

COS GUIDE: How to Develop a Section 1 Accredited Group Learning Program/Activity

Group learning is an important development activity for physicians and provides an opportunity to confirm or expand areas of knowledge or practice management, to identify potential new therapies or approaches for practice, and to share practice issues or experiences with peers.

The Canadian Ophthalmological Society (COS) has developed the following guide to assist in creating Section 1 Accredited Group Learning program/activity. This guide will lead you through the entire planning process and simplify the completion of the final accreditation application. We hope this guide assists you in developing high-quality Section 1 accredited group learning programs/activities that meets all the required ethical and educational standards.

As per the Royal College, Group Learning Activities approved under Section 1 must be developed or co-developed by a physician organization.

A physician organization is a not-for-profit group of health professionals with a formal governance structure, accountable to and serving, among others, its physician members through

- *continuing professional development,*
- *provision of health care, and/or*
- *research.*

The physician organization is accountable to and serves, among others, its physician members through a governance structure that enables the membership to vote on strategic directions and initiatives of the whole organization.

STEP 1: ASSEMBLE A SCIENTIFIC PLANNING COMMITTEE (SPC)

- Include members who represent the target audience
- Ensure some SPC members belong to the physician organization responsible for the CPD activity

Accreditation Application

- ✓ Include names of SPC Chair and all SPC members
- ✓ Answer
 - How does each SPC member individual represent target audience?
 - Is the individual a member of the physician organization responsible for planning the CPD?

STEP 2: CONDUCT A NEEDS ASSESSMENT

- Use strategies like surveys, literature reviews, healthcare data to identify the learning needs of the target audience
- Summarize the needs assessment results to inform program development

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- ✓ Include Needs Assessment summary
- ✓ Answer
 - What needs assessment strategies were used to identify the learning needs (perceived and/or unperceived) of the target audience? Examples might include: surveys of potential participants, literature reviews, healthcare data, and assessment of knowledge, competence or performance of potential participants.
 - What learning needs and/or gap(s) in knowledge, attitudes, skills or performance of the intended target audience did the scientific planning committee identify for this activity?

STEP 3: DEVELOP EVALUATION STRATEGY AND LEARNING OBJECTIVES

- Determine who is the intended target audience of the program/activity
- Use the needs assessment results to develop overall and session-specific learning objectives
- Share the needs assessment and learning objectives with speakers/faculty
- Determine what [CanMEDS roles](#) are relevant to the program/activity
- What sources of information are selected by the planning committee to develop the content of this program/activity (e.g. scientific literature, clinical practice guidelines, etc.)

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- ✓ Identify the target audience
- ✓ Include Learning Objectives for the overall program and if necessary, the session-specific learning objectives (Note: To apply for accreditation, you must submit at least 75% of your program's learning objectives.)
- ✓ Identify CanMEDS roles
- ✓ Identify what sources of information to develop content
- ✓ Answer
 - How were the identified needs of the target audience used to develop the overall and session-specific learning objectives?

STEP 4: CHOOSE LEARNING METHODS

- Select learning methods to help meet the learning objectives
- Ensure a minimum of 25% of the activity involves interactive learning
- Program/Activity evaluation. Consider measuring changes in knowledge, skills, attitudes, or improved healthcare outcomes
- Consider including methods to provide learner feedback

Accreditation Application

- ✓ Include a copy of the activities evaluation form(s)
- ✓ Answer
 - What learning methods were selected to help the CPD activity meet the stated learning objectives?
 - What learning methods were selected to incorporate a minimum of 25% interactive learning?
 - How will the overall program and individual sessions will be evaluated by participants

STEP 5: MANAGE CONFLICTS OF INTEREST

- Collect and disclose to learners the conflicts of interest of SPC members, speakers, moderators, facilitators, authors
- If conflicts are identified, have the SPC determine methods to manage potential bias

Accreditation Application

- ✓ Include a copy of the Disclosure Form
- ✓ Answer
 - How are the scientific planning committee members' conflicts of interest declarations collected and disclosed to (a) The physician organization, (B) To the learners attending the CPD activity?
 - If a conflict of interest is identified, what are the scientific planning committee's methods to manage potential of real conflicts of interests

STEP 6: DEVELOP ACTIVITY BUDGET

- Seek and document sources of revenue, including sponsorships (educational grants, in-kind support, etc.), exhibits and registration fees
- Develop a budget detailing the receipt and expenditure of all revenue sources
- What is the expected number of registrants?

Accreditation Application

- ✓ Include a copy of the Program/Activity budget
- ✓ Identify how payments are made
- ✓ Answer
 - How are payments of travel, lodging, out-of-pocket expenses, and honoraria made to members of the scientific planning committee, speakers, moderators, facilitators and/or authors?

STEP 7: MANAGE SPONSORSHIP AND EXHIBITS

All activities accredited after January 1, 2018, must comply with the [National Standard for support of Accredited CPD Activities](#). The National Standard applies to all situations where financial and in-kind support is accepted to contribute to the development, delivery and/or evaluation of accredited CPD activities.

- Separate commercial exhibits and ads from educational content
- Document sponsorship terms in a written agreement signed by the physician org and sponsor
- Do not schedule unaccredited CPD activities at times and locations as accredited activities

Accreditation Application

- ✓ Include Sponsorship and Exhibition Details (example: prospectus developed to solicit sponsors/exhibitors)
- ✓ Include Sponsorship Agreements
- ✓ Answer:
 - How has the physician organization ensured that their interactions with sponsors have met professional and legal standards including the protection of privacy, confidentiality, copyright and contractual law regulations?
 - How has the physician organization ensured that product specific advertising, promotional materials or other branding strategies have not been included on, appear within, or be adjacent to any educational materials, activity agendas, programs or calendars of events, and/or any webpages or electronic media containing educational material?
 - What arrangements were used to separate commercial exhibits or advertisements in a location that is clearly and completely separated from the accredited CPD activity?
 - If incentives were provided to participants associated with an accredited CPD activity, how were these incentives reviewed and approved by the physician organization?
 - What strategies were used by the scientific planning committee or the physician organization to prevent the scheduling of unaccredited CPD activities occurring at time and locations where accredited activities were scheduled?

STEP 8: DEVELOP PROMOTIONAL AND EDUCATIONAL MATERIALS

- Develop a program/agenda that lists topics, speakers, start/end times, and learning objectives

Accreditation Application

- ✓ Include a copy of the Program/Agenda
- ✓ Include promotional materials used to promote the program/activity
- ✓ Answer
 - If the scientific planning committee identifies that the content of the CPD activity does not comply with the ethical standards, what process would be followed? How would the issue be managed?
 - Describe the process by which the SPC maintained control over the CPD program elements including: the identification of the educational needs of the intended target audience; development of learning objectives; selection of educational methods; selection of speakers, moderators, facilitators and authors; development and delivery of content; and evaluation of outcomes

- Describe the process used to develop content for this activity that is scientifically valid, objective, and balanced across relevant therapeutic options.
- How were those responsible for developing or delivering content informed that any description of therapeutic options must utilize generic names (or both generic and trade names) and not reflect exclusivity and branding?

STEP 9: KEEP ADMINISTRATIVE RECORDS

- Maintain attendance records for 5 years
- Provide participants with a certificate of attendance listing the activity details

Accreditation Application

- ✓ Include a copy of the certificate of attendance

STEP 10: SUBMIT APPLICATION FOR SECTION 1 APPROVAL

- Complete and submit the Section 1 Application form and attach all required documentation
- Have the SPC Chair attest that CMA and National Standard guidelines were followed

Reminder: Submit the application well in advance of the program date to allow ample time for review and approval

RESOURCES

[COS Accreditation Toolkit](#)

[Royal College CPD Activity Toolkit](#)