenting a balanced view of the subject matter
- Presented by faculty that are unbiased and that address the learning objectives
- Developed in keeping with CAPM&R’s guidelines and policies as well as the CMA and RCPSC Guidelines.

When listing the planning committee, please include the members’:

- Name;
- Role on the committee;
- City and province of practice;
- Profession; and
- Specialty (if applicable).

No members of industry (even if they are practicing health care professionals) may participate on the Planning Committee.

### Conflict of Interest

Like speakers, Planning Committee members must be vetted for possible conflicts of interest prior to beginning program development. When submitting your application please include a copy of the disclosure statement that was provided to Planning Committee members.

## Criteria 2: Needs Assessment

Whenever content is co-developed for an event or session, it is essential to determine who the target audience(s) is. What is even more critical is determining the target audience's educational needs. Uncovering these needs can be done using needs assessment.

A needs assessment consists of identifying perceived and unperceived needs, which can be discovered by collecting data from a number of sources. The methods used to gather data is often dependent on the target audience and subject matter.

Below are suggested sources that can be considered to assess the target audience's perceived and unperceived needs.

### **Perceived Learning Needs**

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

### **Unperceived Learning Needs**

- Self-assessment tests
- Chart audits
- Chart stimulated recall interviews
- Direct observation of practice performance
- Quality assurance data from hospitals, regions
- Standardized patients
- Provincial databases
- Incident reports
- Published literature

A needs assessment should include basic demographic information such as the city or province as well as the urban/rural designation of the attendees' practice; the attendees' age or age range; and level or type of practice.

## Criteria 3: Learning Objectives

Learning objectives must be derived from the identified perceived and unperceived needs of the target audience(s).

Learning objectives must be written from the learner's perspective. They should clearly state what a participant will know or be able to do as a result of attending an event or session. A learning objective typically completes a statement like the following:

At the end of this session, participants will be able to \_\_\_\_\_

or

Upon completion of the conference, participants should be able to \_\_\_\_\_

Next, your statement needs an action verb describing what the participant will be able to do or the action they will be able to undertake. Avoid using vague or abstract words like believe, value, appreciate, be aware of, be familiar with, etc.

Complete the statement with the details of what the participant will be doing when they are demonstrating the action. The details should be specific and refer to the outcome of the learning objective.

**Effective verbs:** [list of verbs for formulating learning objectives](#).

### Examples

For personal knowledge management

At the end of this session, participants will be able to

- identify skills related to the creation and use of knowledge that is relevant and important to them;
- describe the knowledge transfer/translation process when dealing with information; and
- apply methods that will allow for the creation, gathering, distribution and use of knowledge and information.

For gap analysis

At the end of this session, participants will be able to

- differentiate between subjective and objective needs assessment and describe the importance of both;
- use methods to identify the gap between current and desired skill/competency; and
- access resources to assist in filling in areas where a gap in knowledge or skill has been identified.

Learn More: [Writing learning objectives](#) & [Learning outcome objectives](#)

## Criteria 4: Educational Format and Interactivity

### Educational Format

The co-development of the educational format should be designed to best present the content. For example, for controversial materials, a debate may be an appropriate format. For content based on inter-professional issues, small group breakout groups may be appropriate. For skills development, simulation or performance assessment activities may be appropriate.

Additional information on educational formats can be found on the Royal College of Physicians and Surgeons of Canada [Website](#)

At least 25% of the total education time for the educational event (that is 15 minutes per hour) should be given over to discussion and interaction.

Interactivity If it is not included in the program material provided, please include a description of how this interactivity requirement will be met. If the event is divided into multiple parts (programs, plenary sessions, breakout sessions, etc.) please include this information for each session for which it is available. All educational delivery methods chosen should have an element of interactivity that accounts for at least 25 per cent of the event or session. Read more on [Interactive Learning in Continuing Professional Development: "at Least 25 Per Cent of Time"](#)

### Criteria 5: Evaluation and Feedback

The session/event must include an evaluation of the established learning objectives and provide opportunities for participants to identify what they have learned and its potential impact for their practice. If the education event is divided into multiple parts (programs, plenary sessions, breakout sessions, etc.) each session must be evaluated for the above criteria.

Evaluation forms must evaluate (at minimum):

- Were the learning objectives met?
- What (if any) was the impact on the participants practice?
- Was there adequate time dedicated to interactive learning?
- Was the program free from commercial bias?

## Evaluation Checklist

Criteria	Yes	No	Sample Questions
Does the evaluation strategy measure the teaching ability of the presenter (s)			Please rate [presenter A] on their [clarity, engagement, A/V aids, etc.]
Does the evaluation strategy measure the relevance of the course content in relation to the target audience's learning needs?			Was this topic relevant to your educational needs?
Does the evaluation strategy measure if the session filled any gaps in knowledge?			Did this presentation assist in filling any gaps in your knowledge?
Does the evaluation strategy evaluate if learning objectives were met?			Did this session meet the learning objectives that were identified?
Are there opportunities for participants to identify and/or reflect on what they have learned?			What new knowledge or skills are you able to take away from this session?
Does the evaluation strategy evaluate if commercial bias was present?			Was industry bias present in this session?
Does the evaluation strategy evaluate if appropriate time was dedicated to interactivity?			Was there enough time dedicated to interactivity (e.g. hands-on activities, discussion groups, Q & A sessions) in this session
Does the evaluation strategy intend to measure improved participant performance?			Will you apply the knowledge/skill learned in this session to your practice? If yes, how? If no, why?

As each program may differ in scope, evaluation forms may need to be modified to receive the best information from your target audience.

You may also use this opportunity to further define future educational needs participants may have identified while attending the event by offering a "comments" box.

## Criteria 6: Ethics and Finance

It is the responsibility of the physician organization (working with the non-physician organization) to ensure that any potential conflicts of interest are declared by faculty/speakers, moderators, and members of the Planning Committee, and are conveyed to the respective audience within the printed/online program and as a second slide as part of the presentation. The second slide should be displayed for an appropriate amount of time for participants to read.

Members of industry (even if practicing) cannot participate on the Planning Committee.

Any direct financial assistance provided directly to physicians to reimburse them or their families for attending an educational event would result in non-approval of this application.

All travel, accommodation, per diem and honoraria must be administered by the physician organization (working with the non-physician organization) according to their own financial policies. Faculty must submit their expenses to the physician organization for reimbursement within thirty (30) days of the event. The physician organization would then invoice the codeveloping organization(s) for these expenses (travel, accommodation, per diem and honoraria) after the event.

All funding received in support of the educational event are to be disclosed in the “projected budget” provided with your application.

### **Policies for the use of the CAPM&R Accreditation Statements**

No reference may be made to the CAPM&R or its CPD approval system prior to the actual notification that the Co-Development Application has been approved for credits under Section 1 of the MOC program. Do not state “MOC/CPD accreditation pending” or similar wording in any preliminary documentation relating to the learning activity.

Once the education program has been accredited, the accreditation statements must be incorporated within all program publications and advertisements.

Promotion of the event is the responsibility of the non-physician organization. All promotion must follow the Canadian Medical Association’s (CMA) and RCPSC guidelines. All promotional material must include the CAPM&R accreditation statement and the logo of the physicians and non-physician organizations.

The CAPM&R will be responsible to report to the Royal College of Physicians and Surgeons of Canada that the event is has been approved for credits under Section 1 of the MOC program.

## **Accreditation Statement for Educational Events Developed by a Physician Organization**

“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 and approved by the Canadian Association of Physical Medicine & Rehabilitation for a maximum of “xx” credits.”

**Co-development statement:** This “Course” was co-developed with the Canadian Association of Physical Medicine & Rehabilitation and was planned to achieve scientific integrity, objectivity and balance.

“Tagging” and Sponsorship Recognition Tagging is the linking of sponsorship funding to a specific session within an accredited group learning event. **This is not permitted.**

All sponsorship funds for accredited group learning events must be received as an educational grant and included as a source of revenue within the overall budget supporting the event in its entirety.

All organizations providing educational grants must be acknowledged as supporting the entire event. As an example, a summary page can be created recognizing the contribution of all sponsors.

Purely non-educational activities, such as delegate meals, may be ‘tagged’ but must not be included as part of an accredited group learning event.

## Criteria 7: Framework of Continuing Professional Development Activities

This table summarizes the learning sections under the new MOC framework. Activities submitted via MAINPORT are converted automatically into credits. Fellows and MOC Program participants are required to complete a minimum of 25 credits per cycle in each section of the MOC Program.			
SECTIONS	CATEGORY	EXAMPLES	CREDIT RATING
<b>Section 1: Group learning</b>	<b>Accredited activities:</b> Conferences, rounds, journal clubs or small-group activities that adhere to Royal College standards. Accredited group learning activities can occur face-to-face or web-based (online).	<ul style="list-style-type: none"> <li>• Accredited rounds, journal clubs, small groups</li> <li>• Accredited conferences</li> </ul>	1 credit per hour
	<b>Unaccredited activities:</b> Rounds, journal clubs or small-group activities in the process of meeting the educational and ethical standards; rural or local conferences that have no industry sponsorship.	<ul style="list-style-type: none"> <li>• Unaccredited rounds, journal clubs, small groups</li> <li>• Unaccredited conferences without, industry support</li> </ul>	0.5 credits per hour (maximum of 50 credits per cycle)
<b>Section 3: Assessment</b>	<b>Knowledge assessment</b> Programs accredited by Royal College CPD providers that provide data with feedback to individual physicians regarding their current knowledge base to enable the identification of needs and the development of future learning opportunities relevant to their practice.	<ul style="list-style-type: none"> <li>• Accredited self-assessment programs</li> </ul>	3 credits per hour
	<b>Performance assessment</b> Activities that provide data with feedback to individual physicians, groups or interprofessional health teams related to their personal or collective performance across a broad range of professional practice domains. Performance assessment activities can occur in a simulated or actual practice environment.	<ul style="list-style-type: none"> <li>• Simulation</li> <li>• Chart audit and feedback</li> <li>• Multi-source feedback</li> <li>• Educational/administrative assessments</li> </ul>	3 credits per hour

## Post Event Activities

Once the program has been held, the non-physician organization must provide CAPM&R with:

- A Report of all evaluations and copies of completed evaluation forms.
- A list of perceived and unperceived needs.
- A complete list of attendees, including mailing and e-mail addresses.
- The CAPM&R is responsible to issue and distribute the certificates of attendance to participants.

## Process and procedures for accreditation

Please submit this application, including payment, **at least 8 weeks** in advance of the intended date to advertise the approved CPD activity. Although we may at times “fast track an application”, additional processing fees would apply.

Please ensure that the Co-Development Application Form is complete and includes all the information and the signatures required. Incomplete applications will lead to a delay in the accreditation process.

The applicant will abide by the CMA’s Policy, [Guidelines for Physicians in the Interaction with Industry](#), and/or the Relations between Medical Organizations and Business Corporations guide developed by [Conseil québécois de développement professionnel continu des médecins](#).

The information contained in the application shall be the work-product of the Planning Committee Chair (or Co-Chairs), who shall be responsible and accountable for compliance with the requirements for approval. The CAPM&R reserves the right to request additional information to assist in the review.

## Fee Schedule

Please see the most current prospectus [www.capmr66.ca](http://www.capmr66.ca) for the rates for co-development in the annual conference.

If for another purpose:

- MOC Section 1 - \$1,000 to review the application
- MOC Section 1 - \$8,000 once application has been accepted

## Application deadline:

Your application must be submitted to the CAPM&R a minimum of 10 weeks in advance of the intended date to advertise the approved CPD activity. Although we may at times “fast track an application”, additional processing fees would apply.

**How to apply:** Please fully complete this application and submit to [info@CAPM&R.org](mailto:info@CAPM&R.org) attention Heather Dow, CPD Accreditation.

Contact: For more information, or if you have questions, please contact Heather Dow at [info@CAPM&R.org](mailto:info@CAPM&R.org) or 1-613-507-8528