

## Guideline for Co-Development with CSIM

As an accredited CPD provider, the Canadian Society of Internal Medicine (CSIM) can educationally co-develop specialist continuing professional development (CPD) activities with non-physician organizations\* for Section 1 credit in the [Maintenance of Certification \(MOC\)](#) Program of the Royal College of Physicians and Surgeons of Canada.

Co-development is defined by the Royal College as the process by which two or more organizations — at least one of which must be a physician organization — prospectively collaborate to develop and implement an accredited educational activity, learning resource or tool.

\*Types of non-physicians organizations:

- Disease-oriented patient advocacy organizations (e.g. Canadian Diabetes Association)
- Government departments or agencies (e.g. Health Canada, Public health Agency of Canada)
- Industry (e.g. pharmaceutical companies, medical device companies, etc.)
- Medical education or communications (MEC) companies (e.g. CME Inc.)
- For-profit online educators, publishing companies or simulation companies (e.g. Medscape, CAE)
- Small number of physicians working together to develop educational programming

**The CSIM must be contacted before any program planning commences.** This includes planning committee selection, needs assessment, development of learning objectives, speaker selection, program design, implementation and evaluation. This constitutes educational co-development. Note that a sponsor cannot take part in the planning process, be on the planning committee, select speakers nor be involved in the development of learning objectives.

### FEE STRUCTURE

PROVIDER	ACCREDITATION PROCESS (Section 1 and Section 3)	FEE**	NON-REFUNDABLE APPLICATION FEE*
Non-physician organization	Educational co-development where CSIM would be represented on the planning committee from the onset of planning.	\$12,000 Plus \$375 for each recurring event.  If additional funding agreements are required: \$1,500 grant administration fee per each funding agreement.	\$2,000 (plus HST)

\* Non-refundable application fee must accompany the application (if approved, this fee will be applied to the co-development fee). If the proposed program is not accepted, the application fee is non-refundable.

\*\*The balance of the fee will be due when program planning commences and shall be taken from the educational grant upon receipt; no refunds will be issued for any reason once planning has begun.

Note: Program planning cannot commence until the educational grant has been received.

## Co-Development Checklist

Please review and complete the checklist below indicating that you have reviewed the requirements in order to co-develop an accredited educational program with the Canadian Society of Internal Medicine.

### Educational Grant

- The educational grant (full amount) is to be made payable to CSIM for administration. CSIM will disburse all expenses, honoraria, and costs associated with the program including payments to a medical communications company (MCC).
- Fees will be disbursed from the educational grant only to the extent that funding has been received by the CSIM; if partial funding has been received, no outstanding fees, costs, honoraria will be paid until additional funds are received.
- A funding agreement is to be in place and funds received by the CSIM prior to the commencement of planning.
- The funding agreement between physician organization and sponsor must be sent to CSIM well in advance; the review process may take several weeks.
- If the provider of the educational grant has specific financial reporting requirements, please describe:

### CSIM Fees

- The co-development fee of \$12,000 + HST is payable upon acceptance to co-develop; once the planning process has commenced, CSIM fees are non-refundable for any reason.
- The co-development fee is due immediately upon receipt of the educational grant.

### Development

- Sponsors cannot take part in the planning process nor can they be on the planning committee.
- Sponsors cannot input on educational content or learning objectives.
- Medical writers may review or complete the content, however the steering committee must write the majority of the content. Medical writers may be hired by the non-physician organization or steering committee, but not by the sponsoring organization.
- Before program launch, the final slides are to be reviewed and approved by CSIM. If there is no slide deck, the content manuscript will be reviewed.
- All program content and documents are the property of CSIM and cannot be used for any other purpose without written permission from the CSIM.

### Accreditation

- There can be no mention of “accreditation pending”. Accreditation cannot be mentioned until the program has received final approval for accreditation.

- Review for accreditation is included in the co-development fee.
- Accreditation statements are to be located within the scientific content/program, and cannot be located near sponsorship recognition.
- Non-accredited activities are not to be advertised in the program of an accredited event and are not to compete with accredited activities.

### **Implementation**

- All faculty and planning committee members must disclose all relationships (not just those directly related to the topic or content being discussed at the event) over the previous two years. These are to be sent to the CSIM several weeks prior to the event.
- Implementation documents (certificate of attendance, invitations to speakers, etc.) may be prepared by the MCC and must be reviewed and approved by CSIM.
- Program materials (printed or online) are to be sent to CSIM for review prior to publication/circulation.
- Expenses for logistical items (e.g. audio visual, meals) are to form part of the educational grant and disbursed by CSIM. The MCC may pay for such logistical items and submit receipts to CSIM for reimbursement from the grant.
- Sponsors may promote the event. A postcard with the event details can be prepared and circulated (by email and/or paper). Any postcards or invitations must be approved by the CSIM before circulation.
- Registration information is to be collected and maintained by the co-developing organization (not the sponsor) and is to be forwarded to CSIM after each event.
- Registrant information / contact information is to be used solely for the management of this program and is not be used for any other purpose, shared, or sold.
- Sponsors may assist with logistical items such as booking the venue, arranging for audio visual, ordering refreshments but are not to pay for these items directly
- Travel and accommodation cannot be provided to delegates nor family members of faculty.
- A summary of conflict disclosures of faculty and planning committee members are to be disclosed to participants. If there are no conflicts, this should also be disclosed. This could be done via printed handout, listed within the program or online, or included within the first 3 slides of the presentation; please send CSIM a copy of this summary prior to each event.
- There should be disclosure of any off-label use of pharmaceutical agents or medical devices.
- For live events, any signage used onsite must first be reviewed and approved by CSIM. Signage with sponsor recognition cannot be located within the room where the educational activity is taking place.
- Implementation fees incurred by the non-physician organization/MCC are to be invoiced to CSIM in actual dollars after each session has taken place; all receipts are required.
- Speaker/faculty honoraria and/or expenses will be disbursed by the CSIM.
- A summary of the completed evaluation form data is to be prepared by the MCC and sent to CSIM after each event.

Each speaker is to receive a summary of their evaluation feedback after the event with a copy of the email to [info@csim.ca](mailto:info@csim.ca).

### Termination of Agreement

In the event that any part or all of a co-development agreement is cancelled for any reason after any or all funding has been received by CSIM, the MCC may invoice for services rendered to date and any costs they are unable to cancel; payment will be made to the extent that funds have been received by CSIM and are available after all other payments have been made.

In the event of a shortfall of funds from the educational grant, the CSIM shall not be responsible for any outstanding fees, expenses, honoraria.

All program content and documents are the property of CSIM and in the event of a termination of the agreement, CSIM retains ownership and control of any content and documents and these cannot be used for any other purpose without written permission from the CSIM.

### Other

The co-developing organization is to sign the CSIM Confidentiality Agreement.

If CSIM agrees to co-develop this program, no planning will commence until the educational grant has been received by the CSIM.

I have reviewed the [CMA Guidelines for Physicians in Interactions with Industry \(2007\)](#) and this program will adhere to it.

I have reviewed the [2018 National Standard for Support of Accredited CPD Activities](#).

I have reviewed the Royal College's [process for co-development of a CPD activity by a physician organization and a non-physician organization](#)

FOR ONLINE PROGRAMS: I have read and understand the [Criteria for approval of Online CPD Events for Maintenance of Certification](#).

I have reviewed the CSIM [accreditation information online](#).

For additional information on the Maintenance of Certification Program, please visit the Royal College website. [Royal College Accreditation Tool Kit](#).

### Application Fee

The Letter of Intent will not be considered until the application fee has been received.

The \$2,000 + HST non-refundable application fee is forthcoming by mail or courier, OR:

Please send the invoice for the \$2,000 + HST non-refundable application fee to:

Name: \_\_\_\_\_ Organization: \_\_\_\_\_ Email: \_\_\_\_\_

Please send this completed checklist as well as the following items to [info@csim.ca](mailto:info@csim.ca):

1. A Letter of Intent (outlining the potential topic, target audience, format timelines, and other pertinent information, [click here for the PDF template](#) or the [MS Word template](#).)
2. The \$2,000 + HST non-refundable application fee.
3. The historical/existing needs assessment (e.g., evaluation results from a prior session.)
4. Proposed budget.
5. Biographies or CV of proposed faculty members (if applicable.)
6. A copy of the sponsor's funding agreement (if applicable.)

The Letter of Intent will not be considered until the application fee has been received by CSIM. The balance of the co-development fees will be due when program planning commences; no refunds will be issued for any reason once planning has begun.

**Timelines:**

- The CSIM will confirm receipt of your Letter of Intent package within 72 hours.
- Allow up to 12 weeks for committee consideration (Letters of intent will not be considered until the application fee has been received).
- Allow an additional 6-12 months for content development.
- Allow an additional 8-12 weeks for accreditation review.
- Following program development, additional time will be required for the implementation process including several weeks for review of additional funding agreements, if required.

I have reviewed the timelines above and understand that they are estimates only.

You will be asked to complete the MOC Application Form at a later date. This can be reviewed and downloaded at the CSIM website: <http://csim.ca/education-moc/>. Please ensure the most recent application form is completed.

Please contact the CSIM Office by phone if you have any questions.

**I have reviewed the information above, and understand that programs which do not comply with these criteria are ineligible for co-development with the CSIM.**

**I understand and that if it comes to the CSIM's attention that these criteria are not met, CSIM has the right to cancel its participation in the program at any time without refund or compensation.**

**I understand that the terms outlined in this form shall take precedence over other agreements or documents in place with the MCC.**

Name: \_\_\_\_\_

Organization requesting co-development: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

Date: \_\_\_\_\_

Signature: \_\_\_\_\_

*I have authority to sign for the company as named.*

**CSIM CPD SUB-COMMITTEE MISSION STATEMENT**

**“Our ultimate goal is to go beyond the simple transmission of information. Our goal is to make a lasting impact on the knowledge, skills and attitudes of clinicians and future clinicians; to narrow the theory to practice gap; to improve the health of our patients and of all Canadians.”**

*January 2, 2019*