

CPD POLICY:

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), and the [Policy and Guidelines for Interactions between Schulich School of Medicine and Dentistry and Pharmaceutical, Biotech, Medical Device, Medical/Dental Supply, and Research Equipment Supplies Industry](#) (2011), this policy outlines the expectations surrounding support received from external sources for accredited 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.
- 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: development of educational objectives; selection, development, and presentation of content, including speaker selection; selection of educational methods; evaluation of the activity; activity participants.

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

ii. Independence and Conflict of Interest Disclosure

All members of the SPC, speakers, moderators, facilitators and / or authors must:

- a. not receive any advice on educational content or support with materials from sponsors.
- b. not receive honoraria directly from sponsors or any financial support for travel or lodging.
- c. comply with CPD's *Policy 1.3.1 Conflict of Interest Disclosure & Management*.

iii. 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. Where possible, multiple sponsors should be acquired to support an accredited/certified learning activity. CPD discourages developing an educational activity with single-source sponsor support.
- c. A written agreement signed by the SPC and the sponsor must be provided to document the terms, conditions, and purposes by which sponsorship is provided.
- d. Upon request, the SPC must disclose how the financial and in-kind support was used for the accredited/certified learning activity.

iv. *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).

v. *Registration Fees and Payments*

- a. Accredited/certified learning activities supported by commercial sources are encouraged by CPD Office to charge a registration fee to participants.
- b. 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.
- c. Spouses, partners or other family members of the SPC, speakers, moderators, facilitators, authors and participants cannot be paid or subsidized by a sponsor, or any organization hired by a sponsor, to cover the costs of travel, lodging, or other out-of-pocket expenses.

vi. *Social and Unaccredited Activities*

- a. Social activities associated with accredited/certified learning activities cannot occur at a time or location that interferes, competes with, or takes precedence over, accredited learning activities.
- b. Unaccredited CPD activities (including unaccredited satellite symposia) cannot be listed on the agenda or other promotional material of the accredited/certified learning activity.

vii. *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)."¹
- b. A sponsor's name, logo or branding cannot be linked to a specific educational

¹ National Standard for Support of Accredited CPD Activities, 2017, V. 23.1, Glossary of Terms, page 10.

- 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.

viii. *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 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

Accredited/Certified Learning Activity: Also referred to as an “Accredited CPD Activity”. An educational event that meets the administrative, educational, and ethical standards of the Royal College of Physicians and Surgeons of Canada or College of Family Physicians of Canada. Accredited learning activities include group learning, self-learning, and assessment, in a live or web-based format.²

Facilitator: One that facilitates; especially: one that helps to bring about an outcome (as learning, productivity, or communication) by providing indirect or unobtrusive assistance, guidance, or supervision.²

Financial Support: Monetary contributions provided by sponsor for the development, delivery, or evaluation of an accredited / certified CPD activity, learning resource, or tool.³

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

Moderator: One who presides over an assembly, meeting, or discussion.²

Scientific Planning Committee (SPC): A group of target audience representatives responsible for:

² Canadian Accreditation Standards for Continuing Professional Development (CPD) Provider Organizations, 2018, Glossary of Terms, page 20.

³ National Standard for Support of Accredited CPD Activities, 2017, V. 23.1, Glossary of Terms, page 9.

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; and the development and delivery of content, and evaluation of outcomes of an accredited CPD activity.⁴

Speaker: Individuals selected by a scientific planning committee based on their recognized expertise and skills to prepare and present information or evidence at a planned educational session in an accredited learning activity.²

iv. ADDITIONAL RESOURCES

[Sponsorship Agreement Template](#)

[Speaker Communication Template](#)

[CPD Policy on Scientific Balance of Content](#)

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

⁴ National Standard for Support of Accredited CPD Activities, 2017, V. 23.1, Glossary of Terms, page 8.