**Guide to Organizing a Course**

**Introduction**

Welcome to Boston Children’s Hospital Continuing Medical Education Department (CMED). Throughout this document you will find frequently asked questions, responsibilities of the CME Department, information about our accreditation and how to plan your own activity.

**Activity Planning Policies/Responsibilities**

Boston Children’s continuing education is responsible for the accreditation review and approval, registration, marketing (additional charges apply), evaluation, credit tracking, and certificates. In order to ensure that all requirements mandated by the ACCME, ANCC and ACPE are met, the following guidelines are presented to assist applicants in preparing a continuing education application for credit.

* All applications must be submitted a minimum of 8 week prior to the intended activity date. Credit cannot be awarded retroactively. If you would like the CME Department to market your course, completed applications must be delivered to the CME Department no later than 4 months for local programs, 6 months for national programs and 12 months for international program prior to the start of the activity. These dates will help ensure we can market your program in a timely manner.
* Each proposed program must:
  + Clearly identify at least two gaps - What is the problem/fact that you want to address?
  + Documentation for each gap - How do you know that the problem/fact exists?
  + Need - Why does it exist?
  + Objectives - How do you plan to change it?
  + Measurement process - Were you effective in making a change? Does the problem still exist? Were there any barriers preventing change?
* A Planning Committee comprised of at least three members actively involved in the development and organization of the program will be necessary. The committee must include one member of each discipline of your intended target audience. For example, if you are looking to get physician, nursing and pharmacy credits for your course you will need to have a minimum of one physician, one nurse and one pharmacist on your planning committee.
* Disclosure/Attestation Statements must be generated and signed by the course director, planning committee members, and all speakers. Electronic disclosures are available if the application is submitted with an excel document with first name, last name, degree and email address at the time of application submission.
* Precise and accurate accreditation language must appear on all program brochures, flyers or announcements. All marketing and/or distributed materials must be created by the CME Department or approved by the CME Department. To submit materials for review, email the documents to [cmedepartment@childrens.harvard.edu](mailto:cmedepartment@childrens.harvard.edu)
* An evaluation must be utilized to assess whether or not the objectives of the activity were met. The CME Department will be responsible for sending the evaluation to all attendees, unless otherwise discussed ahead of time.
* A specific program schedule (including lecture times, topics, speakers, and degrees) must accompany the application. RSS is required to update their schedule with the frequency of your course (i.e. if you have a monthly course, you need to update your schedule on a monthly basis)

**Committee Review and Approval**

Once the Joint Accreditation continuing education application is submitted to [continuingeducation@childrens.harvard.edu](mailto:continuingeducation@childrens.harvard.edu) , the document will be presented to the appropriate review committee for review and consideration of accreditation approval. Physician only courses will go to the CME Department, nursing only courses will go to nursing professional development, and pharmacy only courses will go to the pharmacy department. Jointly accredited courses will be sent to selected members of the Interprofessional Continuing Education (IPCE) Committee for review and approval.

The IPCE Committee meets on a monthly basis. Applications are presented to the Committee for approval at that time. Individual activity directors may be asked to attend the IPCE Committee meeting and respond to any questions concerning the activity before credit is designated. If edits are necessary, the IPCE Committee will provide edits necessary for approval.

**Continuing Education Responsibilities**

The CME Department will assume responsibility for the following activity tasks of physician only courses and jointly accredited courses:

|  |  |
| --- | --- |
| **Service** | **Description** |
| **Instructional Design and Consulting** | * Meet in-person with course directors to orient them to the accreditation process * Give recommendations and guidance on educational content, course development and format, academic and administrative issues   + Development help of gap analyses, needs assessment and learning objectives   + Outcome/Impact Assessments   + Choice of format or venue     - Live Conference     - Regularly Scheduled Series (RSS)     - Online Webinars (Live or On Demand)     - Online Maintenance of Certification Part II self-assessment examinations * Provide guidance to comply with ACCME, ANCC, ACPE, and BCH continuing education standards and regulations (including those related to conflict-of-interest disclosure and conflict resolution) * Facilitate and manage a faculty academic peer-review process for new course proposals * Provide recommendations of local venues if Boston Children’s does not meet requirements * Address ongoing course director questions and requests for information |
| **Accreditation** | * Calculate and assign maximum number of *AMA PRA Category 1 Credits™,* ANCC Contact Hours, and ACPE Contact Hours * Review educational content for Massachusetts Board of Registration in Medicine requirements for credits in Risk Management Study, including Opioid Education and Training and End-of-Life Care studies * Review course disclosure and resolution of conflict-of-interest information to ensure compliance with ACCME, ANCC, ACPE, and Boston Children’s continuing education standards and regulations * Review Syllabus Disclosure Statement to ensure compliance with ACCME, ANCC, ACPE, and BCH continuing education standards and regulations * *Optional: complete application for AAFP accreditation (an additional $500 fee applies for AAFP and BCH continuing education review and application)* |
| **Disclosures** | * All disclosures must be submitted to the CME Department prior to the start of the activity. * Paper disclosures: must be submitted within one month of the activity * Electronic disclosures: a spreadsheet with first name, last name, email and degree must be submitted at time of application |
| **Marketing Services** | * Provide three tiers of marketing that will best meet conference needs * Review course marketing materials (landing pages, websites, brochures, direct mail letters, emails, flyers, etc.) for compliance with ACCME, ANCC, ACPE, AMA, and Boston Children’s continuing education standards and regulations.   *\*Please note that all marketing materials for Boston Children’s accredited courses must be first reviewed and approved by CMED. This review is for ACCME, ANCC, ACPE and BCH continuing education standards and regulations compliance only.* |
| **Registration and Customer Support** | * Respond to inquiries about general course information and provide post-course telephone and on-line support for customer inquiries * Open and close course registration period * Process learner registrations/payments for courses, including those with optional educational tracks and workshops * Provide course directors with regular status reports on registration data * Prepare attendance roster for each course * Manage wait-lists for fully booked courses |
| **Evaluation** | * Develop course-specific evaluation surveys in line with Joint AccreditationTM requirements * Work with course director to edit and refine questions important for non-accreditation purposes * Set up and distribute survey to attendees * Process and report survey results to course director |
| **Credit Tracking** | * Review and attest to credits earned by attendee * Provide transcripts for all attendees in CloudCME for re-licensure purposes |
| **Learner Certificates** | * Create and electronically distribute continuing education certificates to clinicians (upon request) * Create and electronically distribute Certificates of Attendance to other healthcare professionals (upon request) |
| **Legal** | * Review any necessary documents with Legal. |
| **Educational Grants** | * Work with Boston Children’s Trust to:   + Track and communicate grant application status   + Set-up funds with Finance for grants   + Guidance of where to distribute grants to appropriate expenses |

*ACCME, ANCC, ACPE and Continuing Education Policies and Procedures*

Most importantly, the course director should be familiar with all ACCME, ANCC, ACPE and CMED policies and procedures that govern the development and compliance of CME activities at the hospital.

**Curriculum Design**

A strong curriculum lays the groundwork for successful continuing education event. Your curriculum should address your learners’ needs and their resources, and should include three components:

* Clear educational objectives: What will your participants learn? What are the goals of your learners?
* Detailed instructional methods: How will you teach them this material?
* Integrated feedback mechanisms: How will you determine what they learned?
* Educational grants often require these materials as well.

*Assess Learner Needs*

Identify the major problem your program will address. Demonstrate its scope and importance with hard data, including references and/or statistics.

* Are clinicians obtaining inadequate information from patients?
* Are treatments for a condition applied inconsistently?
* How does the current situation fall short of an ideal situation?
* If the problem is solved, how will patient care or patient outcomes affected?

*Identify Your Learners’ Needs*

Think about the healthcare professionals you want to target and describe the specific education gap your program will fill. Use data to support your claims in this section as well. Show that an education gap exists, and show its effects on patient care and outcomes.

* What resources do your targeted learners already have?
* How does your proposed content fit their scope of practice?

To dive deeper into your learners needs, a continuing education activity or intervention develops from an idea based on identified professional practice gaps and the educational needs underlying those gaps. There may be many reasons a gap exists but continuing education is concerned with those educational needs that may help cause the gap, whether it is knowledge (possession of the relevant information), competence (ability to do something, intention to implement practice strategies), or performance (actual implementation in practice). The continuing education activity or intervention is designed to address those needs and thereby help close the gap. Our course directors are asked to find needs from a number of different sources:

* 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 affecting patient care
  + New guidelines or national standards
* Verbalized needs may be derived from the following:
  + Subjects 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. These needs may be derived from the following:
  + Epidemiological data
  + Quality assurance/audit data
  + Re-credential review
  + Morbidity/mortality data
  + Infection control data
  + Surgical procedures data
  + Professional society requirements
  + Residency training and competency requirements
  + Journal articles/literature citations
  + News media

**Planning Program Details**

A well-organized environment dramatically improves your learners’ experience. Plan out your program’s details well ahead of time and review your plan shortly before your activity takes place. Revise, clarify or add to your plan as needed. Your evaluations will reflect the time you spend planning.

How will you communicate the program’s objectives to your learners? Outline exactly what material you will cover and the teaching methods you will use. If your activity includes multiple speakers or several events over a period of time, how will you build these elements into a single, meaningful program? How will you address unexpected events, such as delayed speakers, faulty equipment or questions outside the program’s scope?

**Budgeting/Funds**

If your department would like to put on a continuing education event, please speak to the head of your department to see if there is any budget available before you begin the planning process. Funding will need to come from the sponsoring department.

Example: If this is a neurology course, the neurology department would be the sponsoring department.

**Commercial Support:**

If you are interested in commercial support for this continuing education event please contact [continuingeducation@childrens.harvard.edu](mailto:continuingeducation@childrens.harvard.edu) to learn more about the policies in place. Commercial support would be considered any sort of donation, monetary or in-kind that is given to the medical director to use at the continuing education event. Joint Accreditation follows the ACCME Standards for Commercial Support; all requirements for using commercial support are listed below:

1. A commercial interest is defined by the ACCME as “any entity producing, marketing, re-selling, or distributing health care goods or services consumed by, or used on, patients.” The ACCME does not consider providers of clinical service directly to patients to be commercial interests.

2. Independence: All aspects of the design and implementation of an educational activity, accredited for continuing education credits, must be made free of the control, or suggestion, of commercial interests. This includes:

a. Identification of the needs assessment

b. Identification of educational objectives

c. Selection of speaker and content

d. Selection of educational design

e. Evaluation of the activity

f. Selection of persons in position to control educational design and content

\*\* This means the commercial interest is allowed to provide monetary support and nothing else.

A commercial interest providing support in the form of an unrestricted educational grant may not act as an agent providing a continuing education activity to learners, e.g., distribution of self-study CME activities or arranging for electronic access to continuing education activities

3. Resolution of potential conflict of interest: This requirement applies to all educational activities accredited for continuing education. All speakers and planners must provide a disclosure that includes support from commercial interests received within the 12 month period prior to the activity. In cases where a speaker or planner discloses a potential conflict of interest a planner or the program director, who has no financial relationships to disclose, must manage the potential conflict of interest by completing a “speaker’s checklist” (provided by the CMED office)

a. All speakers and planners must disclose, to the audience, whether or not they have a financial relationship(s) with a commercial interest(s) prior to the activity. The education provider must be able to document that the appropriate disclosures have been made.

4. Appropriate use of commercial support: The education provider must make all decisions regarding disposition and disbursement of funds received in an unrestricted educational grant from a commercial interest. There MUST be a letter of agreement in place, signed by a representative of the commercial interest, the education provider, and the accredited provider (CMED), that outlines the terms and conditions of the support. The letter of agreement must be signed in advance of the activity and a fully executed copy of the agreement must be submitted to [continuingeducation@childrens.harvard.edu](mailto:continuingeducation@childrens.harvard.edu).

Support from commercial interests must be acknowledged prior to the beginning of the activity and must be referred to as “support” and never “sponsorship.” Acknowledgement must be documented. Documentation includes: a slide from the beginning of course, introduction speaker notes, etc.

Unrestricted educational grants for continuing education activities must be sent to the education provider or the accredited provider. A commercial interest may NOT pay expenses associated with a continuing education activity directly to a vendor or speaker under any circumstances. (This includes providing food or other enticements for a continuing education activity)

Educational materials that are part of a continuing education activity, such as slides, abstracts and handouts, cannot contain any advertising, trade name or a product-group message.

**Grants**

If you are interested in receiving grants (this would mean also using commercial support) please email [continuingeducation@childrens.harvard.edu](mailto:continuingeducation@childrens.harvard.edu) to get started. This process needs 6-9 months to be completed properly.

**Working with Boston Children’s Hospital Trust**

If you are considering receiving commercial support for your continuing education activity, please email [continuingeducation@childrens.harvard.edu](mailto:continuingeducation@childrens.harvard.edu) to move forward with this process. We will assist you in ensuring that all guidelines are met. In addition we will also connect you with a Boston Children’s Hospital Trust representative to assist you in commercial support outreach and agreement creation.

**Contact Information:**

Please email us at: [continuingeducation@childrens.harvard.edu](mailto:continuingeducation@childrens.harvard.edu)

OR

Call us at: (617) 919-9908 (internally 4-9908)