American Society for Parenteral and Enteral Nutrition

Chapter Continuing Education (CE) Handbook

July 2013

Chapter CE Handbook Table of Contents

I. Introduction

In October 2012, the A.S.P.E.N. board of directors approved a two-year pilot program of the re-establishment of a joint providership arrangement between the A.S.P.E.N. national office and affiliate chapters for the provision of continuing education (CE) credit to dietitians, nurses, pharmacists and physicians at chapter annual events. This program is available to all chapters in good standing. A chapter in good standing meets the following requirements:

1. Must be up-to-date on filing the chapter's annual report with A.S.P.E.N.
2. Must be listed as tax exempt on the IRS website: http://apps.irs.gov/app/eos/
3. Must have a current chapter officers roster on file with A.S.P.E.N.
4. All chapter members must be members of A.S.P.E.N. national

Additionally, chapters are not obligated to go through A.S.P.E.N. to provide CE credit for the annual events if another process is already in place that meets the needs of the chapter. The below timeline provides an overview of the time to launch, implement and review the joint providership arrangement.

- February 2013 – May 2013: Recruit and hire staff member to manage the program. Development of program implementation resources.
- July 2013 – release program materials to chapters
- June 2015: A.S.P.E.N. Board meeting to include evaluation of pilot and determination of future of the program
    - Note: based on a 2-year pilot program, chapter events through the fall of 2015 will be included. The Board will review in June 2015. If the program is discontinued, events approved for future meetings (including fall 2015 or possibly spring 2016) would still occur as planned.

II. Annual Timeline

One of the most important components of planning is allowing enough time in advance of the educational activity to accomplish all of the steps necessary to produce a CE compliant program for four different disciplines. To ensure both A.S.P.E.N. and chapters are able to meet all requirements of the four accreditation bodies, the following submission timeline has been established and must be adhered to annually.

Letter of Intent Due on or Before	Proposal Due on or Before	Event Dates
February 1	May 1	January, February, March
May 1	August 1	April, May, June
August 1	November 1	July, August, September
November 1	February 1	October, November, December

III. Costs and Disbursement of Funds

1. Joint providership fee paid by Chapter to A.S.P.E.N. per event ($250 due with signed LOA between A.S.P.E.N. and the chapter; $250 due 6 months prior to the event) **$500**
2. Percentage of registration fee to A.S.P.E.N.: **2% of all registration fees**
3. Credit card fees for online registration **4% of all fees**
   Note, this is not a change from current practice if registrations are submitted online
4. CE System Initial Set-up (paid by A.S.P.E.N.) **$1000**
5. CE System fee per event (up to 200 participants, paid by chapter) **$200**

A.S.P.E.N. suggests that chapters consider increasing the attendee registration fee slightly, such as by $5.00 or $10.00 to help offset the additional costs the chapter will incur. Additionally, if not already in place, chapters should charge different registration fees for chapter members and nonmembers.

Within 30 days of the chapter providing A.S.P.E.N. with onsite registration forms and payment, A.S.P.E.N. will disburse the registration funds to the chapters less the 2% to A.S.P.E.N., 4% credit card fees and $200 for the online CE system. Payment will include a detailed reconciliation form for chapter financial records.

IV. Attendee Registration

All individuals who participate in the chapter event as attendees must have a registration entered into A.S.P.E.N.'s association management database. Attendee registration is required via this avenue to ensure attendees have access to A.S.P.E.N.'s eLearning Center, where the program evaluations will be completed as well as the submission of claims for CE credit and records of earned CE credit will be stored.

Once the LOA between the chapter and A.S.P.E.N. is signed, the event can be created in the database and listed as a product for sale on A.S.P.E.N.'s website. The chapter is also encouraged to share the link via chapter websites, emails about the event, on event brochures, etc. The information that will be needed to create the program as an event is:

- Program title
- Program dates
- Program location
- Program registration fees (member and nonmember, discipline specific rates, effective dates for various fee structures, etc.)
- Program description
- Cancellation policy

Once the program is created, online registrations with payment via credit card will be accepted. Individuals who wish to pay via faxing or mailing the registration for chapter events should send or fax the appropriate registration form to A.S.P.E.N. with payment by check made payable to A.S.P.E.N. for the chapter event.

From the time registration opens, A.S.P.E.N. will provide the chapter with weekly registration reports up to the time of the event.

Attendees who register onsite at the event should complete a registration form and make checks payable to A.S.P.E.N. The chapter will then send the registration forms and payment to A.S.P.E.N. Sending this to A.S.P.E.N. should be done as soon as possible after the event to ensure the chapter receives their event registration fees in a timely manner to settle event-related financial obligations and that attendees can complete evaluations and claim CE credit.

V. A.S.P.E.N. and Chapter Responsibilities Charts

The below chart is a summary of the responsibilities of both A.S.P.E.N. and the chapter throughout the entire process of planning and implementing the program. Please note that the responsibilities are subject to change as accreditation guidelines change. A.S.P.E.N. will notify chapters of any changes as soon as possible. Following these lists, further along in the handbook is a detailed description on program development, checklists and sample forms to assist the chapter through the entire process.

A.S.P.E.N. RESPONSIBILITIES	REQUESTING ORGANIZATION RESPONSIBILITIES
Prior to developing a joint providership agreement • Update and/or create handbooks and other materials to assist chapters in applying for a co/joint sponsorship with A.S.P.E.N. • Identify a training tool for the chapter leaders and planning committee members to use to become educated on accreditation requirements as needed • Set annual timelines for chapters • Annually, notify chapters of the processes and deadlines for obtaining CE credits for their annual events. Share handbooks and other resources with chapter leaders annually • Upon receipt and acceptance of a letter of intent from a chapter, assign a member of the EPD committee to serve as the A.S.P.E.N. liaison to the chapter for planning of the event. • Upon receipt of proposals, the EPD committee will review and discuss each proposal, make suggestions for change as needed and vote on the proposal. • Communicate any needed changes to the program to the chapter planning committee. • Communicate the decision of the EPD committee to the chapter in regards to the proposal. • Once a proposal is accepted, provide the chapter president with a letter of agreement (LOA) to enter into with A.S.P.E.N. for the joint providership of the event.	**Prior to developing a joint providership agreement** • Review materials and timeline provided by A.S.P.E.N. • Complete the accreditation training tool as requested by A.S.P.E.N. • Form a planning committee for the annual event. Planning committee must include a dietitian, nurse, pharmacist and physician. • Submit a letter of intent to apply for joint providership to A.S.P.E.N. Letter of intent should include at *minimum:* the name and mission of the requesting organization; brief description of the program including anticipated date time and location of the event; names and contact information of the planning committee members; conflict of interest disclosures for each of the planning committee members; and a preliminary budget for the program. Submit letter of intent according to the annual timeline based on when the event will be offered. • Planning committee members and the EPD committee member liaison to collect and analyze practice gap information and subsequently develop event goals and objectives, plan the event, identify speakers, etc. Note: EPD committee member liaison is not a working member of the planning committee, but an advisor. *All meeting minutes need to be saved.* • NOTE: at no time during this planning phase should there be any discussions with any members of industry about the event. Individuals in industry may not provide suggestions for topics, speakers, etc. Industry employees cannot serve as speakers in chapter events. • Once the event is planned and speakers identified and invited, complete a proposal to submit to A.S.P.E.N. by the deadline noted in the annual timeline. Submission should include the proposal

A.S.P.E.N. RESPONSIBILITIES	REQUESTING ORGANIZATION RESPONSIBILITIES
	and any required documentation such as faculty conflict of interest disclosures, faculty CVs, etc. Proposals submitted after the deadline will not be considered. • Chapter president to work with A.S.P.E.N. to complete the LOA for the joint providership. • With a signed LOA, chapters will be required to submit a deposit for the co/joint sponsorship.
Once a joint providership agreement is established through the event • Establish the chapter event as a product for purchase in the association management database. • Enter event in the accreditation systems, assign pharmacist codes, etc. • Work with chapters on the development of marketing materials to ensure all necessary components are included. • Work with chapters on finalizing terms of the LOA with industry partners for support for the event. • CEO to sign all LOA's for support from industry partners. • Review with chapter leaders and planning committee members the rules for industry activities at live events. • Ensure sample forms in handbook are current for chapter to develop a speaker packet to chapters to share with the speakers – includes affirmation statements, acknowledgement of honoraria, slide template, etc. • Staff to participate in review of slides for commercial bias. • Assist chapters in the development of conference materials and syllabus. • Create an evaluation tool for use upon completion of the program • Build the chapter event into the online evaluation and CE system and work with the vendor to ensure system is functioning properly for each event. • Provide materials about A.S.P.E.N. for the chapter to feature in the exhibit hall or at	**Once a joint providership agreement is established through the event** • Create pricing structure for the event and submit the information to A.S.P.E.N. Chapters need to implement a member/nonmember fee structure. Chapters should consider increasing the fee by $10 for management of the program. • Begin development of marketing materials (brochures, flyers, emails, websites, etc) while adhering to accreditation standards as described in the handbook provided by A.S.P.E.N. Submit drafts of the materials to A.S.P.E.N. staff to review and provide guidance. • If desired, work with industry partners to obtain support for the program. Chapter leaders are responsible for securing their own industry support. A.S.P.E.N. staff will not assist with this process. • Obtain a LOA from all industry partners for support received. Submit completed and signed LOA to A.S.P.E.N. for final CEO signature. The LOA should be signed by the chapter president and the industry partner before final signature by the CEO is added. • Participate in conference calls to review rules for industry activities. • Speaker management as directed by A.S.P.E.N. and the speaker packet. • Collect slides from all speakers, ensure slides comply with the slide template. Planning committee members, EPD liaison and staff to review slides for any sign of commercial bias. • Facilitate slide presentation edits with speakers. • Create conference materials – at a minimum each attendee should receive a conference program which includes documentation of support

A.S.P.E.N. RESPONSIBILITIES	REQUESTING ORGANIZATION RESPONSIBILITIES
the event if no exhibit hall will exist. • Maintain files and copies of all event documentation such as LOA's, marketing materials, presentations, meeting minutes, etc.	received, a description of the program with the sessions and speakers listed, CE information, speaker and planning committee disclosure information. Final packet must be approved by A.S.P.E.N. at least 30 days prior to the event. • Provision of presentation slides to attendees is not required. However, the chapter should maintain a copy of the slides to submit to A.S.P.E.N. for documentation for accreditation purposes • If presentation slides are not provided to attendees, recommend providing the outlines speakers complete to attendees. • Submit edits to event evaluation to A.S.P.E.N. • Pay A.S.P.E.N. the balance of the joint providership fee.
Upon completion of the event • Assist chapter event attendees in completing evaluations and claiming of CE credit. • Put onsite registrants into the database and allow for claiming of CE credit. • Provide chapter with event evaluation summaries once CE system closes. • Once final paperwork is received, release conference registration fees collected via online registration to the chapter, less the credit card fees. Provide a documented financial statement with the check. • A.S.P.E.N. submits all reports to the accreditation boards. • A.S.P.E.N. maintains all accreditation files for each activity in A.S.P.E.N. records for at least seven years.	**Upon completion of the event** • Submit final paperwork to A.S.P.E.N. within 30 days of completion of the event. This includes but is not limited to full attendee registration list, information for onsite registrants, copies of all planning meeting minutes, speaker presentations, financial/budget documentation, etc. • Submit final event expense report within 60 days of completion of the event. • Provide A.S.P.E.N. with any additional documentation to maintain accurate files of the event from planning through implementation. *Failure to comply with post event documentation will result in chapter event fees being withheld and may compromise the ability of the chapter to partner with A.S.P.E.N. in the future.*

VI. Primer on Program Development

A. Joint providership Policy and Procedures

The information in this section is designed to provide chapters with information on planning and implementing a successful and compliant interdisciplinary educational program for CE credit.

A.S.P.E.N. is accredited as a provider of educational activities, not an approver of others' programs. This means that when A.S.P.E.N. and a chapter enter into the joint providership arrangement, that A.S.P.E.N. must become an integral part of the planning process from the beginning. This is the only way A.S.P.E.N. can be of any assistance in providing CE credit for chapter events. A.S.P.E.N. takes the responsibilities to the accrediting organizations quite seriously, and will not compromise the ability to directly provide education by knowingly trying to by-pass the regulations under which our provider accreditations were granted. In the event the appropriate steps are not adhered to, the joint providership relationship may be compromised.

A.S.P.E.N. maintains the following accreditation:

- Dietitians through the Commission on Dietetic Registration (CDR), provider #AM005
- Nurses through the American Nurses Credentialing Center (ANCC) and the California Board of Registered Nursing, CEP 3971
- Pharmacists through the Accreditation Council for Pharmacy Education (ACPE)
- Physicians through the Accreditation Council for Continuing Medical Education (ACCME)

Each organization emphasizes slightly different aspects of the process of planning, developing, documenting and evaluating continuing education activities. To provide CE credit to all four disciplines, A.S.P.E.N. has merged these four sets of criteria/requirements into a useable system. The results are somewhat daunting. The attempt is to make the process as clear and easy as possible.

Definitions

Joint providership

ANCC: Planning, developing and implementing an educational activity by two or more organizations or agencies. The joint providership organization may not be a commercial interest or sponsor.

ACPE: ACPE accredited providers that collaborate on content development with ACPE and/or non-ACPE accredited providers are engaging in joint providership. ACPE expects all CPE activities to be in compliance with the Accreditation Standards for Continuing Pharmacy Education. It is the accredited provider's responsibility to demonstrate to ACPE compliance through written documentation.

ACCME*:* an activity that is planned, implemented and evaluated by the accredited provider and a non-accredited entity. The accredited provider must take responsibility for an activity when it is presented in cooperation with a nonaccredited organization and must use the appropriate accreditation statement.

Policy Statements

1. Joint provider is a professional and/or scientific organization or educational institution or A.S.P.E.N. Chapter.

2. Joint provider cannot be a commercial interest or sponsor.
3. Proposed education program is not in conflict with another A.S.P.E.N. educational activity.
4. Members of the EPD Committee are involved in the planning, development, implementation and evaluation of the program. A.S.P.E.N. maintains control of the program objectives and content, selection of presenters, awarding of contact hours, record keeping.
5. The EPD Committee has final approval authority over all aspects of the program.
6. The program budget and financial arrangements are understood and agreed upon prior to entry into the formal agreement for the joint providership
7. A minimum of 2 credit hours must be offered for the program.
8. Program planning, administration, and record-keeping meet continuing education credit requirements for all disciplines of the target audience for the program.
9. A Letter of Agreement (LOA), which clearly outlines the responsibilities of each party, along with financial arrangements must be completed at least six months in advance of the program
10. A.S.P.E.N. reserves the right to withdraw joint providership from an activity should the requesting organization not maintain their responsibilities as outlined in above mentioned LOA
11. A.S.P.E.N. will have an opportunity to provide Society information at the event.
12. A.S.P.E.N. reserves the right to modify the requirements of joint providership agreement based on revisions to policies imposed by the accrediting bodies.

B. Elements of Interdisciplinary Continuing Education Program Development

This section contains elements of program development shared by all accrediting organizations (ACCME, ACPE, ANCC, and CDR).

Planning Process for Continuing Education Programs:

1. Select program committee. Committee should have representation from all disciplines. CVs and conflict of interest disclosure statements must be obtained from <u>all</u> committee members.

   <u>*SPECIAL REQUIREMENTS*</u> for any continuing education program that will (1) include registered nurses in the target audience and that will (2) have A.S.P.E.N. as the sponsor for continuing education credit

   - A minimum of a Nurse Planner (A.S.P.E.N. approved, advanced degree RN responsible for ensuring all ANCC COA criteria are used to plan and implement the activity) must be on the planning committee. A.S.P.E.N. has special conditions for the Nurse Planner.
   - A representative from A.S.P.E.N.'s Education and Professional Development Committee must be included on the committee. This individual will be appointed by A.S.P.E.N.

   Note: communication among committee members may occur in person, by phone, email, fax, etc. KEEP PROOF OF ALL COMMITTEE WORK. Document qualifications of committee members to direct the program (the documentation of these qualifications can be the CV).

2. Obtain a list of educational needs by doing needs assessment. <u>***Document***</u> your process. How did you get the idea that anyone would benefit from taking your proposed program?

   Accreditation requires that you identify and DOCUMENT (via emails/letters/copies of questionnaires/article copies/audit results, etc) the **process** and **sources** you use to determine that any given educational program will benefit participants and their patients. Here is a summary of some potential sources of needs-assessment data.

SOME NEEDS ASSESSMENT SOURCES & TECHNIQUES

- Periodic surveys /questionnaires of target audience
- Use of advisory/planning committee that includes target audience members
- Topics suggested by participants in evaluations from previous programs
- Observation of inter-disciplinary processes that may need refinement / education
- Audits of professional practice to ID areas in need of strengthening
- Information supplied by accreditation organizations
- Problems / issues related to practice
- General professional issues
- Governmental policies affecting practice
- Future trends –research results in practice area
- Documented (by you) discussion groups
- Analysis of patient population / patient care requirements
- Review of professional literature (such as "Issues in Nursing" on ANCC website). Clinical trends, future developmental needs, predictions about health care, social and population trends
- Informal requests – put them in writing please.
- Hospital / Organization Committee Meeting minutes such as CPR, Infection Control, Risk Management, Patient Care,
- Interdisciplinary Nutrition Support Teams.
- Quality Assurance and professional AUDIT findings.
- Statistics on patient outcomes
- Patient responses/evaluations.
- Suggestions from supervisory, professional and administrative personnel
- Meetings with educators re areas requiring clarification, higher level practice info
- Meet / discuss needs with other similar organizations that have a similar target audience
- Popular listserv topic discussions that identify practice gaps.
- Summary of performance evaluations for common educational needs.
- **YOUR INGENIOUS NEEDS ASSESSMENT SOURCES GO HERE***

3. Analyze needs to determine topics, difficulty level, best educational methods, etc.
    a. Topic selection has documented needs assessment data as noted above
    The necessity for education on a specific topic identified by a gap in professional practice.

    b. Topic selected has an identified practice gap
    A professional practice gap is defined as a gap between what the professional is doing compared to what is achievable on the basis of current knowledge. Basically, what do

you want participants to do that they are not currently doing? Gaps can be in knowledge, competence, performance, or patient outcomes and should be measurable in some way.

- Knowledge: presence of experience
- Competence: knowing how to apply knowledge to practice
- Performance: doing it
- Patient Outcome: measuring patient records against the new knowledge

4. Identify target audience.
    a. Can you profile the professionals who will benefit from taking your proposed educational program, or who do you wish to attract to a program? Estimate attendance by discipline.

    b. Accreditation standards require you to identify the people you will be trying to serve by providing educational programs. As A.S.P.E.N. is a specialty society, we tend to provide advanced programs aimed at degreed/registered professionals in multiple disciplines who have strong interest in or specialize in nutrition support/clinical nutrition and metabolism. At times, we have sought newcomers by offering basic courses in nutrition support. Those courses had to be identified and marketed as being specifically for beginners in nutrition support. Several disciplines indicate that all courses must be above/beyond the coursework required for professional registration or basic degree.

    c. Define whom you wish to serve. Advanced practice vs. beginner? Specialty vs. general? Other? These will be the professionals whose needs you will assess to determine program goal/objectives/topics.

5. Set overall program goal and objectives, i.e., link identified needs to desired results and program type

    a. Accreditation criteria require that an overall Program GOAL and specific OBJECTIVES be stated. Additionally, every speaker/presenter must provide specific learning objectives for their presentations that support the overall program GOAL.

    b. GOAL: statement of intent that describes how the activity will enrich the practitioner's contributions to quality health care and/or the pursuit of professional career goals. The goal should support your organization's mission statement.

    c. OBJECTIVES: define the expected outcome of the activity and support the GOAL. What can the LEARNER expect to know or do as a result of completing the activity? Objectives developed as a result of the needs assessment data and are written in behavioral terminology and suggest outcome measures of activity success or effectiveness.

    d. OVERALL PROGRAM GOAL / OBJECTIVES: Develop these early! They will be used in promotion, instructional materials, and assessment and evaluation tools.

e. Special note for education programs for pharmacists that also applies across the board to all disciplines: Goal/objectives must relate to content that is appropriate for a pharmacist, appropriate for the activity type (knowledge, application or practice) for what a pharmacist will be able to do at the end of the activity.
   - Knowledge-based CPE activity: These CPE activities are primarily constructed to transmit knowledge (i.e., facts). The facts must be based on evidence as accepted in the literature by the health care professions.
   - Application-based CPE activity. These CPE activities are primarily constructed to apply the information learned in the time frame allotted. The information must be based on evidence as accepted in the literature by the health care professions.
   - Practice-based CPE activity. [Previously named Certificate Programs in Pharmacy] These CPE activities are primarily constructed to instill, expand, or enhance practice competencies through the systematic achievement of specified knowledge, skills, attitudes, and performance behaviors. The information within the practice-based CPE activity must be based on evidence as accepted in the literature by the health care professions. The formats of these CPE activities should include a didactic component and a practice experience component. The provider should employ an instructional design that is rationally sequenced, curricular based, and supportive of achievement of the stated professional competencies.

6. Develop your time sequence and program schedule.

7. Establish a budget (if not already done).

8. Select location and date(s).

   Common sense prevails in this criterion. Make sure suitable equipment is available (projection system, audio, demonstration equipment, etc.) And, make sure your participants are comfortable (adequate space, climate control, rest rooms, water). One note: if a demonstration is to be done, figure out how everyone will be able to see it, and some constructive time-occupier to keep busy those not actively involved in observation. You need to document these plans.

9. Decide whether to obtain commercial financial support.
   (<u>Contract from A.S.P.E.N. is required if outside contributions are accepted)</u>

10. Fees for program and CE credit

11. Policies (refunds, cancellation, grievance, deadlines, Americans with Disabilities Act)

12. Establish criteria for faculty selection.
    You must document criteria used to select faculty. The accreditation requirements for presenters and their teaching strategies, methods and materials are summarized below:

    <u>FACULTY SELECTION CRITERIA</u>
    - Competent/expert in subject matter (OBTAIN CV – IT IS REQUIRED!)

- Demonstrated comfort with teaching methodology/highly regarded teaching ability/skilled in instruction for adults
- Demonstrated familiarity with target audience and ability to meet the needs of the learners
- Provides balanced discussion with NO COMMERCIAL BIAS. (Sensitive to CE regulations on commercial bias.) NO mention of specific products may be made (use product categories)
- Uses instructional methods appropriate to topic, i.e. congruent with the objectives and content. Example: if discussing a psychomotor process, demonstration and return demonstration are appropriate instructional methods. (*Aware of appropriate instructional tools)*
- Uses instructional methods approved for adult learning such as collaboration for problem solving, discussion groups, and case studies. *(Skilled in using adult learning techniques)*
- Uses scientific principles and current information with references/bibliography *(High level of scientific integrity)*

FACULTY REQUIREMENTS

- Faculty disclosures of commercial relationships are **mandatory**. (Reference this document's section on Non-commercialism and attached disclosure documents)
- Faculty must disclose discussion of off-label usage and limitations on information including ongoing research, preliminary data, unsupported opinion, or not the ONLY opinion.
- Instructional materials are timely, CURRENT and medically sound.
- Summary/outline of presentation, along with Goal and specific learning objectives, references / bibliography, post-presentation test questions, case study, problem solving activity are provided for inclusion in Syllabus.
- Presenters involve participants in interactive learning as a method of solidifying data presented and confirming that objectives have been met. How? Use of case studies, problem solving, simulation exercises, structured question / answer sessions, group discussion, creation of an action plan, panel discussions. Open floor for interactive discussion. Leave time for questions and completion of program evaluation form.
- Learning preferences of target audience are considered by presenter when selecting delivery method to be used.
    - Presenters take an active role in development of presentation – document this. (objectives, outline, post-presentation activities, determination of TIME needed to attain objectives)

NOTE: Encourage the presenter to include information on how the data can be applied to participants' practice while also identifying areas for future research. In other words – se the challenge for the members of the target audience.

13. Develop marketing strategies, timing and materials.
    a. Program announcement literature will meet all ACPE guidelines, ACCME guidelines, ANCC guidelines, CDR guidelines, and California Board of Nursing Guidelines and will include the following information:

    IMPORTANT NOTE: ACPE requires that all of the following information be available before you begin taking registrations for your activity.

a. Adequate advanced information must be provided to prospective participants to enable them to be well-informed consumers of CE programs**.** **REQUIRED ELEMENTS** for all brochures/ads/memos/invitations/announcements/Syllabi/web postings/etc.

b. MANDATORY CRITERIA FOR WRITTEN MATERIALS

- Educational purpose, goals and specific learning
  - Note: if you have a topic where there are multiple speakers, you may provide an overall goal and program objectives in your promotional material rather than goal/objectives for every speaker's individual presentation. HOWEVER, the Syllabus does need learning objectives for each presentation.
- Target audience: individuals who will benefit from taking the program
- Faculty members, credentials/degrees, title/position, and disclosure information (or notice of how disclosure data will be provided). At a minimum, disclosure information must be provided in program syllabus.
- Fees for the program stating what is and is not covered by the fee. Deadlines for registration, cancellations and fee refunds.
- Schedule of educational activities.
- The amount of continuing education credit, specified in CME, contact hours, CEUs, and CPEUs that can be earned through participation and successful completion of the program.
- The official logo of each accrediting organization is used as appropriate in conjunction with the official statement identifying the approved provider(s) sponsoring or cosponsoring the program. A.S.P.E.N. will provide these statements to be used.
- For ACPE, the Universal Activity Number (UAN) assigned to the program with the pharmacy designee
- For ACPE, the type of activity being provided: knowledge, application, or practice.
- For CDR, the learning level (1,2,3) assigned to the program.
- Description of requirements established for successful completion of the continuing education program and subsequent awarding of credit.
- Acknowledgement of outside organization(s) providing financial support will be included, but will not be product specific. When acknowledging in the syllabus, must be at the front of the syllabus.
- The initial release date (or date of most recent review) and termination date for ongoing programs, and enduring or home study programs
- Internet based activities must include
  - Hardware requirements: minimum hardware requirements including the minimum memory, storage, processor speed and multimedia components required by the learner
  - Software requirements: minimum software requirements including the Internet Browser(s) and minimum version along with any Browser "plug –ins" that may be required.
  - Internet: internet and minimum connectivity speed that the learner must have
  - Provider contact information: the accredited provider must have a mechanism in place for the learner to be able to contact the

provider if there are questions about the internet continuing education activity
    - Policy on Privacy and Confidentiality: accredited provider must have , adhere to, and inform the learner about its policy on privacy and confidentiality that relates to the continuing education activities it provides on the internet.
    - Method of user participation in the learning process
- Americans with Disabilities Act Statement.
- Grievance Policy
- Statement that attendance at this event does not qualify the nurse attendee to alter their scope of practice.
- Statement that product endorsement does not exist
- Location of program (City/State)
- A.S.P.E.N. address / phone number /fax / website

Implementation

1. Select and contract with faculty (including disclosure, release forms, responsibilities, reimbursement policies).

2. Develop learner goal and objectives with faculty for each presentation.

   Objectives should be MEASURABLE i.e., identify observable actions (who will do what as measured by what and by when), and support the overall goal FROM THE STUDENT'S PERSPECTIVE. Here is a very handy list of words that are action oriented and useful for creation of objectives.

OBJECTIVES DEVELOPMENT

ACQUISITION OF KNOWLEDGE	ENHANCEMENT OF THINKING SKILLS	DEVELOPMENT OF PSYCHOMOTOR SKILLS	CHANGES IN ATTITUDES, VALUES, FEELINGS
identify	reflect	demonstrate	challenge
list	compare	produce	defend
define	contrast	assemble	judge
state	classify	install	accept
prepare	evaluate	operate	adopt
recall	forecast	detect	advocate
express	formulate	locate	bargain
categorize	investigate	isolate	cooperate
chart	modify	arrange	endorse
rank	organize	build	justify
distinguish	plan	conduct	persuade
explain	research	check	resolve
outline	study	manipulate	select
inform	translate	fix	dispute
label	differentiate	lay out	approve
specify	analyze	perform	choose

tell	compute	sort	feel
recite	devise	construct	care
choose	review	draw	express
name	write	solve	
trace	match	adjust	
select	answer		
construct			
find			

3. Determine content and bibliography with faculty.

CONTENT and SUBJECT MATTER

For Nurses:

- INSERVICE training is not considered continuing education.
- Content must directly relate to objectives and support overall activity goal. The speaker must provide an outline. Outline must correspond to each learning objective, be consistent with time allotted to meet objective, current and accurate, documented by references that are within 5 years of publication (unless needed for a specific purpose such as historical reference)
- Must be relevant to practice of nursing ABOVE the level required for licensure.

For Pharmacists:

- Subject matter must be pertinent to contemporary practice of pharmacy and well balanced. [Examples of BALANCED: Discuss groups of products that aim to treat the same disease. If more than one therapy is available, present them all. Different viewpoints / conflicting research? Present them.] Topics NOT exclusive to pharmacy must provide pharmacy examples, case studies of how data relates to pharmacy practice.
- An activity represents one subject or a group of closely related subjects. If differing subjects are presented, they will need new UAN numbers.

For Dietitians:

- Content must relate to the field of Nutrition and Dietetics.
- Must be above the level required for registration as a dietitian
- Integrate/apply principles from science of food, nutrition, management, biology, physiology, behavioral and social science to achieve & maintain optimal human health.
- *SPECIAL REQUIREMENT**: Identify CDR learning levels in all printed materials**:*
    - Level 1 = Assumes minimal knowledge of literature and professional practice in area covered.
    - Level 2 = Assumes general knowledge of literature and practice in the area covered.
    - Level 3 = Assumes thorough knowledge of literature and professional practice in area covered.

For Physicians:

- Content must be linked to needs assessment (DOCUMENTED)
- Objectives should strive to identify clinical practice changes that will occur as a result of attendance.

- Activity evaluation should reflect the participants' perception of success in achieving objectives (i.e. practice changes the participant foresees making as a result of attendance).

TIME FRAME

Nurses:

- Time frame is identified and documented. Can presenter cover the content effectively in the time provided? Document how long each topic will need to convey enough information to achieve the objective.

Pharmacists:

- Use elements such as nature of topic and desire for balanced presentation to determine number of faculty needed and program duration.

4. Determine CDR difficulty level (1-3) as listed above and ACPE content category (1 to 5) as described below. A.S.P.E.N. typically assigns the ACPE content category when developing the UAN, but does welcome input from planning committee members as the program is being developed.

   01 - Disease State Management/Drug therapy
   02 - AIDS therapy
   03 - Law (related to pharmacy practice)
   04 - General Pharmacy
   05 - Patient Safety

5. Select teaching strategies and learning activities.

6. Select resources (audio-visual, handouts, reference lists).

7. Successful completion of the program is defined as participation in the education activity claimed for credit and completion of the activity and program evaluation in A.S.P.E.N.'s eLearning Center. This is the general practice A.S.P.E.N. follows, however there are alternative ways to determine successful completion that can be implemented. This information must be included in the syllabus and printed matter from the time registration is allowed.

   EXAMPLES OF ALTERNATIVE WAYS TO DEFINE SUCCESSFUL COMPLETION

   - Attendance at the entire activity –self reported or documented by electronics or sign in roster AND…
     Adequately completed evaluation forms (indicating discipline)
   - *ACPE Preferred:* Written test for Pharmacists, the test would have to be graded, and results equal a pre-determined level of achievement of objectives to qualify for continuing education credit. Minimally, have questions available in syllabus; require completion of evaluation form.
   - Return demonstration (when appropriate)

   Document how you verify attendance

   - Roll call or check-off attendance roster
   - Sign in log
   - Self-reported attendance

8. Establish proposed contact hours and assign ACPE UANs to the program. A.S.P.E.N. will assign UAN, however committee planners should determine the schedule from which contact hours can be determined.

9. Build the event, evaluations and CE certificates in A.S.P.E.N.'s eLearning Center. A.S.P.E.N. staff will do this and utilize the standard evaluation, however if there are specific questions you want included, those should be provided to A.S.P.E.N.

   IMPORTANT NOTE: Evaluation questions are worded to prove/disprove activity effectiveness in meeting the original educational needs, as stated in the GOAL and objectives. Tracking and measuring the process of converting educational needs into (measurable) program outcomes is ultimately the job of the program evaluations.

   a. EVALUATION CRITERIA – summary of requirements from all disciplines and the reason why A.S.P.E.N. evaluations are so long.
      - Overall satisfaction: achievement of personal goals and objectives (Did the program meet professional education needs?)
      - Did the objectives support the overall activity goal (which should be related to the original needs assessment results).
      - Did the participant achieve each/every stated objective? If not, comments would be appropriate. (I.e., not enough time dedicated to objectives, data missing?)
      - Opinion of instructors: Suitable instructional material, pacing of presentation, knowledge of /expertise in subject matter, clarity, effective use of time, responsive to questions. Provision of accurate and current data (generally within 5 years of publication).
      - Did the teaching strategies & techniques involve the learner and appropriately reflect the requirements dictated by the content
      - Opinion of topic: appropriate level of difficulty, relevant to practice, current, balanced
      - HOW will the information be used in the participant's practice?
      - Quality of Syllabus and other program materials.
      - Perception of any commercial bias? Which presentation / what in particular?
      - Relationship of post-test questions to objectives
      - Opinion of facilities: convenience of location, appropriate environment, conducive to learning.
      - Opinion of administration of program: well planned and organized, adherence to schedule.

   b. INDIVIDUAL ACTIONS &FEEDBACK ON PROGRAM'S SUCCESS IN MEETING OBJECTIVES
      - As part of "successful completion" of the program, include the requirement for a written evaluation of the program by the participant, **particularly noting** program's success in meeting stated objectives, fulfilling the learning needs of the individual and what practice changes are likely.
      - Individual activity: creation of action plan, resolution of case study, questions to answer with adequate answers/ written discussion /explanation.
      - NOTE: Please allot some time between presentations for participants to complete evaluations, if only 2-4 minutes. This essential if you are providing computer and

internet access to attendees to complete the evaluations online during the event. If attendees are directed to complete on their own, then not essential.

c. CERTIFICATES
These are integrated into the eLearning Center and provided electronically after successful completion of the program. A.S.P.E.N. will create the certificates for each discipline.

10. Design /develop syllabus that includes program schedule, continuing education information, policies, program planning committee list with disclosure information, faculty list with disclosure information, overall and individual speaker's presentation goal, objectives, outlines/summaries, references/bibliography.

11. Learning/outcome assessment
    a. *LEARING ASSESSMENT:* a formal post -presentation mechanism to assess the participants' achievement of the program's learning objectives.
    b. *OUTCOME ASSESSMENT:* a post presentation mechanism to assess achievement of objectives stated as Outcomes. (Improved/changed practice / Improved patient outcomes)

    To what level did the participant achieve the Goal and Objectives of the program (behavioral change/ increased knowledge/improved skills)? The more thorough the measurement of this achievement, and the higher the participant rating, the closer we come to attaining excellence in our educational efforts. This is, however, one of the most difficult criteria to implement. It can mean everything from grading post-presentation tests and providing individualized feedback to each participant to contacting each attendee after the activity (6-12 months later) to ascertain if they have made changes in their practice as a result of our activity or if they have seen improved patient outcomes. Going even further, it might involve doing a 360-degree analysis – i.e. querying everyone who works "around " the participant to see if they observe process/policy or practice changes or improvement in patient outcomes.

Here are some of the ways you can show intent to assess learning:

c. POST-PRESENTATION QUESTIONS
- Include some time in your schedule for participants to complete post-presentation questions, and to participate in a group discussion of the correct answers. *Minimally, provide "test" Q&A for every presentation.*
- Have faculty submit learning assessment questions with their presentations for inclusion in the event handouts.
- NOTES:
    - Answers to post-presentation questions may NOT appear adjacent to questions. On another page, or perhaps following the bibliography, you may supply answer, rationale / written discussion in lieu of a group discussion.
    - Questions should emphasize integration and utilization of knowledge, not simply recall of data.

d. GROUP DISCUSSION AND CRITIQUE OF ANSWERS – DOCUMENT IN YOUR SYLLABUS.

- Group case study discussions
- Discussion of application of data to practice.
- Group problem -solving exercises.
- Creation of an action plan.
- Panel discussion or debates – opened for audience questions.
- Participation in documented evaluation discussion with presenter.
- *Minimally, an open Q&A period for each program segment*

C. Standards for Commercial Support

NON-COMMERCIALISM & PRESENTER DISCLOSURE OF RELATIONSHIPS

Compliance with non-commercialism criteria is essential. The ACCME adopted the Standards for Commercial Support (SCS) and both the ACPE and ANCC now follow them.

NON-COMMERCIALISM REQUIREMENTS

- CE activities may be supported by commercial sources, given appropriate contracts.
- Program sponsor must enforce disclosure, insure balance and scientific integrity.
- Contracts between accredited provider (A.S.P.E.N.) and commercial sponsor must be used. *NOTE: You must advise A.S.P.E.N. if you intend to seek commercial support for your educational activity.*
- Educational programs and materials (Syllabus) must be free of commercial promotion. If a specific product is required for the program, presenter must note if competing product exists. Preferably, signs will be made and placed at the site of the product stating "Use of specific products in this program does not suggest / imply endorsement by A.S.P.E.N. or any accrediting organization"
- Refusal of presenter to disclose is reason to withdraw the request to present.
- Faculty disclosure of relationships is mandatory, including statements that the faculty member has no disclosure. This information must be collected in advance and provided to attendees prior to the start of the education program.
- Commercial bias in presentations is not allowed.
- Faculty disclosure of off-label / investigational use of any product is disclosed and discussed. This includes disclosure of limitations on information: ongoing research, preliminary data, unsupported opinion, other opinions supported by research.
- If you accept commercial funding, you must rigorously keep financial records of how money was spent and be able to provide the organization and A.S.P.E.N. with a full accounting of fund use.
- Commercial funds may not be used in any way that would have the appearance of impropriety. They may not pay speakers directly. Ask A.S.P.E.N. if you have questions on this.
- Commercial products / promo may not be displayed in the same room nor outside of CE activities.
- Representatives of the company funding an event may not engage in sales activities during the event.

STANDARDS FOR COMMERCIAL SUPPORT (as published by the ACCME)

1. ACCME Standard 1. Independence.
    - 1.1 ACCME provider must ensure that the following decisions were made free of the control of a commercial interest. The ACCME defines a "Commercial interest" as any proprietary entity producing health care goods or services, with the exemption of non-profit or government organizations and non-health care related companies.
        - a. Identification of CME needs;
        - b. Determination of educational objectives;
        - c. Selection and presentation of content;
        - d. Selection of all persons and organizations that will be in a position to control the content of the CME;
        - e. Selection of educational methods;
        - f. Evaluation of the activity.

1.2 A commercial interest cannot take the role of non-accredited partner in a joint sponsorship relationship.

2. ACCME Standard 2: Resolution of personal conflicts of interests.

2.1 The provider must be able to show that everyone who is in a position to control the content of an education activity has disclosed all relevant financial relationships with any commercial interest to the provider. The ACCME defines "relevant" financial relationships as financial relationships in any amount occurring within the past 12 months that create a conflict of interest.

2.2 An individual who refuses to disclose relevant financial relationships will be disqualified from being a planning committee member, a teacher, or an author of CME, and cannot have control of, or responsibility for, the development, management, presentation or evaluation of the CME activity.

2.3 The provider must have implemented a mechanism to identify and resolve all conflicts of interest prior to the education activity being delivered to learners.

3. ACCME Standard 3: Appropriate use of commercial support.

3.1 The provider must make all decisions regarding the disposition and disbursement of commercial support.

3.2 A provider cannot be required by a commercial interest to accept advice or services concerning teachers, authors, or participants or other education matters, including content, from a commercial interest as conditions of contributing funds or services.

3.3 All commercial support associated with a CME activity must be given with the full knowledge and approval of the provider.

Written agreement documenting terms of support

3.4 The terms, conditions, and purposes of the commercial support must be documented in a written agreement between the commercial supporter that includes the provider and its educational partner(s). The agreement must include the provider, even if the support is given directly to the provider's educational partner or a joint sponsor.

3.5 The written agreement must specify the commercial interest that is the source of commercial support.

3.6 Both the commercial supporter and the provider must sign the written agreement between the commercial supporter and the provider.

Expenditures for an individual providing CME

3.7 The provider must have written policies and procedures governing honoraria and reimbursement of out-of-pocket expenses for planners, teachers and authors.

3.8 The provider, the joint sponsor, or designated educational partner must pay directly any teacher or author honoraria or reimbursement of out-of-pocket expenses in compliance with the provider's written policies and procedures.

3.9 No other payment shall be given to the director of the activity, planning committee members, teachers or authors, joint sponsor, or any others involved with the supported activity.

3.10 If teachers or authors are listed on the agenda as facilitating or conducting a presentation or session, but participate in the remainder of an educational event as a learner, their expenses can be reimbursed and honoraria can be paid for their teacher or author role only.

Expenditures for learners

3.11 Social events or meals at CME activities cannot compete with or take precedence over the educational events.

3.12 The provider may not use commercial support to pay for travel, lodging, honoraria, or personal expenses for non-teacher or non-author participants of a CME activity. The provider may use commercial support to pay for travel, lodging, honoraria, or person expenses for bona fide employees and volunteers of the provider, joint sponsor or educational partner.

Accountability

3.13 The provider must be able to produce accurate documentation detailing the receipt and expenditure of the commercial support.

4. ACCME Standard 4: Appropriate Management of Associated Commercial Promotion

4.1 Arrangements for commercial exhibits or advertisements cannot influence planning or interfere with the presentation, nor can they be a condition of the provision of commercial support for CME activities.

4.2 Product-promotion material or product-specific advertisement of any type is prohibited in or during CME activities. The juxtaposition of editorial and advertising material on the same products or subjects must be avoided. Live (Staffed exhibits, presentations) or enduring (printed or electronic advertisements) promotional activities must be kept separate from CME.

- For print, advertisements and promotional materials will not be interleafed within the pages of the CME content. Advertisements and promotional materials may face the first or last pages of printed CME content as long as these materials are not related to the CME content they face and are not paid for by the commercial supporters of the CME activity.
- For computer based, advertisements and promotional materials will not be visible on the screen at the same time as the CME content and not interleafed between computer “windows” or screens of the CME content.
- For audio and video recording, advertisements and promotional materials will not be included within the CME. There will be no “commercial breaks.”
- For live, face-to-face CME, advertisements and promotional materials cannot be displayed or distributed in the educational space immediately before, during, or after a CME activity. Providers cannot allow representatives of Commercial Interests to engage in sales or promotional activities while in the space or place of the CME activity.

4.3 Educational materials that are part of a CME activity, such as slides, abstracts and handouts, cannot contain any advertising, trade name or a product-group message.

4.4 Print or electronic information distributed about the non-CME elements of a CME activity that are not directly related to the transfer of education to the learner, such as schedules and content descriptions, may include product-promotion material or product-specific advertisement.

4.5 A provider cannot use a commercial interest as the agent providing a CME activity to learners, e.g., distribution of self-study CME activities or arranging for electronic access to CME activities.

5. ACCME Standard 5: Content and Format free of commercial bias.
   - 5.1 The content or format of a CME activity or its related materials must promote improvements or quality in healthcare and not a specific proprietary business interest of a commercial interest.
   - 5.2 Presentations must give a balanced view of therapeutic options. Use of generic names will contribute to this impartiality. If the CME educational material or content includes trade names, where available trade names from several companies should be used, not just trade names from a single company.
6. ACCME Standard 6: Disclosures Relevant to Potential Commercial Bias.

Relevant financial relationships of those with control over CME content

- 6.1 An individual must disclose to learners any relevant financial relationship(s), to include the following information:
  - Name of the individual;
  - Name of the commercial interest(s);
  - Nature of the relationship the person has with each commercial interest.
- 6.2 For an individual with no relevant financial relationship(s), the learners must be informed that no relevant financial relationship(s) exist.

Commercial support for the CME activity

- 6.3 The source of all support from commercial interests must be disclosed to learners. When commercial support is “in-kind”, the nature of the support must be disclosed to learners.
- 6.4 “Disclosure” must never include the use of a trade name or a product-group message.

Timing of disclosure

- 6.5 A provider must disclose the above information to learners prior to the beginning of the educational activity. .

These policies and definitions supplement the 2004 updated ACCME Standards for Commercial SupportSM: Standards to Ensure the Independence of CME Activities ("SCS").

Relevant to SCS1 (Ensuring Independence in Planning CME Activities):

A ‘commercial interest’ is any entity producing, marketing, re-selling, or distributing health care goods or services consumed by, or used on, patients. The ACCME does not consider providers of clinical service directly to patients to be commercial interests.

A commercial interest is not eligible for ACCME accreditation. Within the context of this definition and limitation, the ACCME considers the following types of organizations to be eligible for accreditation and free to control the content of CME:

- 501-C Non-profit organizations (Note, ACCME screens 501c organizations for eligibility. Those that advocate for ‘commercial interests’ as a 501c organization are not eligible for accreditation in the ACCME system. They cannot serve in the role of joint sponsor, but they can be a commercial supporter.)
- Government organizations
- Non-health care related companies
- Liability insurance providers
- Health insurance providers
- Group medical practices
- For-profit hospitals

- For profit rehabilitation centers
- For-profit nursing homes

ACCME reserves the right to modify this definition and this list of eligible organizations from time to time without notice.

ACCME's Definition of a Commercial Interest as It Relates to Joint Sponsorship

In August 2007, the ACCME modified its definition of a "commercial interest." As has been the case since 2004, commercial interests cannot be accredited providers and cannot be "joint sponsors."

In joint sponsorship, either the accredited provider or its non-accredited joint sponsor can have control of identification of CME needs, determination of educational objectives, selection and presentation of content, selection of all persons and organizations that will be in a position to control the content of the CME, selection of educational methods, and evaluation of the activity. To maintain CME as independent from commercial interests, control of identification of CME needs, determination of educational objectives, selection and presentation of content, selection of all persons and organizations that will be in a position to control the content of the CME, selection of educational methods, and evaluation of the activity cannot be in the hands of a commercial interest.

The ACCME's deadline of August 2009 is the date by which ACCME will hold accredited providers accountable to the August 2007 revised definition of commercial interests. The ACCME has given accredited providers that might be affected by the revised definition of commercial interest these two years (August 2009) to modify their corporate structures so that the CME component of their organization will be an independent entity.

This timeline would also apply for organizations involved in joint sponsorship. After August 2009, accredited providers will not be able to work in joint sponsorship with non-accredited providers that produce, market, re-sell, or distribute health care goods or services consumed by, or used on, patients.

If an accredited provider has questions related to its own corporate structure or that of a joint sponsor in the context of the definition of commercial interest, please contact the ACCME at mkopelowmd@accme.org.

Non-accredited providers wanting clarification of their status or eligibility as joint sponsors can also contact ACCME at postmaster@accme.org for information in this regard.

For additional information about types of organizations that are eligible for ACCME accreditation, see: Determining Your Eligibility for Accreditation.

Relevant to SCS2 (Identifying and Resolving Conflicts of Interest):

Financial Relationships: Financial relationships are those relationships in which the individual benefits by receiving a salary, royalty, intellectual property rights, consulting fee, honoraria, ownership interest (e.g., stocks, stock options or other ownership interest, excluding diversified mutual funds), or other financial benefit. Financial benefits are usually associated with roles such as employment, management position, independent contractor (including contracted research), consulting, speaking and teaching, membership on advisory committees or review panels, board membership, and other activities from which remuneration is received, or expected. ACCME considers relationships of the person involved in the CME activity to include financial relationships of a spouse or partner. **(added March 2005)**

With respect to personal **financial relationships**, 'contracted research' includes research funding where the institution gets the grant and manages the funds and the person is the principal or named investigator on the grant. **(added November 2004)**

Conflict of Interest: Circumstances create a conflict of interest when an individual has an opportunity to affect CME content about products or services of a commercial interest with which he/she has a financial relationship. **(added March 2005)**

The ACCME considers **financial relationships** to create actual conflicts of interest in CME when individuals have both a financial relationship with a commercial interest and the opportunity to affect the content of CME about the products or services of that commercial interest. The ACCME considers “content of CME about the products or services of that commercial interest” to include content about specific agents/devices, but not necessarily about the class of agents/devices, and not necessarily content about the whole disease class in which those agents/devises are used. **(added November 2004)**

With respect to **financial relationships** with commercial interests, when a person divests themselves of a relationship it is immediately not relevant to conflicts of interest but it must be disclosed to the learners for 12 months. **(added November 2004)**

<u>Relevant to SCS3 (Appropriate Use of Commercial Support)</u>

Commercial Support is financial, or in-kind, contributions given by a commercial interest (see Policies relevant to SCS1), which is used to pay all or part of the costs of a CME activity.

An accredited provider can fulfill the expectations of SCS 3.4-3.6 by adopting a previously executed agreement between an accredited provider and a commercial supporter and indicating in writing their acceptance of the terms and conditions specified and the amount of commercial support they will receive. (Effective immediately.)

A provider will be found in Noncompliance with SCS 1.1 and SCS 3.2 if the provider enters into a commercial support agreement where the commercial supporter specifies the manner in which the provider will fulfill the requirements of the ACCME’s Elements, Policies and Standards. (Effective January 1, 2008.)

Element 3.12 of the ACCME’s Updated Standards for Commercial Support applies only to physicians whose official residence is in the United States. **(added November 2004)**

<u>Relevant to SCS4 (Appropriate Management of Commercial Promotion)</u>

Commercial exhibits and advertisements are promotional activities and not continuing medical education. Therefore, monies paid by commercial interests to providers for these promotional activities are not considered to be ‘commercial support’. However, accredited providers are expected to fulfill the requirements of SCS 4 and to use sound fiscal and business practices with respect to promotional activities.

<u>Relevant to SCS6 (Disclosure to Learners)</u>

Disclosure of information about provider and faculty relationships may be disclosed verbally to participants at a CME activity. When such information is disclosed verbally at a CME activity, providers must be able to supply ACCME with written verification that appropriate verbal disclosure occurred at the activity. With respect to this written verification:

1. A representative of the provider who was in attendance at the time of the verbal disclosure must attest, in writing:

   a) that verbal disclosure did occur; and

   b) itemize the content of the disclosed information (SCS 6.1); or that there was nothing to disclose (SCS 6.2).

2. The documentation that verifies that adequate verbal disclosure did occur must be completed within one month of the activity.

The provider’s acknowledgment of commercial support as required by SCS 6.3 and 6.4 may state the name, mission, and areas of clinical involvement of the company or institution and may include corporate logos and slogans, if they are not product promotional in nature.

VII. Joint Providership of Education Activity Checklists

A. Development
B. Implementation from the responsibilities chart
C. Post Event and record keeping requirements
D. Program Materials Checklist of Required Items
   (Promotional Material and Syllabus)

CHECKLISTS FOR JOINT PROVIDERSHIP of EDUCATION ACTIVITY

The following checklists and forms are your guides to accreditation compliance for education activities that are jointly provided by A.S.P.E.N. Primary checklist may reference second-level checklist or specific forms for specific tasks such as syllabus production. PLEASE help us keep our accreditation status by fulfilling your contractual obligations. The Chapter CE Handbook has a wealth of information for you to ensure compliance.

I. Development Phase

√	*TASK*
	Form an interdisciplinary planning committee including at least one dietitian, nurse, pharmacist and physician ❑ Collect contact information, disclosures and CVs ❑ Save all planning committee meeting minutes
	Submit a letter of intent to apply for joint providership. Minimum requirements ❑ Name and mission of requesting organization ❑ Description of the program including anticipated date, time and location of the event ❑ Names and contact information for planning committee members ❑ Conflict of interest disclosure statements for each planning committee member ❑ Preliminary program budget including projected revenue and expenses ❑ Submit by predetermined deadline based on timing of the event ❑ There should be no discussions with industry about the event and planned content
	Continue event planning ❑ Include A.S.P.E.N. liaison on the event planning communications – this is a member of the A.S.P.E.N. Education and Professional Development (EPD) Committee ❑ As a committee, conduct the needs assessment and complete a practice gap analysis. Document all. ❑ Develop event goals and objectives ❑ Plan the event ❑ Select and invite faculty ❑ All planning work should be documented (including minutes) and maintained in files for later submission to A.S.P.E.N.
	Submit your proposed program to A.S.P.E.N. for review by the Education & Professional Development (EPD) Committee according to appropriate deadline ❑ Complete the Chapter Proposal for Education Activity Form in its entirety ❑ Include CVs for speakers and planning committee members. Ensure proper speaker selection practices were adhered to – refer to handbook ❑ Include conflict of interest disclosure statements for all speakers and planning committee members (if changes based on what was submitted in letter of intent)
	Upon agreement by the committee to jointly sponsor the proposed educational activity, ❑ Sign your **contract** with A.S.P.E.N. and return it to the national office.
	Submit deposit of $250 with the signed LOA
	Event Logistics

	❑ Create a pricing structure for the event – include member and nonmember fee structure. Submit to A.S.P.E.N. with detailed event description for creation of the event to accept registration ❑ Create a refund policy to be adhered to by chapter leaders and A.S.P.E.N. staff ❑ Develop marketing materials (brochures, flyers, emails, websites, etc.) while adhering to the accreditation standards described in the handbook. (See additional program materials check list) ❑ Submit all marketing materials to A.S.P.E.N. staff for review before sending out or publishing ❑ As desired, work with industry partners to obtain support for the program. A.S.P.E.N. does not secure industry support for chapter events ❑ Obtain LOA from all industry partners and submit to A.S.P.E.N. for CEO or COO signature once signed by chapter president and industry partner
	Speaker Management ❑ Obtain speaker release ❑ Obtain speaker disclosure information (if changes to what was submitted with proposal) ❑ Obtain speaker CV (if changes to what was submitted with proposal) ❑ Obtain signed speaker contract ❑ Provide speaker contract that specifies reimbursement policy, honorarium (if used). Provide instructions that define desired teaching methods such as active participation in the learning – presentation level & target audience – topic and time restrictions - requirements/deadlines for submission of syllabus and presentation materials (including presentation objectives, outline or summary, reference list, self-assessment questions/answers or case study, PowerPoint slides) ❑ Collect slides from speakers review for formatting and inclusion of commercial bias (planning committee members and staff to review. A.S.P.E.N. will need a final copy of the presentations whether or not they are provided to attendees) ❑ Facilitate presentation slide edits with speakers
	Develop Event Materials – minimum is a conference program ❑ Refer to syllabus check list for details ❑ Provision of copies of slides to attendees is not required ❑ Submit syllabus to A.S.P.E.N. **30 days prior to the event** for review ❑ Submit edits to event evaluation to A.S.P.E.N. **60 days prior to event** ❑ Submit post test questions, if desired ❑ Pay balance of joint providership fee to A.S.P.E.N. 6 months prior to the event
	Keep **minutes of planning committee** meetings, emails, and other documentation of the planning process and submit to A.S.P.E.N.
	Finalize **time schedule** – submit to A.S.P.E.N.
	Estimate audience size, insure **facilities** will accommodate attendees
	Design Audio/Video set up

II. Implementation Phase: on site management

√	***TASK***
	Ensure comfortable learning environment for attendees.
	Ensure that NO promotional activity occurs in the same room as the educational activity.
	If a commercial product must be used in a presentation (as for an equipment demonstration), place a sign near the equipment that says “ Presence of this (PRODUCT) does not imply endorsement by any accrediting organization”. Document this sign.

	Provide sign in sheets or check off pre-registration list INCLUDING discipline of each attendee (REQUIRED!). Account for on-site registrations as well.
	Distribute Course Syllabi

II. Post Program Requirements

√	*TASK*
	Submit to A.S.P.E.N. the registration forms and payment for onsite registrations. Should be done immediately after the event.
	Submit the following to A.S.P.E.N. 30-45 days post event ❑ Income and expense statement (budget vs. actual) ❑ Attendance roster per discipline as compared to registration numbers ❑ Copies of all files pertaining to program development, marketing, execution and follow up. ❑ **If not previously submitted:** Faculty disclosure forms, contracts, release (if applicable), CVs. Committee minutes Final Syllabus with program outline Final presentation slides from speakers Commercial support contracts – signed. Resolution of any conflict of interest for speakers and planning committee members

Program Materials Checklist of Required Items

√ OK	SYLLABUS	√ OK	PROMOMOTIONAL MATERIAL	ITEM
	Yes		Yes	Education purpose, goals and learning objectives for the event
	Yes		Yes	Target Audience
	Details below		Yes	Faculty members, credentials/degrees
	Yes		Optional expansion of faculty info	Faculty members, credentials/degrees, title/position, institution and state
	Yes		Note ⇨	Faculty and planning committee member Disclosure Information (for Promomotional materials, you may state how audience will receive disclosure & what info.) Disclosure information should be at the front of the syallbus.
	No		Yes	Fees and a clear statement of items that are or are not covered by those fees, as well as deadlines and cancellation policy.
	No		Yes	Refund information (including no refund if applicable)
	Yes		Yes	Schedule of educational activities (begin & end times)
	Yes		Yes	The amount of continuing education credit, specified in CME, contact hours, CEUs, and CPEUs that can be earned through participation and successful completion of the program.
	Yes		Yes	The official logo of each accrediting organization is used as appropriate in conjunction with the official statement identifying the approved provider(s) sponsoring or co-sponsoring the program. (A.S.P.E.N. will provide) • ACPE (logo and UAN numbers and activity type) • ANCC COA (logo) and statement "Attendance at this activity does not qualify nurses to alter their scope of practice", statement that product endorsement on behalf of A.S.P.E.N. does not exist • ACCME joint-sponsor statement and PRA notice. • CDR logo & difficulty level 1, 2 or 3.
	Yes		Yes	Americans with Disabilities Act statement
	Yes		No	Policy on grievances

√ OK	SYLLABUS	√ OK	PROMOMOTIONAL MATERIAL	ITEM
	Yes		Yes	Define successful completion (Requirements to receive credit) i.e. attend in full, complete evaluation, take test…
	Yes		Yes if known	Acknowledgement of outside organization(s) providing financial support will be included, but will not be product specific. <u>MUST BE AT THE BEGINNING OF THE SYLLABUS</u>
	Yes		Yes	Educational activities distinguished from non-educational
	Yes		Yes	Release (Presentation) date and schedule. Expiration date if applicable
	Yes		No	Objectives for each presentation.
	Ideal to have		No	Self-Assessment exercises for <u>each presentation</u> i.e. solve case study, answer minimum of 3 questions.
	Yes		Yes	Computer requirements – hardware and software- when applicable
	Yes		Yes	Mechanism to reach the provider/provider contact information

VIII. Forms

A. Program Proposal form
B. Conflict of Interest Policy & Community Relationships Disclosure Form
C. Joint Providership Agreement form
D. Speaker confirmation letter
E. Speaker agreement and release forms
F. Speaker thank you letter
G. Speaker Guidelines
H. Moderator Guidelines
I. Travel expense voucher
J. Letter of Agreement for Contributed Funds
K. Program and Speaker Evaluation

LEADING THE SCIENCE AND PRACTICE OF CLINICAL NUTRITION
American Society for Parenteral and Enteral Nutrition

CHAPTER PROPOSAL FOR EDUCATION ACTIVITY:

PROPOSAL
A.S.P.E.N. Chapters in good standing are eligible to apply to enter into a joint providership relationship with A.S.P.E.N. to ensure continuing education (CE) credit is available to dietitians, nurses, pharmacists, and physicians for chapter events. Part of the process as outlined in the chapter CE handbook is the submission of a proposal for the education activity. Please complete the attached form and email it to Michelle Spangenburg, Director of Education and Research at michelles@nutritioncare.org according to the below timeline. All proposals are reviewed by A.S.P.E.N.'s Education and Professional Development (EPD) Committee, who then votes as to whether or not the program is accepted. Please note, credit is for all four disciplines, programs for individual disciplines will not be considered.

Letter of Intent Due on or Before	Proposal Due on or Before	Event Dates
February 1	May 1	January, February, March
May 1	August 1	April, May, June
August 1	November 1	July, August, September
November 1	February 1	October, November, December

GENERAL INFORMATION
A.S.P.E.N. prohibits programs that constitute commercial promotion. We support the *ACCME Standards for Commercial Support of Continuing Medical Education* in full. The standards for commercial support are located in the Chapter CE Handbook and on the ACCME website at http://www.accme.org/dir_docs/doc_upload/68b2902a-fb73-44d1-8725-80a1504e520c_uploaddocument.pdf.

Program Contact Responsibilities:
In your program proposal, you must identify an individual to serve as the program contact. This person is responsible for ensuring that program faculty submit materials in accordance with all deadlines, and will serve as the liaison between the A.S.P.E.N. EPD Committee, A.S.P.E.N. staff (national office), and the program faculty.

PROPOSAL REVIEW PROCESS
The EPD Committee will evaluate each proposal according to the following criteria:

- Educational value of the session
- Timeliness of topic
- Applicability of content to practice
- Expertise of suggested faculty
- Content that is free from commercial bias or promotion
- Appeal to a multidisciplinary audience
- Provision of multiple perspectives on a given topic
- Reflective of practice trends from around the country
- Ability of the session to meet a defined professional practice gap

All accepted proposals are subject to content revisions.

Questions?
Michelle Spangenburg MS, RD, Director of Education at michelles@aspen.nutr.org or 301-920-9127
Colleen Harper CAE, Director of Membership at colleen@aspen.nutr.org or 301-920-9130

Organization Name:		
Planning Committee Members (as submitted in letter of intent with any changes) – Names and Credentials. Please make note of any new planning committee members and include a conflict of interest disclosure statement for the new committee members with this proposal.		
PRIMARY CONTACT: *Name and Credentials*	Email	Work Affiliation
Conference/Meeting Date:		
Location:		
Proposed program length (hours) (program must be at least two hours in duration for consideration of the joint providership)		
Program title		
Program Description *(include an explanation of the program's purpose, why the program is unique and how the program relates to the identified learners' needs)*		
Presentation level: *basic, intermediate, advanced*		

Needs Assessment. *Please specify the sources used to determine the audience's need for this program. Examples include but are not limited to: survey of the target audience, published survey of target audience, epidemiological data, national clinical guidelines, ABMS/ACGME or IOM Competencies, Joint Commission Standards, expert panels, peer reviewed literature, etc. You may be asked to provide documentation of the identified need sources. Please refer to the Chapter CE Handbook for additional details.*

Professional Practice Gap: *A professional practice gap is defined as a gap between what the professional is doing compared to what is achievable on the basis of current knowledge. Basically, what do you want participants to do that they are not currently doing? Gaps can be in knowledge, competence, performance, or patient outcomes and should be measurable in some way.*

- *Knowledge: presence of experience*
- *Competence: knowing how to apply knowledge to practice*
- *Performance: doing it*
- *Patient Outcome: measuring patient records against the new knowledge*

For the program you are planning, please list the following:

1. **Identified gap**

2. **Educational Objectives (***List 3-5 learning objectives for the overall program. These objectives must relate to what attendees will accomplish towards closing the identified practice gap). Objectives should complete the following sentence "Upon conclusion of this program, the participant will be able to…". Please refer to the Chapter CE Handbook for information on writing objectives.*

3. **Expected outcome/desired result of providing the program**

4. **Content Focus** (select one)
   - Knowledge
   - Competence
   - Performance
   - Patient Outcome

Target Audience: *Based on the identified practice gap*

Session Format/Teaching Methods: *Identify the methods you intend to employ in this program to accomplish the objectives. Strive for more interactive teaching methods. How will you engage the audience in learning?*

- *Case presentations*
- *Debate*
- *Demonstration*
- *Laboratory work/findings*
- *Lecture*
- *Panel discussions*
- *Poster session*
- *Other, please describe*

Faculty and Presentation Topics/Titles: *A current CV of the faculty must also be provided*
Example of faculty listing: ***Jane Doe, MS, RD, RN, Director of Patient Care, University Hospital, Any City, State presenting on XYZ topic***

Will any non-educational strategies be employed during this session? If so, please describe.
Non-educational strategies are items that will be used to enhance the potential for learner change or to reinforce the desired results; such items may include patient education handouts, algorithms, etc.

Are there any barriers (potential or real) that face the target audience in overcoming the identified practice gap? If so, please describe.

If your target audience includes physicians, please read below and respond accordingly.
Physicians are an integral part of the multidisciplinary audience to whom A.S.P.E.N. provides education programs. Please address which competencies based on the Maintenance of Certification (MOC) competencies for physicians this program addresses:

- **Patient Care-**Provide care that is compassionate, appropriate and effective treatment for health problems and to promote health.

- **Medical Knowledge-**Demonstrate knowledge about established and evolving biomedical, clinical and cognate sciences and their application in patient care.

- **Interpersonal and Communication Skills-**Demonstrate skills that result in effective information exchange and teaming with patients, their families and professional associates (e.g. fostering a therapeutic relationship that is ethically sounds, uses effective listening skills with non-verbal and verbal communication; working as both a team member and at times as a leader).

- **Professionalism-**Demonstrate a commitment to carrying out professional responsibilities, adherence to ethical principles and sensitivity to diverse patient populations.

- **Systems-based Practice-**Demonstrate awareness of and responsibility to larger context and systems of healthcare. Be able to call on system resources to provide optimal care (e.g. coordinating care across sites or serving as the primary case manager when care involves multiple specialties, professions or sites).

- **Practice-based Learning and Improvement-**Able to investigate and evaluate their patient care practices, appraise and assimilate scientifi c evidence and improve their practice of medicine.

Education Design/Outcomes Evaluation

This program will be designed to change (please describe):

- Learner competence (changes in how to apply the knowledge to practice)
- Learner performance (changes in practice performance as a result of application of what was learned)
- Patient outcomes (changes in health status of patients due to changes in practice behavior)

Evaluation Methods What evaluation method (s) will you use to know if the activity was effective in addressing the identified gaps and assess the achievement of the desired level of outcome (s)? Please check all that apply. ▪ Audience response ▪ Post test ▪ Case discussions or vignettes ▪ Standard A.S.P.E.N. session, speaker, conference evaluations ▪ Other, please describe
Program Content Outline: Please provide an outline and the time allocated for each presentation
Commercial relationships for each member of the planning group and each speaker must also be provided. (if a disclosure was provided for the planning committee members with the letter of intent, then there is not a need to provide again, unless there are changes.) Failure to disclose will prevent a speaker from participating, no exceptions. Disclosure form is attached.
The Accreditation Council for Continuing Medical Education (ACCME) prohibits providers from asking commercial supporters to suggest topics or speakers for educational activities

Submit this proposal and the accompanying documents (speakers' CVs, speakers' and planning committee members' disclosures, etc.) together according to the appropriate deadline by email to: michelles@nutritioncare.org. **Incomplete submissions will not be considered.**

A.S.P.E.N. Conflict of Interest Policy – Chapter Events

A.S.P.E.N.'s educational mission is to impact patient wellness by providing evidence-based nutrition care information to health professionals. To assure credibility and effectiveness, we depend upon the continued participation of expert professionals in designing and presenting A.S.P.E.N.'s educational programs.

Background
A.S.P.E.N. provides continuing education to physicians, pharmacists, nurses and dietitians and is accredited by the Accreditation Council for Continuing Medical Education (ACCME), Accreditation Council for Pharmacy Education (ACPE), American Nurses Credentialing Center (ANCC) and the Commission on Dietetic Registration (CDR). A .S.P.E.N. adheres to the ACCME's Standards for Commercial Support to ensure that all educational programs are balanced, evidence-based, and free from commercial influence. In compliance with these requirements, A.S.P.E.N. must obtain disclosures of any relationships with commercial interests that are relevant to the content of the program from all participants in the educational process. This includes, but is not limited to organizers, moderators, and speakers. Failure to disclose any commercial relationships will disqualify you from taking part in the planning and implementation of the educational activity.

Based on your disclosures, you may be asked to assist in resolving any potential conflicts of interest. We request your patience and cooperation as we adhere to these required processes. All relevant disclosures will be published to assist participants in making informed learning decisions.

A.S.P.E.N. is honored to request your participation for our educational activity. We appreciate your additional compliance with the spirit of these guidelines. Thank you in advance for your cooperation. If you have any questions, please contact Carol Woodside, Component Relations Coordinator at 301-920-9146 or carolw@aspen.nutr.org

Faculty Conflict of Interest Policy

To maintain compliance and scientific integrity of our educational programs, all persons in a position to affect or control the content of an educational activity must adhere to the following.

1. Provide A.S.P.E.N. with information on relevant commercial relationships using the attached form. **A.S.P.E.N. may not confirm your participation prior to receiving this information, and resolving any perceived conflicts.**

2. Eliminate commercial bias. Whenever possible, classes or groups of similar products or treatment approaches should be discussed using generic rather than trade names. Varying or conflicting viewpoints should be explored.

3. Advertising may not be a part of educational materials or venue. Promotional activities may not occur during / in the space of an educational activity.

4. Recommendations for clinical practice will be supported by and will reference best-available evidence.

5. Scientific research used to support recommendations for clinical practice must conform to generally accepted standards of experimental design, data collection and analysis.

Commercial Relationships Disclosure Form – Chapter Events
A.S.P.E.N. Committees and Programs

Fax or Email Completed and Signed Form to Carol Woodside, Component Relations Coordinator at (Fax) 301-587-2365, or email carolw@aspen.nutr.org

Please Print Clearly

Name: ____

Circle one: **Board Member** **Committee Member** **Moderator** **Speaker**

Title of Education Program: ____

Date of Activity: ____

Policies

- ❑ I have read the Conflict of Interest policy, agree to abide by the stated terms and will not disclose any commercial bias during my presentation/talk.
- ❑ I am presenting a discussion of off-label use for a product regulated by the FDA, and will advise the participants.

Disclosure Process:

1. If, within the last 12 months, you or your spouse had a financial relationship with a commercial interest - any entity producing, marketing, re-selling, or distributing healthcare goods or services consumed by or used on patients, AND that relationship has the *potential* of influencing you regarding the development of educational content, you have a *potential* conflict of interest. This relationship is relevant and must be disclosed. For this purpose we consider the relevant financial relationships of your spouse or partner that you are aware of to be yours. Providers of clinical service directly to patients are not considered commercial interests. This includes: some 501c non-profit organizations, government organizations, non-healthcare related companies, liability insurance providers, group medical practices, for-profit hospitals, for-profit rehabilitation centers, for-profit nursing homes, blood banks, and diagnostic laboratories.

   If your topic is not related to products or services of a commercial entity with whom you have a relationship, nor could the relationship provide incentive for you to develop or present content that might benefit the value of that relationship, you are not required to disclose that relationship.

2. Describe what you or your spouse/partner received (ex: salary, honorarium etc). A.S.P.E.N. does NOT want to know amounts.
3. Describe your role

Commercial Interest	Nature of Relevant Commercial Relationship (Include all that apply)	
	What I received	**My Role**

❑ **I and/or my spouse or partner have no relationships with commercial interests to disclose**

❑ **I refuse to disclose, and understand that refusal will prevent my participation in this activity.**

Signature: ______________________________ **Date:** ____________________

What was received: Salary, royalty, intellectual property rights, consulting fee, honoraria, ownership interest (e.g., stocks, stock options or other ownership interest, excluding diversified mutual funds), or other financial benefit.

My Role(s): Employment, management position, independent contractor (including contracted research), consulting, speaking and teaching, membership on advisory committees or review panels, board membership, and other activities.

JOINT PROVIDERSHIP AGREEMENT FOR CONTINUING EDUCATION (CE)

This Joint Providership agreement is made by and between the _________ Chapter of A.S.P.E.N. (Joint Provider), a Chapter of A.S.P.E.N., having met all submission requirements for the proposed activity, and The American Society of Parenteral & Enteral Nutrition (A.S.P.E.N.), a non-profit corporation, and is effective as of (date)________________.

RECITALS

1. A.S.P.E.N. is a provider of continuing education accredited by the Accreditation Council for Continuing Medical Education (ACCME), American Nurses Credentialing Center Commission on Accreditation (ANCC/COA), the Accreditation Council for Pharmacy Education (ACPE), and The Commission on Dietetic Registration (CDR) and desires to enter into Joint Providership agreement with Joint Provider on the terms set forth herein.
2. A.S.P.E.N. is able and willing to jointly/co-sponsor/provide continuing education programs with other organizations.

TERMS OF AGREEMENT

1. **The Program:** The continuing education program to be sponsored by Joint Provider and A.S.P.E.N. is described as follows:

   A. Program Title:

   B. Date(s):

   C. Location(s):

   The A.S.P.E.N. Education and Professional Development Committee (EPD) is responsible for compliance with all accreditation criteria and standards and will be instrumental in the development and review of all continuing education program components including needs assessment, objectives, content, faculty, evaluation and logistics and will determine the amount of continuing education credit to be awarded. The EPD will make program alterations as required to comply with accreditation guidelines.

2. **Designated Contact Persons:**

   A. The designated contact from the Joint Provider for the program is:

   (Name, Title, and Address)

   B. The designated contact at A.S.P.E.N. for the joint providership program is:

   Michelle Spangenburg – Director of Education and Research
   8630 Fenton Street, Suite 412
   Silver Spring, MD 20910
   (301) 920-9127 - phone (301) 587-2365 - fax
   michelles@nutritioncare.org

3. **Applicable Standards:** The parties agree that the CE program shall be developed and presented in accordance with accrediting organizations' criteria and standards, which are incorporated herein by reference. In addition, the parties agree that the program shall comply with the ACCME Standards for Commercial Support of Continuing Medical Education.

4. **Financial Obligations:** The course budget will cover all expenses and the Joint Provider will accept responsibility for any deficit or profit incurred. A.S.P.E.N. will not be held responsible for any financial obligations unless reflected in an accompanying contract.

   A. Meeting logistic planning must be reviewed by A.S.P.E.N., with all expenses involved to be paid by Joint Provider.

   B. Fees, stipends, honoraria, travel expense reimbursement and other expenses for the program faculty shall be covered by the course budget. Faculty may not receive funds directly from any Commercial Supporter.

   C. Funds from Commercial Sources must be paid to Joint Provider under an educational grant contract between A.S.P.E.N. and the Commercial Sponsor. This letter of agreement will outline the terms, conditions, and purposes of the commercial support.

   D. Joint provider agrees to pay A.S.P.E.N. the sum of $500 for the following items. One Half of this is due with this signed agreement and the other half is due six months prior to the event.

      1. Marketing use of A.S.P.E.N. logo on promotional material, subject to review and approval by A.S.P.E.N.

      2. Accreditation for the following disciplines: Nurse, Pharmacist, Physician, Dietitian

   E. Joint provider agrees to pay A.S.P.E.N.

      1. Two percent (2%) of all event registration fees

      2. Four percent (4%) Credit card fees affiliated with registration payments

      3. Fees for establishment of the electronic evaluation and CE system($200)

5. **Commercial Relationship Disclosures:** Each planning committee member, faculty member, and session moderator, shall be required to complete a faculty relationship disclosure form, and shall be bound by their signature to the terms thereof. Any conflicts of interest shall be resolved *prior* to presentation of the program. Relationships with commercial supporters relevant to the topics of this program shall be disclosed to participants *prior* to educational activities in brief statements in conference materials such as brochures, syllabi, exhibits, poster sessions, and also in post-meeting publications.

6. **Educational Grants:** In this Joint Providership arrangement, Joint Provider may accept unrestricted educational grants on behalf of this meeting. If applicable, Joint Provider shall provide copies of all correspondence it sends requesting educational grants or other financial support for the CE program from organizations in the health care

industry. All educational grants or financial support provided for the CE program shall be documented in the form of a written agreement between A.S.P.E.N. and the contributing organization. Joint Provider will be held responsible for all items promised to contributing organization in such an agreement. A.S.P.E.N. will not be held responsible for any such items. Joint Provider may not accept any commercial funds without the express approval of A.S.P.E.N. nor without a fully executed letter of agreement. Grants or commercial funding may be accepted as educational grants only and should be used to support the total course budget in accordance with established institutional policies and guidelines. Faculty/attendees may not be paid directly by industry for registration fees, travel, or honoraria. Acknowledgement in program materials must be stated as: "supported in part by educational grants from______." Acknowledgment signs may also be used. Acknowledgements may not include mention of any specific product name, but may include the contributor's name, mission and logo.

Additional terms of commercial support:

Arrangements for commercial exhibits/advertisements may not influence planning or interfere with the presentation, nor may they be a condition of the provision of commercial support for continuing education activities.

Exhibits may not be in the meeting room. Participants must not be required to pass through exhibits to access the meeting room. Representatives of commercial interests may not engage in sales or promotion during the activity.

Product advertisements may not appear in educational materials.

Content must promote quality or improvements in healthcare, be non-biased and balanced, and must refer to products by their generic names whenever possible.

7. **Documentation:** JOINT PROVIDER shall keep the following documentation for accreditation compliance. This documentation shall be forwarded to A.S.P.E.N. prior to the program for review, modification, and approval or, when appropriate, within 45 days of the program date.

A. A written statement of Joint Provider's mission as included in the initial letter of intent

B. Documentation of educational planning and evaluation. This will include:

- Activity title, date, format and location (if live in-person) and number of contact hours per discipline.
- Names and credentials and disclosures forms of persons planning the activity with documentation of expertise (CV).
- Target audience description.
- Needs assessment method and results. Documented link of needs to desired program outcome and determination of practice gaps. (via planning committee minutes, emails, etc.)
- Faculty disclosure data, CVs, release forms and contracts.
- Goal, objectives and teaching strategy for the overall program and each individual session (if applicable).
- Definition of Successful Completion.
- Program advertisements and brochures
- Final program outline and timetable (schedule)

- Faculty guidance materials and contracts
- Program syllabus showing faculty and planning committee disclosures, and acknowledgement of any commercial support
- Budget for the overall program and its major components, both proposed and actual income-expense records
- Executed commercial support letters of agreement as signed by sponsor and A.S.P.E.N.
- Accurate program registration list (name/address/discipline/email) This list must be sorted by discipline

8. Use of Names

A. The names of the accredited sponsor (A.S.P.E.N.) shall appear on all CE program promotional materials and on the printed program and syllabus.

B. Neither Joint Provider nor A.S.P.E.N. shall use the name, trademarks, logo, or likeness of the other in any advertising or promotional material without the other party's prior express written consent.

9. Miscellaneous Terms

A. **Assignment:** Neither party shall subcontract, delegate or assign their duties under this Agreement without the prior written consent of the other party.

B. **Entire Agreement:** This Agreement, together with any and all attachments is incorporated by reference, constitutes the full and complete understanding of the parties regarding the subject matter herein. No modification or alteration of or addition to this Agreement shall be effective to bind the parties hereto unless it shall be in writing and signed by authorized representatives of the parties.

C. **Governing Law:** This Agreement is made and entered into in the state of Maryland and shall be governed in all respects by the laws of Maryland.

D. **Independent Contractor Relationship:** This Agreement is not intended to create nor shall be construed to create any relationship between the parties other than that of independent entities contracting for the purpose of effecting the provisions of this Agreement. None of the parties or any of their representatives shall be construed to be the agent, employer, employee or representative of the other. Additionally, nothing in the execution of this Agreement or in its performance shall be construed to establish a joint venture by or partnership between the parties.

E. **Termination of Agreement:** This Agreement shall remain in effect until terminated by either party or until the completion of the jointly sponsored program, including submission of required documentation to A.S.P.E.N. Either party may terminate this Agreement without cause at the completion of all programs that are then in development. Either party may terminate this Agreement for material breach by the other party by giving that party notice of the breach and thirty (30) days to cure the breach. If the breach is not cured within the thirty-day period, the Agreement shall terminate. Upon termination the parties shall do a final financial reconciliation for each of the programs pursuant to this Agreement.

IN WITNESS WHEREOF, the parties hereto have executed this Agreement as of the respective dates written below.

Joint Provider	**A.S.P.E.N.**
By:	By: Debra Ben Avram, MS, CAE
Title:	Title: CEO
Signature:	Signature:
Date:	Date:

SAMPLE LETTER FOR SPEAKER CONFIRMATIONS - EDIT AS APPROPRIATE

Date

[Speaker Name]

[Speaker Address]

Dear [Speaker Name]:

On behalf of the **INSERT ORGANIZATION NAME**, thank you for agreeing to be a speaker at **INSERT EVENT NAME, DATE AND LOCATION**. This interdisciplinary conference brings together physicians, dietitians, nurses, pharmacists, researchers and other nutrition professionals to learn about the latest in nutrition support.

Your presentation will be the **[x of y]** presentations in the session titled, **[session title] on [Date from Start Time – End Time].** Your topic is **[Speaker Topic]** and is scheduled for **[# of minutes]**, with an additional **[# of minutes]** minutes for questions from the audience. This is a/an **[program level]** level course, which **[insert description of program level]**. I encourage you to make liberal use of patient cases to reinforce the materials, provide practical insight into managing clinical issues and allow audience involvement. Additionally, all information presented should be evidenced based and include current references.

Co-Presenters:
Your co-presenters are listed below. I encourage you to contact them to review content and avoid overlap.

[**Insert other faculty, topics, and contact info, including moderator**]
[Insert learning objectives for the overall session]

Submission Information:
It is critical to the success of the program that we receive your presentation materials by the due date. Handouts need to be created and provided to attendees. We greatly appreciate the submission of your program materials in a timely fashion

The items listed below are due by **INSERT DEADLINE DATE**.

1. **PowerPoint Presentation (note to chapter: if you are not collecting presentations to share with attendees, you should collect an outline for attendees, refer to the outline template sample for this)**
    a. **Please include your:**
        i. **Name, title, affiliation**
        ii. **Learning Objectives**
        iii. **Commercial Relationship Disclosures. If none, list Nothing to Disclose**
    b. **Please use the ______ slide template for your presentation**
    c. **Presentation should be ______ slides**
2. **3-6 Self Assessment Questions/Answers/ References**
3. **Disclosure/Conflict of Interest Statement** (see attached *Sign and Return* document)
4. **Presentation Recording Release** (see attached *Sign and Return* document)
5. **A picture of yourself** (optional)
6. **CV/Resume**

Planning Your Presentation:
Some important points to help you in preparing:

- **Polling Questions and Audience Engagement:** Presenters have the option to poll the audience during their presentation. This allows for continued audience participation in the event.

- **Program Level:** This program is identified as an **intermediate-level course – update as appropriate**. Please consider that attendees should have knowledge of the basic content areas in your topic. This will allow you to construct your presentation at the appropriate level and avoid spending time presenting too much introductory information.

- **Evidence-Based:** Our attendees are eager to learn about the literature supporting our clinical practice. **INSERT CHAPTER NAME** place strong emphasis on scientific rigor and evidence-based practice in the design of our programs. **Please be sure to integrate relevant research findings into your materials and discussion as you emphasize evidence-based practice.**

As we discussed, accreditation regulations require that any commercial relationships you have with companies producing or distributing healthcare goods and services must be addressed. If not already done, you will be required to disclose any commercial relationships that you have with these companies. Please be sure that the focus of your presentation is not on the product or services of any company with whom you have a relationship, and that you present the best available evidence for recommendations offered.

Remuneration:

[include if applicable] In appreciation for your participation, we will offer reimbursement up to **[insert amount]** for your expenses incurred (airfare, hotel, and meals) or an honorarium for that amount, as well as a **[insert amount]** discount on early conference registration or a complimentary registration.

Note: Your full honorarium of **[insert amount]** is contingent upon submission of your program material by the deadline. IF **INSERT CHAPTER NAME** does not receive your program material on time, 30% of your honorarium will be deducted to help cover copying expenses onsite. I apologize in advance for any inconvenience this may cause; however, conference attendees have expressed the importance of program material inclusion in the syllabi and my goal is to ensure the best educational experience at Clinical Nutrition Week.

Again, thank you for agreeing to participate in EVENT NAME. If you have any questions, please do not hesitate to contact me or INSERT CONTACT INFORMATION. I look forward to working with you.

Sincerely,

[your name]

It is very important that we have accurate contact information for you. To help expedite receipt of your speaker information, please verify your address above. Please note that the majority of communication from the national office is done electronically, so be sure to include your email address.

SPEAKER AGREEMENT - SAMPLE

IMPORTANT: Please read the terms of this agreement carefully. Your signature attests to your understanding of the terms of your participation as stated in this agreement. **NOTE**: If the program coordinator who enlisted your participation has indicated that you will receive reimbursement of any kind which is not reflected in this agreement, DO NOT SIGN THE FORM, and contact insert name of appropriate chapter respresentative immediately. Otherwise, your signature confirms your agreement to the terms herein. Please correct any information that mis-states your name, credentials, etc., and provide your phone, fax numbers and e-mail address.

NAME: ____**CREDENTIALS:**_______________

ADDRESS: ____

TEL#________________FAX #__________________ E-MAIL_____________________________

DATE OF PROGRAM:__________**TIME OF PROGRAM**: _______________________

PROGRAM TITLE:____

PRESENTATION TITLE: ____

A/V REQUIREMENTS: ____

REIMBURSEMENT TERMS: ____

FACULTY GUIDELINES: Educational programs are not intended as forums for marketing products or services. Speakers MUST refrain from making references to proprietary products or services unless such references are made as a result of research on the specific products. All faculty members are REQUIRED to disclose any relationship/conflicts of interest and off-label/investigational usage discussions to our educational activity participants. Additionally, the speaker may not make recommendations for patient treatment that are not supported by current scientific references. Please refer to the "Speaker Relationships/Disclosure Form" for more information.

I have read this agreement and I agree to participate.

Signed: ____Date: _____________________________

Please return this signed agreement to ____

Insert name, address, fax and email address of the appropriate chapter contact person

INSERT CHAPTER NAME AND CONTACT INFO.

Speaker Release Assignment and Non-Infringement Warranty - SAMPLE

EVENT:
DATES:
LOCATION:

- ☐ *I represent to **INSERT CHAPTER NAME** that I own, and I hereby convey to **INSERT ORG NAME**, all copyright interest in all of the materials contained in my remarks and written materials to be delivered at **INSERT EVENT NAME,** except to the extent that ownership by third parties of any portion of such materials is expressly indicated. I also represent to **INSERT ORG NAME** that my remarks and related written materials do not infringe upon the rights of any third parties. I do retain the right to revise, adapt, prepare derivative works, reproduce and distribute such remarks and materials without having to obtain **INSERT CHAPTER NAME**. approval or having to make any accounting of profits to **INSERT ORG NAME**, provided that I shall display **INSERT ORG NAME** copyright interest in such materials when I produce them or allow others to do so.*

- ☐ *I agree to notify **INSERT ORG NAME** which of my written materials are owned by the third party and cannot be reproduced in any medium copyrighted by **INSERT ORG NAME**.*

- ☐ *I also understand that if I was an employee of the U.S. Federal Government at the time when the remarks and related written materials to be delivered by me at **INSERT EVENT NAME** were prepared for publication, such remarks and written materials are not protected by copyright. There are no copyright ownership interest to be transferred and I do warrant that such remarks and written materials do not infringe the rights of any third parties.*

- ☐ ***If applicable:** I agree that an article reporting on my presentation may be included in the post-**INSERT EVENT NAME** newsletter or on the **INSERT ORG NAME** website, the purpose of which is to provide meeting highlights to those members who did not attend **INSERT EVENT NAME**.*

- ☐ *I agree that if I have any commercial relationships relevant to my topic, my presentation will be evidence-based and I will not present specific products/services of that entity.*

- ☐ *I agree to give the **INSERT ORG NAME** permission to audio record, video record, digitally stream, photograph and to produce my presentations and written materials in any medium for **INSERT EVENT NAME**, including subsequent sale after the program by a vendor selected by **INSERT ORG NAME** and I understand that I will not receive any royalty from the sales.*

___ I agree with the above statements.
___ I do not agree with the above statements, and do not grant permission for my presentation to be audio recorded.

(PLEASE PRINT)
Speaker's Name:____

Speaker's Signature: ________________________________Date: ___________________

Complete and return by <u>INSERT DEADLINE DATE</u> to:
INSERT CHAPTER NAME AND CONTACT INFO.

SPEAKER THANK YOU LETTER - SAMPLE

March 29, 2013

«Salutation» «First» «Last»
«Address_Line_1»
«Address_Line_2»
«City», «State» «Zip»
«Country»

Dear «Salutation» «Last»:

Thank you for presenting at INSERT EVENT NAME for the INSERT CHAPTER NAME. Your presentation was very well received by our attendees, and we hope you enjoyed presenting as much as they enjoyed listening.

INSERT CHAPTER NAME. has a tradition of providing nutrition support professionals with education programs that contain the latest advances in clinical practice and research. We are honored to have had you join us to continue this tradition.

We hope that you enjoyed the conference and that you will consider returning in the future.

Thank you again for taking the time to speak at INSERT EVENT NAME.

Sincerely,

INSERT CHAPTER LEADER NAME AND TITLE

Speaker Guidelines INSERT EVENT NAME **- SAMPLE**

1. Please be sure you understand what is expected of you — the general scope/educational level of the session and the topic covered by you, the topics covered by the other faculty, the duration of your individual presentation, and the sequence of speakers. If you have any questions, please contact the program planner for your session (s).

2. A chapter event planning committee member will provide you with more information on your session, including the title, program description, your honorarium, if applicable, along with other important information. You will also have the opportunity to submit required speaker documentation, along with your presentation and presentation summary by the necessary due dates. Please refer to the submission deadlines below.

   Submission Deadlines: All submissions can be submitted in the Speaker Resource Center

   - Presentation Outline: **INSERT DEADLINE DATE**

   - Speaker Affirmations, disclosures, and CV: **INSERT DEADLINE DATE**

   - AV or Other Special Needs: **INSERT DEADLINE DATE** (Note: N/A for FLS Speakers). Please email **INSERT CHAPTER LEADER NAME**, with any AV or other special request/s **at INSERT CHAPTER LEADER CONTACT INFO.**

3. When preparing your information for your presentation, be mindful of the educational level of your topic. Whether basic, intermediate or advanced, you should assume the appropriate knowledge base and be sure not to review certain material the audience should already know.

4. **If applicable: INSERT CHAPTER NAME** does provide a laptop in each meeting room. You should arrive early to pre-load your presentation onto the laptop.

5. **If applicable:** Note: the laptops available onsite will only support a windows platform. Mac users should bring their own laptop and any additional attachments/dongles required to be connected to A/V

6. Although there is much information to cover, please do not go beyond your allotted time.

7. Visit the meeting room at least 15-20 minutes before the session begins to upload your presentation. Identify the audiovisual setup; make sure the appropriate equipment is available and running properly. If you have any problems or questions, notify the moderator or AV technician.

8. Accreditation guidelines require the following:

   - All recommendations for clinical practice are evidence-based.
   - Presentations provide a balanced view of therapeutic option.
   - **Generic product names should always be used**

9. Please plan to remain at the end of the session for a few minutes to answer additional questions.

Speaker Guide to Preparing Your Program Materials for **INSERT EVENT NAME**

Please follow the guidelines below to design your presentation materials. Thank you for assisting us in providing attendees with a quality syllabus and presentation during INSERT EVENT NAME.

Outline Information for the INSERT EVENT NAME **Conference Syllabus:**

- Name, Title, Affiliation
- Presentation Title
- You **must** identify whether or not you, as a speaker have any commercial relationships to disclose that are relevant to the topic being presented. Please list this information on your outline. Examples to follow:
    - "I have no commercial relationships to disclose"
    - "I have no commercial relationships relevant to the topic being presented"
    - "I have a commercial relationship with Company X as a consultant/member of speaker's bureau, etc and will not include any practice recommendations and will address only evidence based science in my presentation"

      or

      "I have a commercial relationship with Company X as a consultant/member of speaker's bureau, etc and will provide practice recommendations that are based on formal structured review of the literature and will state inclusion and exclusion criteria".

- One paragraph overview/summary of your presentation, highlighting the key points. This should be thought of as an abstract of your presentation.
- Three (3) learning objectives. These learning objectives will also need to be included in your PowerPoint presentation, see information below. Learning objectives complete the statement: At the conclusion of the presentation, the learner will be able to: ________.
- Three (3) multiple choice learning assessment questions with correct answers provided
- A maximum of 10 key references used in your presentation. This is not a complete list of all references used, but should list those references most instrumental on the topic being presented.
- Format: all information listed above should fit on less than two 8.5" x 11" pieces of paper with margins set at .75 inch on all sides; font size no less than 11 pt.

Information for the INSERT EVENT NAME **Power Point Presentation:**
All requirements listed below are to ensure INSERT CHAPTER NAME remains in compliance with the various accrediting bodies to offer CE credit to physicians, dietitians, pharmacists and nurses. We appreciate you taking the time to ensure all the requested information is included in both your submission and presentation.

- Name, Title, Affiliation
- Presentation Title
- Second or third slide in the presentation **must** contain whether or not you, as a speaker have any commercial relationships to disclose that are relevant to the topic being presented. Examples to follow:
    - "I have no commercial relationships to disclose"
    - "I have no commercial relationships relevant to the topic being presented"

- o "I have a commercial relationship with Company X as a consultant/member of speaker's bureau, etc and will not include any practice recommendations and will address only evidence based science in my presentation"

  or

- o "I have a commercial relationship with Company X as a consultant/member of speaker's bureau, etc and will provide practice recommendations that are based on formal structured review of the literature and will state inclusion and exclusion criteria".

- Three (3) learning objectives <u>must</u> be included in your presentation, preferably on the third or fourth slide:
  - o Objectives should relate to the practice gap (in knowledge, performance, competence, or patient outcomes) that was identified for your session, and should establish measurable and observable actions that will result from this educational activity. [Who will do what as measured by what and by when]. "Upon completion of this session, the learner will be able to…"
  - o Some descriptive terms to use in instructional objectives are: analyze, apply, assess, classify, demonstrate, detect, develop, distinguish, estimate, evaluate, give your opinion, justify, measure, perform, plan, produce, resolve, solve, write, etc.

- Three (3) multiple choice learning assessment questions. During the presentation you can use audience polling or other methods of engagement to work through answers to the learning assessment questions.

- All questions need to relate to the session objectives and thus the identified learning/knowledge gap.

- Questions will be used as an assessment of attendees' knowledge prior to and at the conclusion of the education session. The questions used pre and post education session can be identical, otherwise they should be similar in nature. Questions should appear on slides at the beginning of the presentation and again at the end of the presentation. The audience can be polled on site by a show of hands.

- Applicable charts, tables or graphs

- Current references to support the overall presentation. Utilization of the current literature to support the data/information being presented should be apparent throughout the presentation, i.e. references should be included on the slides. Additionally, complete bibliographic information at the end of the presentation should be included.

- Many sessions contain several presenters. In order to ensure each presenter has adequate time to cover their information, please limit your content. For example, if you are giving a 20 minute talk, your material should include no more than 36 – 40 slides.

Additional Information:

- You will be asked to submit a current version of your CV (you only need to submit your CV once if you are speaking more than once)

- You will be asked to disclose any commercial relationships for **<u>each presentation</u>** that you will be providing at **INSERT EVENT NAME**, this information is needed for **INSERT CHAPTER NAME** records. A relationship may be relevant for one presentation and not another, hence the requirement to disclose for each presentation.

- The Accreditation Council for Continuing Medical Education (ACCME) prohibits providers from asking commercial supporters to suggest topics or speakers for educational activities, or to review content for accuracy

- All requirements listed above are to ensure **INSERT CHAPTER NAME** and A.S.P.E.N. remain in compliance with the various accrediting bodies to offer CE credit. We appreciate you taking the time to ensure all the requested information is included in both your submission and presentation.

Chapter Event – Speaker/Presentation Outline Template

Please try to keep outline limited to 2 pages or less

- Name, Title, Affiliation
- Presentation Title
- You **must** identify whether or not you, as a speaker have any commercial relationships to disclose that are relevant to the topic being presented. Please list this information on your outline. Examples to follow:
    - "I have no commercial relationships to disclose"
    - "I have no commercial relationships relevant to the topic being presented"
    - "I have a commercial relationship with Company X as a consultant/member of speaker's bureau, etc and will not include any practice recommendations and will address only evidence based science in my presentation"

      or

    - "I have a commercial relationship with Company X as a consultant/member of speaker's bureau, etc and will provide practice recommendations that are based on formal structured review of the literature and will state inclusion and exclusion criteria".

Presentation Overview/Summary

- One paragraph overview/summary of your presentation, highlighting the key points. This should be thought of as an abstract of your presentation.

Learning Objectives

- Learning objectives for the presentation. It is acceptable to have only one learning objective for a focused learning session, however having more than one is also acceptable.

At the conclusion of the presentation, the learner will be able to:

1.
2.
3.

- *Format: all information listed above should fit on less than two 8.5" x 11" pieces of paper with margins set at .75 inch on all sides; font size no less than 11 pt.*

Learning Assessment Questions

1. Question 1:
    A. Answer A (or True)
    B. Answer B (or False)
    C. Answer C
    D. Answer D

2. Question 2:
    A. Answer A (or True)
    B. Answer B (or False)
    C. Answer C
    D. Answer D

3. Question 3:

A. Answer A (or True)
B. Answer B (or False)
C. Answer C
D. Answer D

Learning Assessment Answers:

1. Answer = D; Rationale: *Explain answer*
2. Answer = False; Rationale: *Explain answer*
3. Answer = B; Rationale: *Explain answer*

References

- *A maximum of <u>10</u> key references used in your presentation. This is not a complete list of all references used, but should list those references most instrumental on the topic being presented.*

1.
2.
3.
4.

The slides shown should be used as a template for your power point presentation. The information included is necessary to ensure INSERT CHAPTER NAME and A.S.P.E.N. **remain in compliance with various accrediting bodies. Additionally, the** INSERT CHAPTER NAME **logo should be on your slides.**

NOTE:
The slide titles used are just examples, it is not necessary for your presentation to include these exact titles, however the content is not negotioable.

Presentation Title Slide

- Full Name, Credentials
- Affiliation/Institution
- Affiliation/Institution City and State

Disclosures

- Company, your role

Note, in order to comply with accreditation guidelines, disclosures should be included in your presentation. For any disclosures you must list the company and your affiliation with the company, for example: Company X: Speaker's Bureau

Learning Objectives

1. Three (3) learning objectives which complete the statement:

   Upon completion of this session, the learner will be able to…..

Text, applicable charts, tables or graphs

This information is not required, but can be visually stimulating for the audience. This is considered the descriptive part of the presentation and may be several slides in length.

Note, tables and graphs should fit within the slide

Learning Assessment Questions

Learning assessment questions can be a great way to engage the audience in your presentation and allow you to learn about current practices, audience understanding of a topic, etc.

Please integrate learning assessment questions into your presentation or at a minimum include some at the conclusion of your presentation to assess knowledge gained.

References

1. Numbered Text. Current references to support your overall presentation

Moderator Guidelines INSERT EVENT NAME **- SAMPLE**

On behalf of the **INSERT CHAPTER NAME**, thank you for agreeing to be a moderator at **INSERT EVENT NAME**.

Session Moderators serve a critical role throughout **INSERT EVENT NAME** as it is their responsibility to frame the session content, introduce the speaker(s), moderate the Q&A, and ensure all sessions run during the allotted time. We hope that the following information is helpful in preparing for this important role.

Below is a list of items to assist you as you plan for your moderator role at **INSERT EVENT NAME**.

If applicable: Additionally, **INSERT CHAPTER NAME** will continue to integrate some abstracts into the education sessions for a better integration of science into the education program. The session you will be moderating may have an abstract incorporated into it; you will be notified if this is the case in **INSERT DEADLINE DATE** to allow for ample time to make necessary adjustments to the session.

Moderator responsibilities:

Moderators are responsible for the overall session management from the development of materials and coordination with speakers to management of attendees and speakers during the live session. Moderators should set the tone of the session and are expected to follow the moderator script (separate document) in addition to the following responsibilities:

- assisting the speakers in the development of materials at the appropriate level
- reviewing the speakers' slides for any signs of commercial bias prior to the information being presented
- setting up the computer in the presentation room with all presentations loaded and minimized, allowing for a quick transition between each speaker
- introducing each speaker and providing the audience with a brief bio of the speaker
- ensuring the speakers stay within the allotted time frame for their presentations
- *questioning speakers on any commercial bias that may have surfaced during the presentation – this should be done in front of the audience to demonstrate that the potential bias is being managed*
- managing the question and answer session and asking thought provoking questions of the speakers as related to the topic
- in the event an abstract has been inserted into the session you are moderating, it is expected that you will become familiar with the literature and be able to ask questions of both the speakers and abstract presenters. Ultimately this will help with the audience's ability to translate the science from bench to bedside.

Included for your information is a list of the submission dates and other supporting information that has been shared with INSERT EVENT NAME **speakers:**

- Presentation Outline: in **INSERT DEADLINE DATE**
- Speaker Affirmations, disclosures, and CV: in **INSERT DEADLINE DATE**
- PowerPoint presentation: in **INSERT DEADLINE DATE** (if applicable).
- AV or Other Special Needs: in **INSERT DEADLINE DATE**. Please email INSERT CHAPTER LEADER NAME with any AV or other special request/s at INSERT CHAPTER LEADER CONTACT INFORMATION.

1. When preparing your information for your talk, be mindful of the educational level of your topic. Whether basic, intermediate or advanced, you should assume the appropriate knowledge base and be sure not to review certain material the audience should already know. As a moderator, you can help to facilitate this.

2. **If applicable: INSERT CHAPTER NAME** does provide a laptop in each meeting room. You should arrive early to pre-load your presentation onto the laptop.

3. **If applicable**: Note: the laptops available onsite will only support a windows platform. Mac users should bring their own laptop and any additional attachments/dongles required to be connected to A/V

4. Although there is much information to cover, please do not go beyond your allotted time.

5. Visit the meeting room at least 15-20 minutes before the session begins. Identify the audiovisual setup, make sure the appropriate equipment is available and running properly. If you have any problems or questions, notify the moderator or AV technician.

6. Accreditation guidelines require the following:

   - All recommendations for clinical practice are evidence-based.
   - Presentations provide a balanced view of therapeutic option.
   - Generic product names should always be used

7. Please plan to remain at the end of the session for a few minutes to answer additional questions.

Speaker Guide to Preparing Your Program Materials for **INSERT EVENT NAME**

Please follow the guidelines below to design your presentation materials. Thank you for assisting us in providing attendees with a quality syllabus and presentation during **INSERT EVENT NAME**.

Outline Information for the INSERT EVENT NAME **Conference Syllabus:**

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- Presentation Title
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or

"I have a commercial relationship with Company X as a consultant/member of speaker's bureau, etc and will provide practice recommendations that are based on formal structured review of the literature and will state inclusion and exclusion criteria".

- One paragraph overview/summary of your presentation, highlighting the key points. This should be thought of as an abstract of your presentation.
- Three (3) learning objectives. These learning objectives will also need to be included in your PowerPoint presentation, see information below. Learning objectives complete the statement: At the conclusion of the presentation, the learner will be able to: ________.
- Three (3) multiple choice learning assessment questions with correct answers provided
- A maximum of <u>10</u> key references used in your presentation. This is not a complete list of all references used, but should list those references most instrumental on the topic being presented.
- Format: all information listed above should fit on less than two 8.5" x 11" pieces of paper with margins set at .75 inch on all sides; font size no less than 11 pt.

Information for the INSERT EVENT NAME **Power Point Presentation:**
All requirements listed below are to ensure **INSERT CHAPTER NAME**. remains in compliance with the various accrediting bodies to offer CE credit to physicians, dietitians, pharmacists and nurses. We appreciate you taking the time to ensure all the requested information is included in both your submission and presentation.

- Name, Title, Affiliation
- Presentation Title
- Second or third slide in the presentation **<u>must</u>** contain whether or not you, as a speaker have any commercial relationships to disclose that are relevant to the topic being presented. Examples to follow:
    - "I have no commercial relationships to disclose"
    - "I have no commercial relationships relevant to the topic being presented"
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      or

    - "I have a commercial relationship with Company X as a consultant/member of speaker's bureau, etc and will provide practice recommendations that are based on formal structured review of the literature and will state inclusion and exclusion criteria".

- Three (3) learning objectives <u>must</u> be included in your presentation, preferably on the third or fourth slide:
    - Objectives should relate to the practice gap (in knowledge, performance, competence, or patient outcomes) that was identified for your session, and should establish measurable and observable actions that will result from this educational activity. [Who will do what as measured by what and by when]. "Upon completion of this session, the learner will be able to…"
    - Some descriptive terms to use in instructional objectives are: analyze, apply, assess, classify, demonstrate, detect, develop, distinguish, estimate, evaluate, give your opinion, justify, measure, perform, plan, produce, resolve, solve, write, etc.

- Three (3) multiple choice learning assessment questions. During the presentation you can use audience polling or other methods of engagement to work through answers to the learning assessment questions.

- All questions need to relate to the session objectives and thus the identified learning/knowledge gap.

- Questions will be used as an assessment of attendees' knowledge prior to and at the conclusion of the education session. The questions used pre and post education session can be identical, otherwise they should be similar in nature. Questions should appear on slides at the beginning of the presentation and again at the end of the presentation. The audience can be polled on site by a show of hands.

- Applicable charts, tables or graphs

- Current references to support the overall presentation. Utilization of the current literature to support the data/information being presented should be apparent throughout the presentation, i.e. references should be included on the slides. Additionally, complete bibliographic information at the end of the presentation should be included.

- Many sessions contain several presenters. In order to ensure each presenter has adequate time to cover their information, please limit your content. For example, if you are giving a 20 minute talk, your material should include no more than 36 – 40 slides.

Additional Information for All Speakers and Moderators:

- You will be asked to submit a current version of your CV (you only need to submit your CV once if you are speaking more than once)

- You will be asked to disclose any commercial relationships for **<u>each presentation</u>** that you will be providing at **INSERT EVENT NAME**, this information is needed for **INSERT CHAPTER NAME** records. A relationship may be relevant for one presentation and not another, hence the requirement to disclose for each presentation.

- The Accreditation Council for Continuing Medical Education (ACCME) prohibits providers from asking commercial supporters to suggest topics or speakers for educational activities, or to review content for accuracy

- All requirements listed above are to ensure **INSERT CHAPTER NAME** and A.S.P.E.N. remain in compliance with the various accrediting bodies to offer CE credit. We appreciate you taking the time to ensure all the requested information is included in both your submission and presentation.

Insert Chapter Name. Travel Expense Voucher
Instructions and Allowable Expenses

1. **Transportation**

   Air/Train Travel

   Please use only coach or economy class air and train fares. All air/train travel reimbursements are based on a ticket price booked at least 30 days prior to event. Submit receipts for tickets along with Travel Expense Voucher.

   Automobile Travel

   Reimbursement for use of traveler's auto will be at the current rate of **$.565** per mile (**revised 1.01.2013**), to include cost of oil and gasoline and cannot exceed the cost of travel by air. Bridge, road tolls and/or parking expenses may be claimed in addition to the mileage allowance. Please furnish receipts for these items along with the Travel Expense Voucher.

   Comment [ms1]: Should be updated annually with new amounts

   Ground Transportation

   Public ground transportation, especially airport buses and vans, should be used whenever possible. Except for unusual circumstances, which should be documented, travel costs from home-to-airport/airport-to-home will be reimbursed at a maximum of **$20.00** (taxi or limousine) per trip, or **$.565** per mile for use of personal auto. Taxi cab and airport limousine fares will be reimbursed only as they relate to travel to and from official Insert Chapter Name. functions and only when available mass transportation is not feasible.

   Rental Car

   Rental car charges will be covered for travel from the traveler's home city to official Insert Chapter Name functions in lieu of air or train travel. Reimbursement cannot exceed the cost of travel by air and will be authorized at the economy class rate for autos.

2. **Meals**

   Reimbursement is available on a per meal basis. The maximum reimbursable amount for meals per day is **$42.00** to cover the actual cost of three meals. For partial days, reimbursement will be based on the following maximum allowances: Breakfast- $11.00, Lunch- $11.00, Dinner- $20.00. Receipts for actual costs of meals must be submitted along with the Travel Expense Voucher. Reimbursement will not be available for any meal provided by the Society for a group function. If a receipt is submitted for a meal, which includes several Insert Chapter Name attendees, please indicate this on the Travel Expense Voucher.

3. **Hotel & Lodging**

   Travelers' room charges will be reimbursed at group rates where Insert Chapter Name has made such arrangements and for a period of time necessary for the completion of the official purpose of the travel. In other instances, reimbursement will be limited to reasonable room costs for single persons only (not family members), in regular accommodations (not suites). Insert Chapter Name encourages room sharing where feasible and comfortable. Insert Chapter Name reserves the right to limit reimbursement for room charges where such charges appear excessive or unnecessary for normal completion of Society-related responsibilities.

4. **Miscellaneous Expenses**

   Personal expenses including, but not limited to, laundry, valet, travel insurance, in-room movies, telephone calls, internet access charges, bar bills, etc., **will not** be reimbursed by Insert Chapter Name Telephone calls for official Insert Chapter Name business will be reimbursed and must be so noted on your hotel bill.

5. **Honorarium**

   If you are entitled to an honorarium as stated in your agreement with Insert Chapter Name please indicate where noted on the Travel Expense Voucher. The IRS requires a 1099-Misc for honoraria of $600 or more.

FORMS MUST BE SUBMITTED WITHIN 30 DAYS

Revised 01/22/2013

TRAVEL EXPENSE VOUCHER
Insert Chapter Name
Insert chapter address, phone number

Please read the reverse side before completing this form. Furnish all information requested, and submit with receipts to support claims for reimbursement. **Requests must be submitted within thirty (30) days**. Please indicate the address to which the reimbursement check is to be mailed.

Please print

NAME: ______________________ **DATE:** ______________

ADDRESS: ______________________ **PHONE:** ______________

______________________ **SOC SEC. #:** ______________

______________________ **E-MAIL:** ______________

PURPOSE OF TRAVEL: ______________________________

TRANSPORTATION (See Instruction #1 on reverse)

TRAVEL DATES	TO/FROM	AIR/TRAIN FARE	MILEAGE	GROUND TRANSP	TRANSP EXP
		$	$	$	$
		$	$	$	$
				SUBTOTAL	$

MEALS (See Instruction #2 on reverse)

Day 1	Day 2	Day 3	Day 4	Day 5	MEALS EXP
$	$	$	$	$	
				SUBTOTAL	$

HOTEL (See Instruction #3 on reverse)

ROOM CHARGE PER NIGHT	NUMBER OF NIGHTS		HOTEL EXP
$		SUBTOTAL	$

MISCELLANEOUS (See Instruction #4 on reverse)

DESCRIPTION OF ADDITIONAL EXPENSES		MISC EXP
	SUBTOTAL	$

HONORARIUM (See Instruction #5 on reverse)

DESCRIPTION OF PROGRAM INVOLVEMENT		HONORARIA
	SUBTOTAL	$

TOTAL FUNDS REQUESTED $ ______________

I certify that the above charges, incurred by me, are correct and proper, and are not being reimbursed by another party. In addition, I have indicated if airfare has been pre-paid by A.S.P.E.N.

Signed (Claimant): __________________________________Date: ________________

For Office Use Only:	**TOTAL REIMBURSEMENT DUE CLAIMANT $**
Use this space for designating approvals, account codes, etc.	

LEADING THE SCIENCE AND PRACTICE OF CLINICAL NUTRITION

American Society for Parenteral and Enteral Nutrition

LETTER OF AGREEMENT

FOR CONTRIBUTED FUNDS

The American Society for Parenteral and Enteral Nutrition (A.S.P.E.N.) is committed to presenting continuing education activities to physicians, pharmacists, nurses, and dietitians that promote improvements or quality in healthcare and are independent of the control of commercial interests. As part of this commitment, A.S.P.E.N. has outlined in this written agreement the terms, conditions, and purposes of commercial support for its continuing education activities. Commercial Support is defined as financial, or in-kind, contributions given by a commercial interest, that are used to pay all or part of the costs of a continuing education activity.

REGARDING TERMS, CONDITIONS AND PURPOSES OF CONTRIBUTED FUNDS

1. Between A.S.P.E.N., an accredited provider (Provider) of continuing education for ACCME, ACPE, ANCC/COA, and CDR, and ____(Company)

2. Title of Continuing Education Activity (Program)__________________________________

3. Continuing Education Activity Location ____

4. Continuing Education Activity Date (s) ____

5. Please identify the purpose contributed funds and amounts below

☐ Unrestricted educational contribution for support of the continuing education activity in the amount of $__________

☐ Contribution in the amount of $____________________for the following purposes:
1)____
2)____
3)____
4)____

☐ Support for catering functions in the amount of $________________ for a specific event (Specify)____

☐ In-kind contribution (e.g., equipment loan, brochure distribution) in the amount of $____________ (specify) ____

Payment is due 30 days after execution of this contract.

[*The ACCME defines a Commercial Interest (the ***Company***) as any proprietary entity producing, marketing, re-selling, distributing or otherwise participating in or profiting from the distribution, promotion or sale of health care good or services consumed by, or used on, patients, with the exemption of non-profit, insurance, government organizations, and non-health-care-related companies. The ACCME does not consider providers of clinical service directly to patients to be commercial interest.]

TERMS, CONDITIONS, AND PURPOSES

A.S.P.E.N. is responsible for all decisions regarding this educational activity, and cannot accept advice or services from the company as a condition of receiving this contribution. The Company may not stipulate the manner in which A.S.P.E.N. will fulfill any accreditation requirements.

Independence

1. This activity is for scientific and educational purposes only and will not promote any specific proprietary business interest of the Company.

Appropriate Use of Commercial Support

2. A.S.P.E.N. will make all decisions regarding the disposition and disbursement of funds from the Company.
3. All commercial support associated with this activity will be given with the full knowledge and approval of A.S.P.E.N. No other payments shall be given to the director of the activity, planning committee members, teachers or authors, joint sponsor, or any others involved with the supported activity.
4. A.S.P.E.N. will, upon request, furnish the Company documentation detailing the receipt and expenditure of the commercial support.

Commercial Promotion

5. Product promotion material /product advertisement of any type is prohibited in or during the continuing education activity. The juxtaposition of editorial and advertising material on the same products or subjects is not allowed. Promotional materials may not be displayed or distributed in the educational space immediately before, during or after a continuing education activity. Company may not engage in sales or promotional activities while in the space or place of the continuing education activity.
6. Company may not be the agent providing the continuing education activity to the learners.

Disclosure

7. A.S.P.E.N. will ensure that the source of support from the Company, either direct or "in-kind", is disclosed to the participants, in program brochures, syllabi, and/or other program materials, and at the time of the activity. Disclosure will not include the use of trade name or a product-group message. Acknowledgement of commercial support may state the name, mission, and clinical involvement of the company and may include corporate logos and slogans, if they are not product promotional in nature.

The Company and A.S.P.E.N. agree to abide by all requirements of the Accreditation Council for Continuing Medical Education (ACCME) Standards for Commercial Support of Continuing Medical Education (attached).

Accredited Provider: A.S.P.E.N. — American Society for Parenteral & Enteral Nutrition

Tax ID Number: 521161382 — 8630 Fenton Street Suite 412 Silver Spring MD 20910

Contact Person: Carol Woodside — Email Address: carolw@aspen.nutr.org

Phone Number: 301-920-9146 — Fax: 301-587-2365

Contributing Company:

Address:

City, State, Zip:

Contact Person: — Email Address:

Phone Number: — Fax:

Agreed by Authorized Representatives

Contributing Company:	**A. S.P.E.N.**
Signature ____________________	Signature ____________________
Date ____________________	Date ____________________
Print Name ____________________	Print Name Debra Ben Avram
Title ____________________	Title Chief Executive Officer

ACCREDITATION COUNCIL FOR CONTINUING MEDICAL EDUCATION STANDARDS FOR COMMERCIAL SUPPORT OF CONTINUING MEDICAL EDUCATION (2004)

1. ACCME Standard 1. Independence.
   1.1 ACCME provider must ensure that the following decisions were made free of the control of a commercial interest. The ACCME defines a "Commercial interest" as any proprietary entity producing health care goods or services, with the exemption of non-profit or government organizations and non-health care related companies.
      a. Identification of CME needs;
      b. Determination of educational objectives;
      c. Selection and presentation of content;
      d. Selection of all persons and organizations that will be in a position to control the content of the CME;
      e. Selection of educational methods;
      f. Evaluation of the activity.

   1.2 A commercial interest cannot take the role of non-accredited partner in a joint sponsorship relationship.
2. ACCME Standard 2: Resolution of personal conflicts of interests.
   2.1 The provider must be able to show that everyone who is in a position to control the content of an education activity has disclosed all relevant financial relationships with any commercial interest to the provider. The ACCME defines "relevant" financial relationships as financial relationships in any amount occurring within the past 12 months that create a conflict of interest.
   2.2 An individual who refuses to disclose relevant financial relationships will be disqualified from being a planning committee member, a teacher, or an author of CME, and cannot have control of, or responsibility for, the development, management, presentation or evaluation of the CME activity.
   2.3 The provider must have implemented a mechanism to identify and resolve all conflicts of interest prior to the education activity being delivered to learners.
3. ACCME Standard 3: Appropriate use of commercial support.
   3.1 The provider must make all decisions regarding the disposition and disbursement of commercial support.
   3.2 A provider cannot be required by a commercial interest to accept advice or services concerning teachers, authors, or participants or other education matters, including content, from a commercial interest as conditions of contributing funds or services.
   3.3 All commercial support associated with a CME activity must be given with the full knowledge and approval of the provider.

Written agreement documenting terms of support

3.4 The terms, conditions, and purposes of the commercial support must be documented in a written agreement between the commercial supporter that includes the provider and its educational partner(s). The agreement must include the provider, even if the support is given directly to the provider's educational partner or a joint sponsor.

3.5 The written agreement must specify the commercial interest that is the source of commercial support.

3.6 Both the commercial supporter and the provider must sign the written agreement between the commercial supporter and the provider.

Expenditures for an individual providing CME

3.7 The provider must have written policies and procedures governing honoraria and reimbursement of out-of-pocket expenses for planners, teachers and authors.

3.8 The provider, the joint sponsor, or designated educational partner must pay directly any teacher or author honoraria or reimbursement of out-of-pocket expenses in compliance with the provider's written policies and procedures.

3.9 No other payment shall be given to the director of the activity, planning committee members, teachers or authors, joint sponsor, or any others involved with the supported activity.

3.10 If teachers or authors are listed on the agenda as facilitating or conducting a presentation or session, but participate in the remainder of an educational event as a learner, their expenses can be reimbursed and honoraria can be paid for their teacher or author role only.

Expenditures for learners

3.11 Social events or meals at CME activities cannot compete with or take precedence over the educational events.

3.12 The provider may not use commercial support to pay for travel, lodging, honoraria, or personal expenses for non-teacher or non-author participants of a CME activity. The provider may use commercial support to pay for travel, lodging, honoraria, or person expenses for bona fide employees and volunteers of the provider, joint sponsor or educational partner.

Accountability

3.13 The provider must be able to produce accurate documentation detailing the receipt and expenditure of the commercial support.

4. ACCME Standard 4: Appropriate Management of Associated Commercial Promotion

4.1 Arrangements for commercial exhibits or advertisements cannot influence planning or interfere with the presentation, nor can they be a condition of the provision of commercial support for CME activities.

4.2 Product-promotion material or product-specific advertisement of any type is prohibited in or during CME activities. The juxtaposition of editorial and advertising material on the same products or subjects must be avoided. Live (Staffed exhibits, presentations) or enduring (printed or electronic advertisements) promotional activities must be kept separate from CME.

- For print, advertisements and promotional materials will not be interleafed within the pages of the CME content. Advertisements and promotional materials may face the first or last pages of printed CME content as long as these materials are not related to the CME content they face and are not paid for by the commercial supporters of the CME activity.
- For computer based, advertisements and promotional materials will not be visible on the screen at the same time as the CME content and not interleafed between computer "windows" or screens of the CME content.
- For audio and video recording, advertisements and promotional materials will not be included within the CME. There will be no "commercial breaks."
- For live, face-to-face CME, advertisements and promotional materials cannot be displayed or distributed in the educational space immediately before, during, or after a CME activity. Providers cannot allow representatives of Commercial Interests to engage in sales or promotional activities while in the space or place of the CME activity.

4.3 Educational materials that are part of a CME activity, such as slides, abstracts and handouts, cannot contain any advertising, trade name or a product-group message.

4.4 Print or electronic information distributed about the non-CME elements of a CME activity that are not directly related to the transfer of education to the learner, such as schedules and content descriptions, may include product-promotion material or product-specific advertisement.

4.5 A provider cannot use a commercial interest as the agent providing a CME activity to learners, e.g., distribution of self-study CME activities or arranging for electronic access to CME activities.

5. ACCME Standard 5: Content and Format free of commercial bias.

5.1 The content or format of a CME activity or its related materials must promote improvements or quality in healthcare and not a specific proprietary business interest of a commercial interest.

5.2 Presentations must give a balanced view of therapeutic options. Use of generic names will contribute to this impartiality. If the CME educational material or content includes trade names, where available trade names from several companies should be used, not just trade names from a single company.

6. ACCME Standard 6: Disclosures Relevant to Potential Commercial Bias.

Relevant financial relationships of those with control over CME content

6.1 An individual must disclose to learners any relevant financial relationship(s), to include the following information:

- Name of the individual;
- Name of the commercial interest(s);
- Nature of the relationship the person has with each commercial interest.

6.2 For an individual with no relevant financial relationship(s), the learners must be informed that no relevant financial relationship(s) exist.

Commercial support for the CME activity

6.3 The source of all support from commercial interests must be disclosed to learners. When commercial support is "in-kind", the nature of the support must be disclosed to learners.

6.4 "Disclosure" must never include the use of a trade name or a product-group message.

Timing of disclosure

6.5 A provider must disclose the above information to learners prior to the beginning of the educational activity.

CNW 2013: Evaluation criteria – Overall Evaluation
Highlighted = mandatory question

This evaluation applies to anyone who attended the conference as a full conference attendee, preconference attendee, or daily conference attendee. This DOES NOT apply to those who participated virtually, that is a different evaluation. This should be completed prior to the individual getting the CE certificate after they have completed all speaker and session evaluations.

Please check all that apply to your learning experience at Clinical Nutrition Week 2013:

- ☐ I enhanced my knowledge of nutrition support therapy and clinical nutrition.
- ☐ I gained strategies (improved my competence) in the areas of nutrition support and clinical nutrition
- ☐ As a result of knowledge and competence gained, I improved my diagnostic skills.
- ☐ I explored current nutrition support research topics and the potential application to clinical practice.
- ☐ I confirmed my current practice.
- ☐ None of the above.

Please rate the level with which you agree with the following:

	Strongly Agree	Agree	Disagree	Strongly Disagree	N/A
All topics were pertinent to the conference goal of providing nutrition support professionals with current and cutting edge information in the field of clinical nutrition from research and practice related perspectives.					
Overall conference depth and scope were consistent with my learning needs and contained practical suggestions I can apply to practice					
I met my personal, professional, educational, and/or career goals for attending Clinical Nutrition Week.					

Please rate the level with which you agree with the following regarding the objectives that were established for CNW 2013:
As an attendee at CNW 2013 I am able to/have

	Strongly Agree	Agree	Disagree	Strongly Disagree	N/A
Challenge current clinical practices					
Integrate evidence-based updates into practice					
Reflect on the implications of current research					
Identify gaps in my knowledge base that require further education and training					

Please describe any professional gaps (i.e. the strategies you need to do something that you currently do not have, or what you should be doing in practice that you are not currently doing) that you identified as a result of attending CNW 2013.

What portion of the program content was new to you?
☐ Almost none ☐ Some ☐ About half ☐ Almost all.

As a result of attending CNW 2013, I plan to make the following changes to my practice: [Text Box]

If you do not plan to make any changes to your practice, what are the barriers to changing your practice? [Text Box]

May we follow up with you in 6 months regarding changes made in your practice? Yes No

If yes, then please provide your email address. [Text Box]

What do you need to learn more about to improve your knowledge, competence, job performance and ultimately patient care? [Text Box]

What do you observe in your own practice or that of your colleagues that goes wrong in treating patients requiring nutrition support therapy - by which discipline, and why? [Text Box]

Please rate the following:

	Excellent	Very Good	Good	Fair	Poor
Professionalism of staff					
Efficiency of the course mechanics (e.g., room, space, lighting)					
Audio Visual					
Location (Phoenix, AZ)					
Hotel and conference facilities					

What portion of the program content was new to you?
☐ almost all ☐ considerable ☐ about half ☐ some ☐none

I have attended A.S.P.E.N.'s annual conference:
☐ first time ☐ 1 – 5 times ☐ 5 – 10 times ☐ 10 – 15 times ☐ over 15 times

I have been practicing in the field of nutrition support for:
☐ less than 2 years ☐ 2 – 5 years ☐ 5 – 10 years ☐ 10 – 15 years ☐ over 15 years

Do you agree that the CNW experience is valuable?
☐ yes ☐ no

Do you share your experiences at CNW with your colleagues?
☐ yes ☐ no

Do you find that the exhibit hall is a valuable part of CNW?
☐ yes ☐ no

Do you have sufficient time to explore the exhibit hall at CNW?
☐ yes ☐ no

Do you find the new layout of the exhibit hall easier to navigate?
☐ yes ☐ no

Do you like the addition of Industry educational sessions in the exhibit hall?
☐ yes ☐ no

Did you obtain useful information from the companies in the exhibit hall that will help you in your job function or institution?
☐ yes ☐ no

Do you have a role in recommending products or services at your institution?
☐ yes ☐ no

Are you sometimes and/or always involved in making final purchasing decisions for your institution?
☐ yes ☐ no