



TEMERTY FACULTY OF MEDICINE  
UNIVERSITY OF TORONTO  
Continuing Professional Development

# **ENSURING EXCELLENCE IN CPD:**

# **A GUIDE FOR SCIENTIFIC PLANNING COMMITTEES AT THE UNIVERSITY OF TORONTO**

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## OVERVIEW AND OBJECTIVES

All University of Toronto accredited CPD programs and conferences must have a Scientific Planning Committee (SPC). The SPC works to meet the educational needs of healthcare professionals and patients, and advance the transfer of knowledge to practice. SPCs are essential for high quality CPD programming and responsible for ensuring that educational programs adhere to the national accreditation standards.

The SPC must be led by a Program Director or Conference Chair who holds an academic appointment in the Faculty of Medicine at the University of Toronto. The SPC must have representation from the intended target audience/s.

At the University of Toronto, the SPC is responsible for general oversight of all components of the CPD program and for making decisions relating to program/conference elements including:

- identification of educational needs of the intended target audience
- development of learning objectives
- selection of educational methods
- selection of speakers, moderators, facilitators, authors
- development and delivery of content
- evaluation of outcomes
- logistics and financial management
- having a process in place for reviewing and mitigating conflict of interest disclosures
- ensuring sponsorship support and programming comply with accreditation standards

## COMPOSITION OF THE SCIENTIFIC PLANNING COMMITTEE

The SPC consists of the following individuals:

- A Program Director (or Conference Chair) who is an appointed faculty member at University of Toronto
- Co-Program Director (or Conference Chair) - if applicable
- Members (who must include representatives of target audience/s)

There is no maximum number of members permitted to sit on the SPC.

Further requirements:

- For Royal College of Physicians and Surgeons of Canada (RCPSC) MOC accreditation: a specialist physician who is a member of the RCPSC must be represented on the SPC
- For College of Family Physicians of Canada (CFPC) Mainpro+ accreditation: a family physician who is a member of the CFPC must be represented on the SPC

## KEY RESPONSIBILITIES OF THE SCIENTIFIC PLANNING COMMITTEE

### A. PROGRAM DEVELOPMENT

It is the responsibility of the SPC to follow CPD educational practices as identified by the Royal College and the CFPC.

The following planning cycle is a useful tool for developing an accredited CPD program. CanMEDS roles should be integrated throughout the planning cycle.

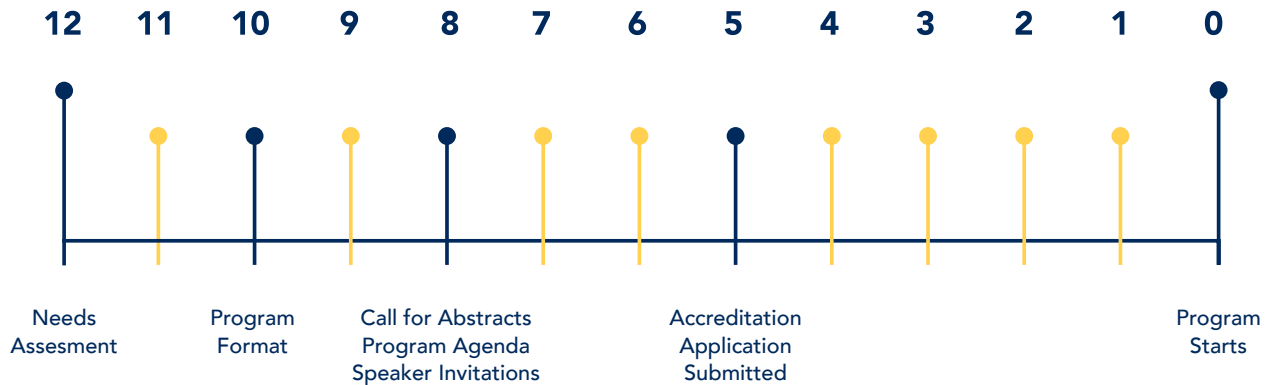
### THE PLANNING CYCLE:



1 The Planning Cycle is adapted from David E. Kern's Six-Step Guide to Curriculum Development (one of the seminal studies of curriculum development in Continuing Medical Education) and other guidance documents listed under Resources.

## RECOMMENDED PLANNING CYCLE TIMELINES

### Timeframe for Component Completion (months)



Note: Once accreditation has been approved, programs and conferences can be advertised as such. They will be advertised on the CPD, Royal College and/or CFPC website.

The CPD office has developed Quick Tip guides to support the steps of the Planning Cycle. All Quick Tip guides are shared on the CPD website: <https://www.cpd.utoronto.ca/educators/program-development/quick-tips/>. The following are introductions to several of the key elements.

### NEEDS ASSESSMENT

Accredited CPD programs and conferences must be planned to address the educational needs of the intended target audience/s, whether that be practicing health care providers, faculty, trainees, or students. A comprehensive needs assessment must be conducted that identifies both perceived and unperceived learning needs. A learning need is defined as the gap between a learner's current knowledge, skills, and/or attitudes and their competency relative to current evidence or clinical practice standards. Learning needs can be perceived ('I know what I need to know'), and unperceived ('I don't know what I don't know'). SPCs are strongly encouraged to use multiple sources of information to inform the needs assessment.

For more on conducting a learning needs assessment including a list of data sources for identifying unperceived needs, see [CPD's Quick Tip on Assessing Learning Needs](#).

## **PROGRAM LEARNING OBJECTIVES**

The overall program/conference learning objectives must be determined by the SPC before selecting the speakers and determining the content and format for individual sessions. Program learning objectives are brief statements that articulate what participants will be expected to do differently after having completed the program or conference. The objectives must be developed without sponsor influence. They are useful in helping participants to choose the appropriate programs for their learning needs. The program objectives are also helpful for speakers as they will help them to clarify the content they will include in their session, and to establish a framework for evaluating effectiveness and outcomes. Each speaker should have specific learning objectives for their session that are in alignment with the overall program learning objectives.

The CPD office has developed a template speaker invitation letter for SPCs to aid with communicating this information to speakers. The [speaker letter template](https://www.cpd.utoronto.ca/educators/) is available on the CPD website: <https://www.cpd.utoronto.ca/educators/>.

For further guidance on developing program learning objectives, see [CPD's Quick Tip on Writing Goals and Learning Objectives](#)

## **PROGRAM CONTENT AND SELECTION OF TOPICS AND SPEAKERS**

The selection of topics, speakers, and educational materials are entirely the responsibility of the SPC. All speakers must be identified by the SPC and invited by the Program Director or Conference Chair.

It is the responsibility of the SPC to ensure programs are fair and balanced. The content and materials provided by speakers should provide (where applicable) a balanced view across all relevant options related to the content area. Content must be based on scientific evidence and free of sponsor influence. Description of therapeutic options must utilize generic names and not reflect exclusivity and product branding. In those circumstances where there is only one product or drug, a fair assessment must be presented to learners.

The SPC must also ensure that speakers utilize innovative and interactive learning methods. The learning delivery/format is to be in alignment with the learning needs and program objectives. U of T accreditation requires a minimum of 25% of the total education time of each session to be allocated for interactive learning. For more guidance see, [CPD's Quick Tip on Choosing Instructional Methods](#).

## **PROGRAM EVALUATION**

All U of T Accredited CPD programs or conferences must have a mechanism for learners to evaluate the individual sessions and overall CPD activity. The Royal College and the CFPC have a number of mandatory evaluation questions, including:

- Were the stated learning objectives (for each individual session and overall activity) met?
- Was the content balanced?
- Was the content free of sponsor influence or other inappropriate bias?
- What was the impact of the CPD activity for your practice?

[These questions were adapted from Royal College CPD Activity Accreditation Standards for Section 1, Educational Standard 5]

The evaluation form template must be submitted as part of the accreditation application, and a summary of evaluation results is to be submitted to CPD at the conclusion of the program or conference. The program evaluation summary also acts a source of information for this program's subsequent learning needs assessments. For more guidance on how to develop evaluations to measure learning outcomes, see [CPD's Quick Tip on Program Evaluation](#) and [Sample Evaluation Template](#)

## **B. ETHICAL STANDARDS AND CONFLICT OF INTEREST**

Another primary responsibility of the SPC is to ensure compliance with conflict of interest disclosure and mitigation requirements outlined in the Royal College and CFPC's National Standard for Support of Accredited CPD Activities.

### **DISCLOSING CONFLICT OF INTEREST**

All members of the SPC must annually submit a completed disclosure form to the Program/Conference Chair, where they disclose all involvement with any for-profit, not-for-profit, and public sector organizations over the past 2 years. The SPC members must avoid promoting any service or product for personal gain. They must also avoid influence or interference that could undermine their professional integrity resulting from these relations.

### **DISCLOSING CONFLICT OF INTEREST**

The SPC must also have a process in place to mitigate any conflict of interest that is disclosed. The Program Director/Conference Chair is responsible for ensuring that disclosures are collected from speakers, moderators, facilitators, SPC members, and authors; and reviewed before the start of the program or conference.

The SPC must disclose any conflicts to learners verbally at the program or conference opening. Disclosures should be made in the course syllabus or handouts, and must be included as the second slide in the speakers' presentations. If there are no handouts or slides, a summary of declared relationships should be distributed to participants.

Where a faculty member for a CPD activity requires disclosure, state:

- The full name of the individual/s
- The role of the individual/s
- The name of the organization with which the individual/s has the relationship
- The nature of the relationship between the individual/s and the organization

Where a faculty member has nothing to disclose, state:

- The full name of the individual/s
- The phrase: "has no actual or potential conflict of interest in relation to this program."

For further information and examples pertaining to conflict of interest disclosures see: <https://www.cpd.utoronto.ca/quicktips-docs/QuickTips-CFPC-COI.pdf>

Also for a slide template see: <https://www.cpd.utoronto.ca/quicktips-docs/Conflict-of-Interest-Template171218.pptx>

## **ENSURING PROGRAM IS FREE OF SPONSOR INFLUENCE**

### *Use of Funds: Unrestricted Educational Grants*

All sponsorship support funds must be provided in the form of an unrestricted educational grant. It is acceptable to designate an unrestricted educational grant to a specific program or conference; however, the funds must be undirected and support the educational programming. Use of funds to offset costs associated with accepting the grant and administering the support, such as the cost of exhibit space, is also permitted.

Under no circumstances can sponsorship support funds be used for food, hospitality, travel, lodging, entertainment or speaker fees. Neither can it be used to subsidize individual learner registration, cover private expenditure, professional expenses or for the invitation of spouses/partners.

### *Multiple Sponsor Requirement*

Events should have sponsorship from multiple sources to avoid the perception of ownership that a single sponsor may imply. It is preferential to have multiple sponsoring organizations that have competing products or services.

### *Sponsorship Support Agreement*

It is mandatory that a written agreement, signed by both the Program Director/ Conference Chair and the sponsor, be in place. The agreement must detail the terms, conditions, and purpose by which the sponsorship is provided. The agreement must be kept on file for audit purposes. A link to a [sample template agreement](#) is provided in CPD's Policy on Sponsorship, posted on the CPD website: <https://www.cpd.utoronto.ca/reports/CPD-CommercialSponsorship-Policy-2018.pdf>.

### *Collection and Disbursement of Funds*

Funds must be received, held and dispersed centrally by a University of Toronto Department, hospital, or sponsoring society. Funds cannot be held by individuals or in non-institutional bank accounts. Financial responsibility and management of programs and conferences cannot be delegated to a third party or commercial interest.

### *Financial Records and Audits*

Financial statements for each program or conference should be available for review and audit. Mechanisms should be established by the SPC to assure compliance with University and national standards. Upon request, SPCs must disclose how financial and in-kind support was used

## **CHECKLIST OF SPC RESPONSIBILITIES**

### **SPC Organization and Representation**

- determine target audience/s for program
- membership includes representatives of the target audience/s
- review/assign roles and responsibilities
- decide format and frequency of SPC meetings
- establish planning cycle timelines



### **Learning Needs and Outcomes**

- conduct learning needs assessment
- identify perceived and unperceived needs of target audience
- develop overall program learning objectives
- program learning objectives, learning needs and formats communicated to speakers
- each educational session incorporates a minimum of 25% interactivity

### **Compliance with Ethical Standards**

- the program content covers multiple points of view and is based on scientific evidence
- the program is free from sponsor influence
- Program Director/Conference Chair has reviewed and retained disclosure forms completed by SPC members, speakers, moderators, facilitators, authors, and etc.
- if conflict of interest is disclosed, mitigation process is followed and learners are informed at the program/conference start
- instruct speakers to include disclosure slide in their presentation

### **Program Evaluation**

- review evaluation results and learning outcomes
- recommend changes for next iteration of program

## RESOURCES

### ARTICLES/PRESENTATIONS

- 1 >> Kern, David E. "Overview: A Six-Step Approach to Curriculum Development" in Thomas, Kern, Hughes, and Chen, eds. *Curriculum Development for Medical Education: A Six-Step Approach*. Baltimore: John Hopkins University Press, 2016, 3rd Edition.
- 2 >> Lindsay, Elizabeth. A., "Program Planning Committees: Tools for Building Capacity", unpublished slide presentation, 4th National Accreditation Conference, September 2012, University of Ottawa.

### GUIDANCE DOCUMENTS

- 3 >> CFPC Quick Tips: Identification and Management of Conflict of Interest and Transparency to Learners (August 2017)
- 4 >> CPD (U of T) Quick Tip: Creating A Representative Scientific Planning Committee
- 5 >> CPD (U of T) Sponsorship Policy (2018)
- 6 >> Mainpro+ Accreditation: CFPC Planning Committee Job Aid
- 7 >> Mainpro+ Certification Standards
- 8 >> National Standard for Support of Accredited CPD Activities
- 9 >> Royal College CPD Activity Accreditation Standards for the Maintenance of Certification (MOC) Program Group Learning Activities (Section 1)

### TEMPLATES

- 10 >> Invitation Letter for Speakers <https://www.cpd.utoronto.ca/brochures/Speaker-Invitation-Letter-Template190701.docx>