

PROGRAM OVERVIEW AND LEARNING OBJECTIVES

Preamble:

The overall goal of the Healthcare Education Scholars Program is to foster a sense of academic scholarship in healthcare education. The intent is to provide some theoretical scaffolding to those activities that our clinician educators take part in on a daily basis in order to produce more effective healthcare providers. We aim to inspire innovation and scholarship among the participants, as well as develop a local community who benefit from mutual support, and ultimately provide leadership for the next generation of clinician educators.

Process:

The approach is to introduce the participating clinician educators to a broad overview of the field of healthcare education. Each weekly session will consist of 3.5 hours of planned activity, beginning typically with a didactic introduction (based on assigned homework reading), followed by group discussion or small group work (to promote active learning), and ending with a reflective component (labeled an “educational autopsy”) to encourage scholars to identify effective instructional techniques among those used in each session. This latter activity has been shown to be very powerful in promoting the power of modeling on subsequent retention and application of concepts.

EDUCATIONAL OBJECTIVES BY CONTENT DOMAIN

Domain: Principles of Education and Learning

Scholars will be introduced to major concepts in the field, and form a basis for future sessions. A glossary of terms will be provided. Topics covered will include Principles of Adult Learning, Writing Learning Objectives, Choosing a Teaching method.

Goal: *Understand the underlying principles of medical education, with an emphasis on educational management principles and learning theory.*

Domain: Assessment and Evaluation

These sessions will cover psychometrics, including the theory of test construction, as well as principles of individual learner assessment and program evaluation. Topics will include Choosing an Assessment Method, Item Writing, Competency Assessment, and Program Evaluation.

Goal: *Participants will develop a broad-based understanding of assessment issues in the educational context, targeted at the individual as learner.*

Domain: Teaching Methods

These sessions will introduce scholars to effective techniques and resources available for improving teaching in the clinic, on the ward, and in the lecture hall. Topics include Giving Effective Feedback, and Simulation in Medical Education.

Goal: *Participants are going to learn new teaching techniques, with an opportunity to practice them.*

Domain: Educational Research Methodology

Scholars will be introduced to basic methodology in educational research, with applications and examples taken from healthcare education. Topics include Survey Research and Questionnaire Design, Designing a Research Question, Funding in Healthcare Education, Quantitative and Qualitative Methods.

Goal: *Participants are going to learn basic methodology in educational research.*

Domain: Professional and Leadership Development

These sessions introduce scholars to leadership skills and issues and opportunities in the academic healthcare setting. Topics include Organizational Change and Strategies for Capitalizing on Educational Leadership Opportunities.

Goal: *Participants will know principles of effective leadership in the context of an academic health center. There will be some emphasis on understanding educational administration.*

SCHOLAR'S ROLE

Scholar–Consultant Relationship

Session leaders (consultants) have volunteered their time to help you understand the process of medical education and are excited about the opportunity to assist you in developing projects for innovation or scholarship. Please note that the consultants are here to advise you in the process of developing your project, not necessarily in the content.

The consultants are also available for advice about your professional development in medical education and can help you recognize opportunities for other roles, resources, and collaborators. We will help you identify consultants with the expertise and resources necessary for you to make progress in this field and to develop your teaching role and responsibilities.

Sorcerer's Apprentice Role/Educational Autopsy

One of the roles that the scholars take on during HESP is what we have termed the “Sorcerer’s Apprentice.” In this role, a scholar is linked with a presenting faculty member for a specified future session. The sessions to which a Scholar is assigned to serve as “Sorcerer’s Apprentice” are shown in the HESP Session Calendar. Prior to the session, the sorcerer’s apprentice should contact the Session Presenter, to discuss the scheduled session. We want to include the scholars in the planning process, both as an educational experience and as a means to increase the relevance of the material to scholar needs and interests. During the session, the Sorcerer’s Apprentice will observe what worked and what could be improved, focusing on the educational process used in the session. Immediately following the presentation, the apprentice leads a reflective discussion (the “Educational Autopsy”) with the other Scholars, examining how the specific activities contribute to, or detract from, the session’s objectives, and what alternative methods might have been considered. Following the session, the Apprentice may share a constructive summary of the educational review with the presenter.

Scholar's Role for each HESP Session

The bulk of each HESP session will be devoted to a topic relevant to medical education practice, research and development. The role for all Scholars for each HESP session is described below.

1. Prior to the HESP Session

This is a good time to think (both conceptually and operationally) about what it means to learn. Learning is usually defined as a change in behavior. However, before an observable/measurable change in behavior occurs there are often interim steps. For example, one form of learning is the acquisition of knowledge that will subsequently lead to a change in behavior. Also, a change in attitudes can lead to a change in behavior. With skills, the desired change in behavior may be integrated into the learning process itself, e.g. practicing part of the physical examination.

2. Observing the HESP Session

When we think about evaluating a learning session often the first thing that comes to mind is “Did people like the session?” “Did they like the instructor?” While these are valid questions to address during the educational autopsy they are not usually the most instructive questions. In most cases, the primary focus of an educational autopsy should be on questions about the impact of the educational methods used during the HESP session on the learning outcomes, desired or actual. A well-designed educational session has clear objectives leading to the selection of educational methods, which have a high probability of achieving those objectives, (i.e. resulting in the type of learning desired).

As you observe an HESP session keep the following question in mind. “Are the methods being employed in this session well suited to the nature of the educational goals?” For example, is the primary objective to facilitate a change in attitudes toward some aspect of medical education, or is the primary objective the acquisition of knowledge designed to make the learners more effective medical educators? Educational methods designed primarily to influence attitudes are generally different from those designed primarily to influence knowledge, and are usually different from those designed to help people acquire skills. Although these categories are not mutually exclusive most educational sessions have a primary objective(s) that involves either changes in knowledge, skills, or attitude, leading to a change in behavior.

3. Conduct of the HESP Educational Autopsy

The purpose of the educational autopsy is to facilitate a critical examination of the HESP session so that we can glean useful information about the processes of teaching and learning. We hope that these insights will be subsequently employed by the scholars in their own teaching and medical education research. Again, while it is quite acceptable to ask people whether they enjoyed the session and/or liked the instructor's style, we strongly encourage you to also focus on a critical examination of the educational methods employed. How did the method(s) fit with the educational objectives? Was the method employed effectively?

Although the Sorcerer's Apprentice will lead the educational review, all scholars will participate. The autopsy itself can be conducted as a large group discussion in which these issues are addressed systematically or you can use your creativity as an educator to make the autopsy a more interesting educational experience by employing some of the educational methods you have observed and discussed to date. We are available to you at any time for consultation prior to or after your conduct of the educational autopsy.

4. Evaluate the Session

Scholars are expected to complete evaluations after each session. Evaluating a session serves two purposes: 1) it provides feedback to the speaker and the course administrator 2) the majority of instructors donate their time to teach, therefore in exchange the evaluations is used in the instructors teaching dossier.

Scholar's Hour

The Scholar's Hour is designed specifically to give each scholar an opportunity to pursue an area of interest with the rest of the group. This could take the form of a group discussion on practical application and problem, a review of a journal article, an educational experiment, or some other creative format. Some expansion on these options follows.

1. Educational Experiment

The "educational experiment" gives you an opportunity to try something new in a safe environment and to get valuable feedback. The type of experiment is entirely up to you. You can do a small group activity, try a problem-based learning module, practice a case-based lecture, pilot test an innovative evaluation method, get feedback on a computer-based instructional unit, etc. Use this as an opportunity to try something new that might be useful in your present responsibilities or that is of interest to you for more general reasons.

After your experiment, you will have the chance to get feedback from the group. You will lead the feedback session. In order to do this effectively, and to give you some guidance in planning your session, we ask you to answer the following questions. Use these questions to help prepare your experiment and also to direct the feedback session.

- What are your goals?
- How will what you do reflect these goals?
- How will you know whether or not it works?

2. Journal Club

The "journal club" will focus our attention on an article in the medical education literature and will provide an opportunity to discuss the conceptual framework, hypotheses, study design, methods, interpretation and conclusions of the work. The selection of the article is the choice of the scholar but needs to be done in advance to give all a chance to read it in preparation.

3. Practical Applications and Problems

As the year progresses, some of the sessions will suggest follow-up questions or applications. These applications and linkages between session topics are options for discussion in the scholar's hour.

COMPLETION OF HESP

There are three requirements to successfully completing the course:

- 1) The scholar must attend 75% of the sessions. Although some sessions may allow remote access this will not count as attendance
- 2) Scholars must complete the Tri Council Policy Statement: Ethical Conduct for Research Involving Humans online tutorial (TCPS-2). This certificate is required by the Ottawa Health Science Network Research Ethics Board to conduct research with human participants. More information can be found at <http://www.ohri.ca/ohsn-reb/default.asp>.
- 3) All scholars will be expected to have submitted a project proposal. A project could include research, workshops, simulated scenario, or other educational innovations. As such, each scholar will be expected to submit a proposal to the organizer any time before the completion of the HESP sessions. Although the quality of the proposal will not factor into the successful completion of the course, it is expected that the proposal will reflect learning from the HESP sessions and formative feedback by the organizer will be provided back to the scholars in a timely manner.

The proposal should be no more than 1500 words in length (not including references and appendices) and should include the following sections.

For research project:

Title – includes title of the project, names of possible collaborators or expertise of collaborators who would be needed

Introduction – includes literature review and research question

Methods – includes information about participants, design, analyses

Implications – includes information about expected results and implications for the field.

For an educational innovation:

Title – includes title of the project, names of possible collaborators or expertise of collaborators who would be needed

Introduction – includes literature review and description of why the innovation is important

Methods – includes information about participants, design of the innovation, any analyses of impact

For those scholars who already have ongoing medical education projects, a description of these projects can serve as your submission as long as the 1500 word limit is respected.

HESP EVALUATION FORM

Please complete this evaluation and return it to the coordinator at the end of the session

Date:

Instructor:

Event Title:

Objectives:

-
-
-

Please rate the quality of this activity on a scale of 1 (strongly disagree) to 5 (strongly agree)

Met the stated learning objectives	1	2	3	4	5
Enhanced my knowledge	1	2	3	4	5
Satisfied my expectation	1	2	3	4	5
Conveyed information that applied to my education activities	1	2	3	4	5
Allocated at least 25% of the time for interaction	1	2	3	4	5
Was free from commercial bias	yes _____		No _____		

Were any of the following CanMEDS / CanMEDS-FM roles addressed in this session?

Medical/FM Expert	Yes _____	No _____	Communicator	Yes _____	No _____
Collaborator	Yes _____	No _____	Manager	Yes _____	No _____
Health Advocate	Yes _____	No _____	Scholar	yes _____	No _____
Professional	Yes _____	No _____			

What did you learn or how will this event impact your education activities:

Evaluation of Presenter

Please rate the quality of the Presentation on a scale of 1 (poor) to 5 (excellent)

Name of Presenter	Overall Presentation Effectiveness					Content Relevance					Used Effective Presentation Method				
	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5

Additional comments:

This program has been reviewed and approved by the University of Ottawa Office of Continuing Medical Education, and qualifies as an Accredited Group Learning Activity (section 1) as defined by the Maintenance of Certification Program of the Royal College of Physicians and Surgeons of Canada. This Group Learning program meets the certification criteria of the College of Family Physicians of Canada and has been certified by the University of Ottawa's Office of Continuing Professional Development.

Cette activité est une activité de formation collective agréée aux termes de la section 1 du programme de Maintien du certificat du Collège royal des médecins et chirurgiens du Canada. Ce programme d'apprentissage en groupe répond aux critères de certification du Collège des médecins de famille du Canada et le Bureau de formation professionnelle continue de l'Université d'Ottawa

HEALTHCARE EDUCATION SCHOLARS PROGRAM

2017-2018- PROPOSED COURSE CALENDAR

SESSION	Date	TOPIC	Potential Speakers
1	Sept 19, 2017	Orientation to the HESP and Scholarship in Medical Education	Tim Wood/Susan Humphrey-Murto
2	Sept 26, 2017	Developing a Research Question	Tim Wood
3	Oct 3, 2017	Elements of a Research Grant	Tim Wood
4	Oct 10, 2017	Information Management in Medical Education/Publishing/Reference Management	Lindsey Sikora, Isabelle Castonguay
5	Oct 17, 2017	Principles of Lifelong Learning	Douglas Archibald
6	Oct 24, 2017	Principles of Good Teaching	Douglas Archibald
7	Oct 31, 2017	Competency Based Medical Education	Claire Touchie
	Nov 7, 2017	NO SESSION	
8	Nov 14, 2017	History of Medicine	Susan Lamb
9	Nov 21, 2017	Curriculum Development	Jason Frank
10	Nov 28, 2017	Selecting Best Teaching Methods	Robert Bell
11	Dec 5, 2017	Survey Research/Web Design	Doug Archibald
12	Dec 12, 2017	Quantitative Methods	Meghan McConnell
	Dec 19 to Jan 3	NO SESSION – CHRISTMAS BREAK	
13	Jan 9, 2018	Basic Principles of Assessment	Sue Humphrey-Murto
14	Jan 16, 2018	Test Validity	Tim Wood
15	Jan 23, 2018	Feedback	Samantha Halman
16	Jan 30, 2018	Organizational Change	Deborah Danoff
17	Feb 6, 2018	Qualitative Methods	Simon Kitto
18	Feb 13, 2018	Qualitative Methods: Resources and Publishing	Simon Kitto
19	Feb 20, 2018	Program Evaluation	Gary Viner, Alison Eyre
20	Feb 27, 2018	Remediation Plans	Carol geller
21	Mar 6, 2018	Interprofessional Education	Prudy Menard
	Mar 13, 2018	NO SESSION – SPRING BREAK	
22	Mar 20, 2018	Simulation	Vicki LeBlanc and Ashley Krywenky
23	Mar 27, 2018	MCQs: Writing and Reviewing Quality Items	Debra Pugh
	April 3, 2018	NO SESSION – Meridith Marks Day (April 6, 2018)	
24	April 10, 2018	OSCE Station Writing	Debra Pugh
25	April 17, 2018	Leadership	Deborah Danoff
26	April 24, 2018	Back up day	TBD
	May 1, 2018	NO SESSION CCME	
27	May 8, 2018	Needs Assessment	Aimee Sarti
28	May 15, 2018	Story Telling	Marta Singh
29	May 22, 2018	Becoming a Medical Education Leader	Warren Cheung and Geny Moineau
30	May 29, 2018	Annual Review	Tim Wood

SESSION-SPECIFIC LEARNING OBJECTIVES

Sessions 2017-2018

Session 1: Orientation to the HESP and Scholarship in Medical Education

Domain: *Principles of Education and Learning*

Part 1

By the end of the session, the participant will be able to

1. Identify program objectives for the HESP
2. Discuss goals and objectives in detail

Part 2

By the end of the session, the participant will be able to

1. Define educational scholarship.
2. Distinguish between teaching, scholarly teaching and educational scholarship.
3. List Glassick's 6 standards for scholarship.

Session 2: Developing a Research Question

Domain: *Educational Research and Methodology*

As a result of this session, you will:

1. Identify processes behind creating a research question.
2. Used these process to create a research question.
3. Describe your research question to others

Session 3: Elements of a Research Grant

Domain: *Educational Research and Methodology*

As a result of this session, you will be able to:

1. Describe the grant review process
2. Identify parts of a grant
3. Identify common mistakes found in grants

Session 4: Information Management in Medical Education/Publishing

Domain: *Educational Research Methodology*

As a result of this session, you will:

1. Select appropriate resources covering medical education to search based on information needs and apply strategies to construct effective searches.
2. Describe common metrics used to evaluate the impact of journals, articles, and authors.
3. Describe the Open Access publishing model, its significance, and uOttawa's support of this model.
4. Learns the basics of using Mendeley, including importing and organizing references, and creating in-text citations and bibliographies.

Session 5: Principles of Lifelong Learning

Domain: *Principles of Education and Learning*

As a result of this session, you will:

1. Define lifelong learning, workplace learning
2. Describe some theoretical approaches to adult learning
3. Discuss how lifelong learning behaviours can be integrated into teaching and learning
4. Identify the current theories underlying workplace learning
5. Identify current trends in workplace assessment

Session 6: Principles of Good Teaching

Domain: *Principles of Education and Learning*

As a result of this session, you will be able to:

1. Share your definitions of learning
2. Identify the basic assumptions of traditional learning theories
3. Describe some newer approaches to learning
4. Understand the differences among learning objectives, outcomes, and competencies
5. Write learning outcomes for knowledge, skills, and attitudes.

<p>Session 7: Competency Based Medical Education: What is it all about? Domain: <i>Principles of Education and Learning</i> As the result of this session, you will:</p> <ol style="list-style-type: none"> 1. Describe the elements of competency-based assessments 2. Recognize similarities and differences among various competency-based assessment terminology: objectives vs. milestones vs. entrustable professional activities (EPAs) 3. Outline opportunities and challenges to changing the system
<p>Session 8: History of Medicine Domain: <i>Teaching Methods</i> As the result if this session, you will:</p> <ol style="list-style-type: none"> 1. Appreciate that History is a research discipline with methods and findings that enhance our understanding of the medical present 2. Recognize ways in which History, and Humanities as a whole, can help trainees master knowledge and skills at the heart of the Physician Competency Framework 3. Describe how historical thinking strengthens a physician’s understanding of social, cultural, and technological determinants that influence the impact of disease on individuals and society
<p>Session 9: Curriculum Development Domain: <i>Teaching Methods</i> As the result if this session, you will:</p> <ol style="list-style-type: none"> 1. List common competency-based curriculum planning advantages and challenges 2. Describe stages of a curriculum design cycle including: <ol style="list-style-type: none"> a. Needs assessment b. Planning and design c. Implementation d. Assessment e. Program evaluation and evolution including changes and faculty development 3. Develop solutions to overcoming curriculum challenges in their own educational environment
<p>Session 10: Selecting the Best Teaching Methods Domain: <i>Teaching Methods</i> As a result of this session, you will:</p> <ol style="list-style-type: none"> 1. Discuss how to incorporate active learning strategies into any teaching activity 2. Practice an active learning technique, Team Based Learning 3. Know how to choose teaching methods to achieve the best learning for their learning objectives
<p>Session 11: Survey Research/Web Design Domain: <i>Education and Research Methodology</i> As the result of this session, you will:</p> <ol style="list-style-type: none"> 1. Identify when to use a survey and why 2. Describe the key principles involved in designing and implementing an effective survey 3. Evaluate a variety of surveys 4. Describe the role of reliability and validity in survey research 5. Describe how to analyze and display survey results
<p>Session 12: Quantitative Methods Domain: <i>Education and Research Methodology</i> As the result of this session, you will:</p> <ol style="list-style-type: none"> 1. List 4 criteria for selecting a good research question, and evaluate your own research question 2. List study designs and select and/or list potential strengths and weaknesses as related to your own research 3. Describe and apply the following concepts/issues to your research question: placebo, pre-test, outcomes, factorial design, statistical significance, sample size, effect size. 4. List statistical tests that can be used for examining differences between groups and examining relationships between variables.

<p>Session 13: Basic Principles of Assessment Domain: <i>Assessment and Evaluation</i> As the result of this session, you will:</p> <ol style="list-style-type: none"> 1. List and describe the principles of assessment design including the following concepts: Purpose of the assessment, Formative or summative, Level of performance required, Blueprint, Standard Setting, Validity, Reliability, Utility equation. 2. Apply these principles to written (example; multiple choice questions) and performance based examinations (example; OSCE) relevant to participant's context.
<p>Session 14: Test Validity Domain: <i>Assessment and Evaluation</i> As the result of this session, you will be able to:</p> <ol style="list-style-type: none"> 1. Describe the 13 tools in the ACGME toolbox. 2. Select an appropriate method of assessment 3. Describe the types of validity evidence
<p>Session 15: Feedback Domain: <i>Teaching Methods</i> As the result of this session, you will:</p> <ol style="list-style-type: none"> 1. Identify common barriers to giving effective feedback 2. Outline the characteristics of effective feedback and identify strategies to improve the quality of the feedback 3. Demonstrate an approach to providing feedback in the clinical setting using available tools
<p>Session 16: Organizational Change Domain: <i>Professional and Leadership Development</i> As the result if this session, you will be able to:</p> <ol style="list-style-type: none"> 1. Describe the critical features necessary for change management. 2. Distinguish between different types of leadership 3. Discuss the formation of high performing teams 4. Describe the challenges of balancing leadership and clinical responsibilities.
<p>Session 17: Qualitative Methods Domain: <i>Education and Research Methodology</i> As the result of this session, you will:</p> <ol style="list-style-type: none"> 1. Identify and describe five approaches to qualitative research and their associated methods. 2. Select and apply a qualitative approach and methods for a medical education research problem and summarize the rationale for their choices. 3. Critically appraise a qualitative medical education research article.
<p>Session 18: Qualitative Methods: Interviewing for Qualitative Research Domain: <i>Educational Research Methodology</i> As the result if this session, you will:</p> <ol style="list-style-type: none"> 1. Describe the advantages and disadvantages of interviews; 2. Explain how to set up and conduct an interview; 3. Describe how to creating an interview guide and practicing qualitative interviewing.
<p>Session 19: Program Evaluation Domain: <i>Assessment and Evaluation</i> As the result if this session, you will:</p> <ol style="list-style-type: none"> 1. Plan the sequence of activities within an assessment program 2. Build a limited logic model to evaluate an assessment program.
<p>Session 20: Remediation Plans Domain: <i>Teaching Methods</i> As the result if this session, you will:</p> <ol style="list-style-type: none"> 1. Create a learning plan based on a learner's deficiencies in key CanMEDs roles 2. Develop an appropriate remediation/probation plan suited to the learner in difficulty 3. Outline the remediation, probation, dismissal and appeals process at the University of Ottawa
<p>Session 21: Interprofessional Education Domain: <i>Principles of Education and Learning</i></p>

<p>As the result of this session, you will: TBD</p>
<p>Session 22: Simulation Domain: <i>Teaching Methods</i> As the result of this session, you will:</p> <ol style="list-style-type: none"> 1. Describe different simulation modalities. 2. Discuss some education theory behind simulation based education for lifelong learning and assessment. 3. Discuss the role of simulation to address and improve patient safety through high quality research.
<p>Session 23: MCQs: Writing and Reviewing Quality Items Domain: <i>Assessment and Evaluation</i> As the result of this session, you will:</p> <ol style="list-style-type: none"> 1. Define the anatomy of multiple-choice item 2. Define and identify technical flaws 3. Review created multiple-choice items 4. Create MCQs using cognitive models
<p>Session 24: OSCE Station Writing Domain: <i>Assessment and Evaluation</i> As the result of this session, you will:</p> <ol style="list-style-type: none"> 1. Discuss how various sources of evidence can be used to demonstrate validity for the interpretation of OSCE scores. 2. Describe what can and should be tested with an OSCE. 3. Describe the steps in creating an OSCE station. 4. Describe different scoring options for a station.
<p>Session 25: Leadership Domain: <i>Professional and Leadership Development</i> As the result if this session, you will:</p> <ol style="list-style-type: none"> 1. Identify different types of leadership and leadership styles 2. Recognize their own approaches to dealing with conflict 3. Identify additional resources to support their leadership activities and plans
<p>Session 26: back up day</p>
<p>Session 27: Needs Assessment Domain: <i>Assessment and Evaluation</i> As the result if this session, you will be able to:</p> <ol style="list-style-type: none"> 1. Describe how to design a needs assessment including the relevance of: Triangulation, Diagnose gaps & Consider potential solutions 2. Describe how to prepare a limited list of program objectives based on: Concepts of cognitive psychology and clinical medicine, educational modalities & assessment instruments
<p>Session 28: Story Telling Domain: <i>Teaching Methods</i> As the result of this session, you will:</p> <ol style="list-style-type: none"> 1. Gain awareness of story as <i>language</i>. 2. Describe the fundamental notions of narrative structure 3. Describe the essential elements required to translate information into story 4. Describe how to use story as a means of connecting with people
<p>Session 29: Becoming a Medical Education Leader Domain: <i>Professional and Leadership Development</i> As the result if this session, you will:</p> <ol style="list-style-type: none"> 1. Describe how a program of research is developed including the importance of mentors, collaborators, persistence, and the balance between being a clinician educator and a medical education researcher 2. Reflect on leadership experience of speakers and plan to incorporate at least one suggestion in your career development as a leader.
<p>Session 30: Annual Review Reflect on the course as a whole and on individual sessions in order to provide a recommendation as to what sessions to keep, remove, or modify.</p>

HEALTHCARE EDUCATION SCHOLARS PROGRAM

2017-2018

DECLARING AND DISCLOSING CONFLICT OF INTEREST

The University of Ottawa, Office of Continuing Professional Development (OCPD) requires that all presenters and members of planning committees complete this Disclosure of Conflict of Interest form. The 2007 CMA Guidelines for Physicians in Interaction with Industry, Section 24, states that

“CME/CPD organizers and individual physician presenters are responsible for ensuring the scientific validity, objectivity and completeness of CME/CPD activities. Organizers and individual presenters must disclose to the participants at their CME/CPD events any financial affiliations with manufacturers of products mentioned at the event or with manufacturers of competing products.”

This serves as the basis for the University of Ottawa’s Conflict of Interest policies; adapted from the Royal College and the College of Family Physicians of Canada form. The intent of this policy is not to prohibit speakers from presenting, but rather to inform the audience of any bias that speakers may have.

All completed original forms must be retained by the party submitting the program for accreditation (referred to herein as the “CPD provider” or “CPD organizer”) for a period of one year following certification expiry, so that they are available in the event that the program is audited.

Planning committee’s forms: Completed forms for each planning committee member *must* be submitted at the time of application for certification.

Presenters’ forms: These forms must be submitted if speakers are known at the time of application for certification. If speakers/presenters are not yet known, the forms do not need to be submitted at the time of application for accreditation. Completed forms for each presenter or speaker and copies of all speaker/presenter COI forms must be retained by the CPD provider.

A **conflict of interest** is a situation in which the personal and professional interests of individuals may have actual, potential, or apparent influence over their judgment and actions.

The basics

1. **All planning committee members’ and presenters’ financial or in-kind relationships** (not only those relevant to the subject being discussed) **encompassing the previous two (2) years, up to and including the current presentation, must be declared and disclosed.**
2. It is the presenter’s responsibility to ensure that their presentations (and any recommendations) are balanced and reflect the current scientific literature. The only caveat to this guideline is where there is only one treatment or management strategy. *Unapproved use of products or services must be declared within the presentation.*
3. Disclosure must be done verbally *and* displayed in writing at the beginning of a presentation or included in the written conference materials.
4. The conflict-of-interest declaration forms must be completed and submitted to the CPD program’s provider or organizer prior to the start date of the event or program.

How to complete the Declaration of Conflict of Interest form

There are two parts to the form:

- **Part 1** must be completed by all presenters and planning committee members
- **Part 2** must be completed by all presenters

Examples of relationships that must be disclosed include, but are not limited to, the following:

- Any direct financial interest in a for-profit entity such as a pharmaceutical organization, medical device company, or communications firm, or other financial supporter of the program (“the Organization”)
- Investments held in the Organization
- Membership in the Organization’s advisory board or similar committee
- Current or recent participation in a clinical trial sponsored by the Organization
- Being a member of a speakers’ bureau
- Holding a patent for a product referred to in the CPD activity or marketed by a commercial organization
- Receiving honoraria to speak on behalf of a pharmaceutical organization or medical communications company, including talks for which the individual has been contracted but has not yet received payment for

False disclosure or failure to disclose conflict of interest as outlined in this document could require the planning committee to replace the presenter/speaker. Individuals’ completed forms must be returned to the CPD program provider or organizer, and not directly to the Office of CPD.

The uOttawa Declaration of Conflict of Interest Form

Part 1: Presenters and Planning Committee Members

All presenters and planning committee members must complete this form and submit it to the identified CPD program’s provider or organizer. **Disclosure must be made to the audience whether you do or do not have a relationship** with a for-profit entity such as a pharmaceutical organization, medical device company, communications firm, or other for-profit funder of the program. If you require more space, please attach an addendum to this page.

- ☐ I *do not* have an affiliation (financial or otherwise) with a pharmaceutical, medical device, or communications organization, or other for-profit funder for this program. (Speakers who have no involvement with industry should inform the audience that they cannot identify any conflict of interest.)
- ☐ I *have/had* an affiliation (financial or otherwise) with a pharmaceutical, medical device, or communications organization.

Complete the sections below that apply to you now or during the *past two (2) calendar years up to and including current year*. Please indicate the for-profit organization(s) with which you currently have/had affiliations, and briefly explain what connection you have/had with the organization(s). You must disclose this information to your audience both verbally *and* in writing.

	Company/Organization	Details
I am a member of an advisory board or equivalent with a commercial organization.		
I am a member of a speakers’ bureau.		
I have received payment from a commercial organization (including gifts or other consideration or in-kind compensation).		
I have received/or will be receiving a grant or an honorarium from a commercial organization.		
I hold a patent for a product referred to in the CPD program or that is		

marketed by a commercial organization.		
I hold investments in a pharmaceutical organization, medical device company, or communications firm.		
I am currently participating in or have participated in a clinical trial within the past two years.		
I have a relationship with one or more other for-profit organizations that are funders of this program.		

Part 2: Presenters

Only presenters must complete this section.

	Circle one		
I intend to make therapeutic recommendations for medications that have not received regulatory approval (ie, "off-label" use of medications).	Yes	No	You <i>must</i> declare all off-label use to the audience during your presentation.

The University of Ottawa OCPD requires faculty presentations to be consistent in their use of either generic names or trade names, or both generic and trade names during their presentation.

Check all that apply:

- ☐ I am a presenter
- ☐ I am a planning committee member

Acknowledgement:

Name/title of program/event: _____

Acknowledgment:

I, _____, acknowledge that I have reviewed the declaration form's instructions and guidelines and that the information above is accurate. I understand that this information will be publically available.

Signature: _____ Date: _____

HEALTHCARE EDUCATION SCHOLARS PROGRAM 2017-2018

CME/CPD CREDITS

This event is an Accredited Group Learning Activity (Section 1) as defined by the Maintenance of Certification program of the Royal College of Physicians and Surgeons of Canada for 94.5 hours. This program has been reviewed and approved by the University of Ottawa, Office of Continuing Professional Development.

This Group Learning program meets the certification criteria of the College of Family Physicians of Canada and has been certified by the University of Ottawa's Office of Continuing Professional Development for up to 94.5 Mainpro+ credits.

Cette activité est une activité de formation collective agréée aux termes de la section 1 du programme de Maintien du certificat du Collège royal des médecins et chirurgiens du Canada pour 94,5 heures. Ce programme a été révisé et approuvé par le Bureau de formation professionnelle continue de l'Université d'Ottawa.

Ce programme d'apprentissage en groupe répond aux critères de certification du Collège des médecins de famille du Canada et le Bureau de formation professionnelle continue de l'Université d'Ottawa lui accorde jusqu'à 94,5 crédits Mainpro+