Responsibilities of a CME/CE/CPD Activity Director

The **Course Director** generates the educational content for an activity which has intrinsic academic validity, and falls within the spectrum of medicine, nursing, or other clinical practice conducted by professional healthcare providers. S/he has prime responsibility for designing a curriculum which fosters improving knowledge, skills and/or attitudes that support practice-based learning and improvement. Specific responsibilities include:

1. **Aligning the activity** with the Continuing Professional Education Committee’s Mission Statement. See the attached WUH CPEC Mission Statement.
2. **Documenting a needs assessment** with underlying professional practice gaps of the learners, and citing evidence for the gaps.
3. **Establishing overall course objectives**, and where applicable, subsidiary learning objectives, to meet the identified needs.
4. Validating clinical content, to ensure that it is balanced, objective, scientifically rigorous, evidence-based and independent of commercialism:
   A. All recommendations involving clinical medicine or clinical practice in the CME/CE/CPD activity are **based on evidence** that is accepted within the profession of medicine as adequate justification for their indications and contraindications in the care of patients; and
   B. All scientific research referred to, reported or used in the CME/CE/CPD activity in support or justification of a patient care recommendation conforms to the **generally accepted standards** of experimental design, data collection and analysis.
   C. At no time will the CME/CE/CPD activity promote recommendations or treatments which are known to have risks or dangers that outweigh the benefits, or are known to be ineffective in the treatment of patients with the clinical problem being addressed. **Incorporating critical review of evolving topics** into the curriculum is strongly encouraged.
   D. All presentations are HIPAA compliant and respectful of patients and their families.
5. **Prioritizing learning**, so that social events do not compete with or take precedence over the educational activity.
6. **Designing educational interventions**, methods and formats that:
   A. Are intended to change competence, performance or patient outcomes
   B. Match the learners’ current or potential scope of professional activities
7. **Appointing the Activity Planning Committee** (all personnel with any control over content) and identifying them to the WUH CME Office, including:
   - Course Directors(s), Planners, Presenters, Moderators, Authors
8. Managing individual speakers and moderators. To do this, Course Director will:
   A. Initiate contact with speakers, planners, moderators prior to follow-up
      confirmation by the CME Office
   B. Maintain control over instructional content, selection of speakers, topics
   C. Oversee/negotiate honoraria amounts paid to guest faculty, based on WUH
      CME honorarium policy.
   D. Facilitate the Disclosures process as initiated by the WUH CME Office
      ▪ No later than one month in advance of the course start date;
      ▪ Conflicts of interest resolved and documentation in the CME Office no
        later than 2 weeks prior to the course start date;
      ▪ Disclosures and review forms submitted electronically or paper copy
   E. Implement WUH mechanism for resolving potential conflicts of interest
      for those reporting relevant relationships
      ▪ ‘Faculty Disclosure Review Form’ for Speakers
        • Content Review Form, when content review is selected as the
          mechanism to resolve the conflict
      ▪ CME Conflict of Interest (COI) and Resolution and Content Validity
        Resolving Conflicts of Interest for Planning Committee Members’ -
        review form for Planners

9. Nominating suggested fundraising sources for solicitation by the CME Office,
   including commercial support grants and commercial exhibitors.

10. Allowing the WUH CME Office solely to manage all fundraising activities,
    commercial support, exhibit vendors, and advertising sales in compliance with WHU
    CME policies, Sunshine Act, and/or Accreditation Council for Continuing Medical
    Education (ACCME) Standards of Commercial Support
    A. Assuring that commercial support will be communicated to learners in written
       format.
    B. All commercial support is given with WUH CME knowledge and approval

11. Maintaining the separation of promotion and education
    A. Ensure that appropriate arrangements are in place for exhibitors and that exhibitor
       activities are kept separate from education and the educational space

12. Keeping within budgetary constraints for guest faculty honoraria and expenses
    such as travel, lodging, and meals

My signature below indicates that I have read, understand, and accept the duties of CME
Activity Director, as described above:

Name:_______________________________________________

Signature:_____________________________________________

Date of Term: From ______________20_______ to_________________20_______
Recommended Milestones of CME/CE/CPD Course Planning

The purpose of this section is to delineate the schedule of deliverables and their dates due to the WUH CME office. Prior to the Course Date or online start date, these deliverables must be submitted at various milestones:

- **Complete Curriculum Planner** (including a Needs Assessment citing evidence basis, learning/practice gap analysis, measureable learning objectives and an outcomes measurement strategy) must be received by the CME Office prior to any course announcement or promotion. – due 26 weeks prior to the activity date

- **First-time courses may NOT book any conference center space** or consider the activity date to be confirmed until the initial Curriculum Planner for that activity has been approved by the CME Director

- Any and all Save-the-Date materials, brochure, and web site must receive CME Director approval prior to printing or going live on web, or any other written promotion of the activity, but at least 8 weeks prior to the activity date

- **Completed Disclosure documents** for all planners and faculty – due 30 calendar days prior to course start date

- **Resolution of Conflict of Interest documents** completed for all planners and faculty – due 14 calendar days prior to course start date

- **Letters of Agreement for Commercial Support** (Grants) – due 7 calendar days prior to course start date

- **Draft syllabus/course materials for approval** prior to printing – due 7 calendar days prior to course start date

- **Honorarium Guest Lecturer/Performer Agreement** (if applicable) – due 7 calendar days prior to start date

- **Speaker Authorization to audio or video record** speaker presentation – due 7 calendar days prior to the start of the activity

After Course completion:

- CME Planner will prepare financial/attendance statement, and exit survey results for the Course Director, within 30 days after course completion

- Course Director will review exit survey data and/or follow-up survey data from learners, and use it to issue a Needs Assessment Progress due 45 days after course completion

- Post Meeting –CME Director and CME Planner will meet with Course Director within 60 days after course completion to discuss End of Course Review and how to build upon lessons learned in preparation for future courses.

Adapted 7/30/2015 from University of Utah CME department’s “Responsibilities of CME Course Directors(2009)”
Winthrop University Hospital

CME Mission

The Continuing Medical Education mission at Winthrop-University Hospital (WUH) is to:

- Promote life-long learning and all desirable physician attributes expressed in the ACGME core competencies, now universally adopted across the medical education continuum.
- Improve the knowledge, competence and performance of physicians in all represented specialties of medicine and surgery.
- Identify the professional practice gaps of the medical staff that might be addressed through the CME process.
- Design and implement CME activities that present valid content which is unbiased, evidence-based, and free of commercial interest.
- Enhance clinician performance to achieve institutional patient safety and performance improvement goals, as well as individual goals of maintenance of certification and re-licensure.
- Evaluate changes in physician competence and performance as a result of the CME process, using both quantitative and qualitative measures.

By doing so, the CME program mission serves to support the overall mission of Winthrop University Hospital and its staff, that is, to enhance the quality of life for all our patients by providing the highest quality patient care and to advance the overall practice of medicine in our community.

Purpose. The Office of Continuing Medical Education and the CME Committee of the medical staff oversee the educational planning, funding, implementation and evaluation CME activities at Winthrop. As a CME program our goal is to improve physician competence and performance by providing an array of activities in a variety of formats that support the quality priorities of the institution as well as provide specialty updates on the most current trends in evaluation and treatment of disease.

Content areas. We offer 1520 live courses and over 30 ongoing regularly scheduled series each year. Approximately 81% of our physician education (instruction hours) occurs in RSS sessions annually. The balance of 19% occurs in live courses. Each year, over 400 instructional hours have occurred online, via our first, accredited Internet-based performance improvement learning module on VTE Prevention and Management. Content areas for our annual live specialty courses include specialty updates and current research findings in the following practice areas:

- OB GYN survey topics
- orthopaedics for primary care medicine
- trauma care (surgical, medical, special populations)
- issues in neonatology
- stroke and neuro-critical care
- prostate cancer
- adult and pediatric endocrine disorders (eg. Turner syndrome, growth hormone therapy, diabetes care for Type 1 and Type 2 and metabolic consequences)
- acute and chronic heart failure
Responsible of a CME/CE Activity Director  

- advanced GI endoscopy procedures
- breast cancer care (invasive and non-invasive therapies)
- neurosurgical update

Our regularly scheduled series include specialty specific academic conferences with a variety of formats including: grand rounds, tumor boards, M & M conferences, case conferences, and journal clubs. Content for our RSS sessions is now shifting toward quality improvement topics within the specialty, using sequential sessions as opposed to “one-off” lectures. **Target audience.** The target audience for all our accredited activities is highly inter-professional including physicians, PAs, NPs, nurses, therapists, residents, and students. **Types of activities.** In addition to our RSS and live courses, we have recently produced two accredited Internet online learning modules. One is on *VTE Prevention and Management* and another is on *Pain Management for Acute and Chronic Conditions*. In addition, we recently completed our first journal supplement from the proceedings of our Turner Syndrome Symposium in September, 2010. Although unaccredited, the supplement will be distributed internationally in the Journal for Pediatric Endocrinology Reviews.

**Expected results.** Our learner evaluations inform us that planned practice changes are indeed the result of our activities. We are confident that with additional evaluation methods, a restructuring of the RSS curriculum and other educational redesign efforts currently underway that we will be better able to demonstrate the effectiveness of our accredited activities in the future.

Our educational initiatives will improve practice by changing physician competence, performance, or improved patient care, as reflected in:
- translation of research and application of advances in medical science, best practices and evidence-based recommendations for the restoration, maintenance, and promotion of physical and mental health;
- desirable physician competencies; and
- the quality, safety and cost of medical care.