

CPD POLICY 1.3.1

SPONSORSHIP OF ACCREDITED / CERTIFIED CPD ACTIVITIES

I. PURPOSE

In accordance with the [National Standard for Support of Accredited CPD Activities \(2017\)](#) and the [Canadian Medical Association \(CMA\) Guidelines for Physicians in Interactions with Industry \(2021\)](#), this policy outlines the expectations surrounding support received from external sources for learning activities developed, co-developed or accredited by the Continuing Professional Development (CPD) unit of the Schulich School of Medicine & Dentistry.

Sources of sponsorship can include:

- For-profit organizations, such as pharmaceutical companies, medical supply companies, and other businesses; and,
- Not-for-profit organizations, such as government, government agencies, and other professional or educational organizations.

II. STATEMENT

Sponsor organizations will not directly or indirectly influence: the development of educational objectives; selection, development, and presentation of content, including speaker selection; selection of educational methods; evaluation of the activity; and the activity participants.

i. Scientific Planning Committee

- a. Representatives of a sponsor, or any organization hired by a sponsor, cannot sit on the Scientific Planning Committee (SPC) nor direct nor participate in discussions or decisions related to any aspect of the program or conference.*
- b. The SPC must include a member who holds an academic appointment in the Schulich School of Medicine & Dentistry at Western University.*
- c. The SPC Chair must have a formal relationship with the Physician Organization.*

ii. Developing Content for Accredited / Certified CPD Activities

- a. The Scientific Planning Committee (SPC) must remain separate from sponsors to ensure there is no sponsorship influence over any aspect of the development, delivery, or evaluation of an accredited / certified learning activity.*
- b. 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.*
- c. The selection of topics, speakers, and educational materials are entirely the responsibility of the SPC.*
- d. The objectives must be developed without sponsor influence.*
- e. All speakers must be identified by the SPC and invited by the Program Director/ Conference Chair on behalf of the committee.*

- f. Unaccredited portions of any learning activity must be identified early in the planning process and remain separate from the accredited / certified learning activity agenda.

iii. Independence and Conflict of Interest Disclosure

- a. Members of the SPC, speakers, moderators, facilitators and/or authors must not receive any advice on educational content or support with materials from sponsors.
- b. Members of the SPC, speakers, moderators, facilitators and/or authors must not receive honoraria directly from sponsors or any financial support for travel or lodging.
- c. All members of the SPC, speakers, moderators, facilitators and / or authors must comply with CPD's *Policy 1.3.1 Conflict of Interest Disclosure & Management*.

iv. Receiving Financial & In-Kind Support

- a. The SPC is responsible for receiving any financial and in-kind support for the development of the accredited / certified learning activity.
- b. All sponsorship support with financial funds must be provided in the form of an unrestricted educational grant.
- c. Multiple sponsors must be acquired to support an accredited / certified learning activity. CPD will not normally accredit an educational activity with single-source sponsor support. This requirement may be waived at the discretion of the Associate Dean, CPD.
- d. A written agreement signed by the SPC or the CPD provider organization and the sponsor must be provided to document the terms, conditions, and purposes by which sponsorship is provided.
- e. Upon request, the SPC must disclose how the financial and in-kind support was used for the accredited / certified learning activity.

v. Direction of Funds from Financial Sources

- a. The SPC must approve and retain overall accountability for payments of travel, lodging, legitimate out-of-pocket expenses, and honoraria offered to members of the SPC, speakers, moderators, facilitators and/or authors.
 - i. This applies when payments are assumed by, or delegated to, a third party (which can never be a commercial interest).

vi. Registration Fees and Payments

- a. Accredited / certified learning activities supported by commercial sources are encouraged by CPD Office to charge a reasonable registration fee to participants.
- b. Fees may be waived for residents, fellows, and undergraduate students.
- c. Attendee lists and/or contact information is prohibited from being shared with sponsoring organizations.
- d. Although catering costs can be part of the overall program budget, sponsorship must not be recognized (tagged) to the provision of food or beverages to participants.
- e. Sponsors must not directly or indirectly be involved in planning, supporting, or subsidizing social events associated with the educational program.
- f. Payments or subsidies for travel, lodging, or other out-of-pocket expenses cannot be provided to participants of the accredited / certified learning activity. Exceptions include:
 - i. participants who are also members of the SPC, speakers, moderators, facilitators and/or authors of the activity; and
 - ii. participants claiming and receiving compensation from residency programs, employers or provincial CPD support funds, even when activities they attend have received support from these sources.

- g. Spouses, partners, or other family members of the SPC, speakers, moderators, facilitators, authors, and participants cannot be paid or subsidized a sponsor, or any organization hired by a sponsor, to cover the costs of travel, lodging or other out-of-pocket expenses.

vii. Unaccredited Activities

- a. Unaccredited CPD activities (including unaccredited satellite symposia) cannot be listed on the agenda or other promotional material of the accredited / certified learning activity.

viii. Recognizing Financial & In-Kind Support

- a. All financial and in-kind support received from sponsors must be disclosed to participants of the accredited / certified learning activity as part of a sponsorship acknowledgement page.
 - i. The sponsorship acknowledgement page must be separate from the educational content.
 - ii. The standard acknowledgement must state: "This program has received an educational grant or in-kind support from (names of funding organizations)."ⁱ
- b. A sponsor's name, logo or branding cannot be linked to a specific educational session or section of an accredited / certified learning activity beyond the standard acknowledgement statement provided in Section (vii) (a) (ii).
- c. The SPC must ensure that their interactions with sponsors meet standards and laws regarding the protection of privacy and copyright.

ix. Managing Sponsorship Promotion

- a. Product-specific advertising, branding, logos, or promotional materials cannot be included on, appear within, or be adjacent to:
 - i. slides, abstracts, handouts, and any educational materials used as part of an accredited learning activity.
 - ii. activity agendas, programs, or calendars of events (preliminary and final).
 - iii. webpages or electronic media containing educational material.
- b. Product-specific advertising, branding, logos, or promotional materials cannot be included on/appear within locations where accredited / certified learning activity sessions are occurring (e.g., lecture halls, small group discussion rooms) immediately before, during or immediately after an accredited CPD activity.
- c. Advertisements and sponsor exhibits must have a clear separation in location from the accredited / certified learning activity.
- d. Any recommendation for patient management must use generic molecular names rather than trademark pharmaceuticals, where possible. If that is not possible, then both generic and trade names will be used. The discussion of therapeutic options must not reflect exclusivity and branding.
- e. Any incentive provided to participants associated with an accredited / certified learning activity must be approved by CPD.

iii. DEFINITIONS

Learning Activity: Also referred to as an "Activity." An educational offering that is part of the CPD provider organization's overall programming or one for which the CPD provider organization grants credit(s).ⁱⁱ

Financial Support: Monetary contributions provided by sponsor for the development, delivery, or evaluation of an accredited / certified CPD activity, learning resource, or tool.ⁱⁱⁱ

In-Kind Support: Services or tools or human resources which have a monetary value and are provided to an organization in support of an educational activity.³

Sponsorship: The process by which an individual, group, corporation or organization provides financial and in-kind support for the development, delivery or evaluation of an accredited CPD activity, learning resource or tool.

CPD Provider Organization: An organization that assumes the responsibility and accountability for the development, delivery and evaluation of accredited CPD activities. CPD provider organizations ordinarily meet the definition of a physician organization.

Scientific Planning Committee (SPC): A group of target audience representatives responsible for the identification of the educational needs of the intended target audience; development of educational objectives; selection of educational methods; selection of scientific planning committee members, speakers, moderators, facilitators and/or authors; development and delivery of content; and evaluation of outcomes of an accredited CPD activity.^{iv}

iv. ADDITIONAL RESOURCES

[Sponsorship Agreement Template](#)

[Speaker Letter Template](#)

CPD Policy on Scientific Balance of Content

[CPD Policy on Conflict of Interest Disclosure and Management for Accredited / Certified CPD Activities](#)

ⁱ National Standard for Support of Accredited CPD Activities, 2017, V. 23.1, Glossary of Terms, page 10.

ⁱⁱ Canadian Accreditation Standards for Continuing Professional Development (CPD) Provider Organizations, 2023, Glossary of Terms, page 4.

ⁱⁱⁱ National Standard for Support of Accredited CPD Activities, 2017, V. 23.1, Glossary of Terms, page 9.

^{iv} National Standard for Support of Accredited CPD Activities, 2017, V. 23.1, Glossary of Terms, page 8.