



Guidelines for Commercial Support of Continuing Medical Education/Continuing Professional Development Activities (Updated October, 2006*)

The University of British Columbia, Faculty of Medicine
Division of Continuing Professional Development and Knowledge Translation

The following document outlines the guiding principles pertaining to the support of UBC Division of Continuing Professional Development and Knowledge Translation (“UBC CPD-KT”) activities as well as programs that are submitted to it for approval of study credits including but not restricted to courses, conferences, workshops, continuing education of approved rounds, internet courses, and the production of learning resources, e.g. CD ROM or videotape by commercial sponsors (e.g. pharmaceutical companies, instrument, and device manufacturers).

These guidelines comply with the recommendations in the following documents:

1. Canadian Medical Association policy on “Physicians and the Pharmaceutical Industry” (Update 2001)
2. The College of Family Physicians of Canada Mainpro-M1 and Mainpro-C accreditation criteria
3. Royal College of Physicians and Surgeons of Canada “Guidelines for Support of Continuing Medical Education by Industry” (September, 1985)
4. American Medical Association Ethical Opinion on “Gifts to Physicians from Industry” (December, 1998)
5. Accreditation Council for Continuing Medical Education for “Standards for Commercial Support” (September, 2004)
6. U.B.C. Policies and Procedures (July, 2006)
www.universitycounsel.ubc.ca/policies/policies.html

These guidelines also comply with the Standing Committee on Continuing Medical Education resolution on honorarium payment (May 1, 2005).

Preamble

The primary objective of professional interactions between physicians and commercial supporters should be for the advancement of the health of the population rather than the private good of either physicians or industry. The primary purpose of Continuing Medical Education/Continuing Professional Development (“CME/CPD”) activities is to address the educational needs of physicians and other health care providers in order to improve the health care of patients. It is the responsibility of the UBC CPD-KT to ensure that any educational activity is designed primarily for that purpose.

*Please review guidelines 2(b), 7 and 8 for changes to the previous document. Guidelines 10 and 11 are new.

University CME/CPD providers often receive financial and other support from commercial sponsors. Such support can contribute significantly to the quality of CME/CPD activities but must avoid potential bias or the perception of it. The purpose of this document is to describe the guiding principles that the UBC CPD-KT will meet in planning, designing, implementing, and evaluating CME/CPD activities for which commercial support was received.

1. The selection of educational topics, speakers, and course materials must be based upon the clinical needs of the patient population and educational needs of physicians, and must not be influenced by commercial sponsors.

To ensure clinical scientific integrity, the selection of topics, speakers, course materials, and content and use of enduring materials is entirely the responsibility of the designated course coordinator or organizer. If a commercial sponsor recommends a resource person or speaker, he or she must be acceptable to the course coordinator and his/her planning committee. The invitation to participate must emanate from the course coordinator and not from the commercial sponsor. All members of planning committees must abide by the principles set out in this document and participate without introducing commercial bias.

2. All UBC CPD-KT activities must be free of any real or perceived commercial bias.

When the UBC CPD-KT is the primary sponsor or organizer of a CME/CPD activity, the following principles will apply:

a) Assistance with preparation of educational materials

The content of slides and reference materials must remain the ultimate responsibility of the faculty member selected to provide the CME/CPD activity. A commercial sponsor may be asked to help with the preparation of conference-related educational materials, but these materials must not, by either content or format, advance the specific proprietary interests of the commercial sponsor. The distribution of promotional materials with the course registration package or during educational sessions will not be permitted unless they are judged unbiased by the UBC CPD-KT or the course coordinator and his/her planning committee and clearly include only those things related to instruction.

b) Assistance with educational planning

The acceptance by the course coordinator and his/her planning committee of advice or services from the commercial sponsor concerning speakers, invitees, or other educational matters including content, educational objectives, selection of educational methods, and evaluation of the activity must not be among the conditions of providing support by a commercial sponsor. The final decision on the involvement of any participant must be made independently of the commercial sponsor by the course coordinator and his/her planning committee.

c) Repeated CME/CPD activities

Commercially supported UBC CPD-KT activities must meet with the standards set out in this document each time the activity is offered.

3. All CME/CPD activities must be free of commercial bias towards a particular product or therapy.

Topics may not be product or promotion-oriented, and presentations must give a balanced view of all relevant therapeutic options available. For example, generic names should be used where possible. When trade names are employed, it is preferable to use the trade names of several companies rather than that of a single commercial sponsor. Any unapproved therapy mentioned in a CME/CPD activity should be explicitly identified as such in the presentation.

4. A registration fee must be charged for all CME/CPD activities that would normally have a registration fee associated with them.

A commercial sponsor must not cover the entire cost of a CME/CPD activity. Commercial support may help reduce the cost of registration, but a registration fee should be paid by the participants in order to avoid a perceived or real influence on learning. Payments to defray the costs of an activity should not be accepted directly from any company by physicians attending the activity. Exceptions to this general principle might include rounds, established professional meetings, faculty development activities and research-oriented continuing education activities since these activities would normally be carried out without charge to participants. Any exceptions to these principles are at the sole discretion of the Assistant or Associate Dean, UBC CPD-KT or designate.

5. Faculty and visiting speaker payments must be consistent with that which would be made in the absence of commercial sponsorship.

Any payment to faculty members or visiting speakers may not be made directly by commercial sponsors. All funds from commercial sponsors must be in the form of unrestricted educational grants made payable to the UBC CPD-KT. Specifically, a University of British Columbia faculty member may not be directly sponsored by or receive gifts from commercial organizations while taking part in a CME/CPD activity sponsored by the UBC CPD-KT. It is appropriate for faculty members at conferences or meetings to accept reasonable honoraria and/or reimbursement for reasonable travel, lodging, and meal expenses. It is also appropriate for consultants who provide genuine services to receive reasonable compensation and accept reimbursement for reasonable travel, lodging, and meal expenses. Token consulting or advisory arrangements cannot be used to justify the compensation of physicians for their time or travel, lodging, and other out-of-pocket expenses.

6. Registrants must not receive payment from commercial sponsors for attendance at CME/CPD activities.

Commercial sponsors should not pay for travel or lodging costs or other personal expenses of physicians, their spouses, or family members attending a UBC CPD-KT activity. Subsidies for hospitality should not be accepted outside of modest meals that are provided as part of an activity. Scholarships or Special Funds may be accepted to permit Medical Students, Residents, or Fellows in accredited programs to attend CME/CPD activities as long as these funds are approved by their program chair, director, or designate.

7. The extent and nature of commercial support at a CME/CPD activity must be in keeping with the educational intent of the activity.

Since all funds from commercial interests must be in the form of unrestricted educational grants, subsidies specifically designated for hospitality should not be accepted. Social events at a CME/CPD activity must not compete with nor take precedence over educational events. The approved educational activity must clearly have greater importance and time duration than any associated social activities. In general, travel and accommodation arrangements, social events, and venues for industry sponsored CME/CPD activities should be in keeping with arrangements that would normally be made without commercial sponsorship.

8. All parties must fully disclose all monetary support, expenditures, and avoid potential conflicts of interest relevant to that CME/CPD activity.

This principle applies to the UBC CPD-KT as well as all faculty members and visiting speakers participating at any UBC CPD-KT sponsored, co-sponsored, or accredited CME/CPD activity. The CME/CPD course coordinators or their designates are responsible for conveying to the participants any potential conflicts declared by the speakers or planning committee members and any funding received in support of them. Speakers and planning committee members must fully disclose and if feasible, resolve any competing interests with respect to information being presented at a CME/CPD event. In particular, for the 2-year period prior to a CME/CPD activity, all presenters and course planners must disclose with respect to any company whose interests are in the area(s) covered by the educational material:

- a) any direct financial interest in the company;
- b) ownership interest in the company (i.e. stocks, stock options, or other ownership interest, excluding diversified mutual funds);
- c) membership on the company's advisory board or similar committee(s);
- d) involvement in research sponsored by the company;
- e) participation in clinical studies sponsored by the company or using products produced by the company;
- f) involvement in the design of clinical studies concerning the use of products manufactured by the company;
- g) honorarium, consulting fees, salary, royalty, grant-in-aid ("restricted" or "unrestricted"), or other monetary support received from or expected from the company; and
- h) ownership of a patent for a product referred to in the presentation or marketed by the company.

Any other financial ties that may have a direct or indirect connection to the content of a CME/CPD presentation should also be disclosed.

Commercial sponsor representatives participating on any planning committees must be so identified on course brochures and other relevant materials. Following any UBC CPD-KT activity, upon request, information should be provided to each commercial sponsor and any other relevant party concerning the specific expenditure of the funds it has provided. Each commercial sponsor should be prepared to report information concerning their expenditures in support of the activity to the CME/CPD organizers.

9. The presence of commercial displays must not influence CME/CPD activities.

When commercial exhibits are part of the program, they should not influence the planning nor interfere with the presentation of CME/CPD activities. Exhibits (including banners, which name products) may not be placed in the same room as the educational event, and commercial sponsors may not influence exhibit placement as a condition of support for a CME/CPD activity. The commercial sponsor may be thanked publicly, and its representatives may attend the educational activity, but in a capacity defined by the course coordinator or organizer. Representatives of commercial interests must not engage in sales or promotional activities during the CME/CPD activity. A single commercial organization may sponsor a course and provide a relevant exhibit of its products as long as it abides by the foregoing principles.

10. Satellite symposium influenced by commercial interests must be clearly separated from any approved CME/CPD activity.

“Satellite” symposia are separate meetings often associated with conferences and other CME/CPD activities. These symposia are frequently produced by commercial interests and are not in compliance with these commercial support guidelines. Registrants may perceive such “satellite” programs as integral to the approved event and be unaware of commercial bias. Thus, conference organizers must take care to ensure that:

- a) registrants at the approved program are aware that such satellite symposia are not approved by UBC CPD-KT;
- b) such activities are promoted (marketed or “branded”) in a way which clearly identifies the satellite activity as distinct from the approved event; and
- c) the satellite symposia are separated temporally and if possible, spatially from the approved event.

11. The evaluation of a CME/CPD activity must allow participants to indicate if any commercial bias was perceived.

Following any CME/CPD activity, an evaluation form to assess speakers and the overall program must include a question concerning the possibility of commercial bias such as; “Did you perceive commercial bias in any aspect of the program?”. For programs that are not directly sponsored or co-sponsored by UBC CPD-KT, a summary of the responses to this question must be forwarded to UBC CPD-KT following the event within 3 months. As well, UBC CPD-KT will have the right to audit any approved CME/CPD activity to ensure compliance with the guidelines in this document.

12. Acknowledgements must avoid bias towards particular sponsors or products.

Acknowledgements should simply mention the name(s) of the commercial sponsor(s). The acknowledgement must not mention or suggest any endorsement of the commercial sponsor or its product(s). Advertising commercial products by name or indication is not permitted. Commercial sponsors may not be listed in the schedule of activities or close to the list of faculty members. In addition, the following guidelines apply:

- a) Course brochures: Unrestricted educational grants and commercial sponsors may be acknowledged in course brochures under “Acknowledgements”. Commercial sponsors must not be listed on the front of brochures.
- b) Posters, flyers, and one-page brochures: Commercial sponsors may be acknowledged at the bottom of the document in an unobtrusive manner.
- c) Websites and other electronic formats: in a one-page or one-screen format, commercial sponsors may be acknowledged at the bottom of the page or screen in an unobtrusive manner. In a multi-page or multi-screen format, commercial sponsors must not be acknowledged on the main (home) page. Links to commercial sponsors may not be established.
- d) In printed CME/CPD handouts or syllabi, advertisements, and promotional materials may not be interleaved within the pages of the CME/CPD content. They may be inserted at the end of the syllabus, not facing any content, and clearly marked as advertising/promotion.

This document will be the official guiding principles of the UBC CPD-KT with regard to commercial support for CME/CPD activities and reviewed every 3 years.

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