Roles and Responsibilities for Planning Accredited Continuing Education

Planning high-quality accredited continuing education requires input and guidance from subject matter experts and accreditation specialists. This document defines the roles and responsibilities typically associated with planning accredited continuing education in collaboration with UW–Madison ICEP.

ROLES

Planning Committee Lead: Provides leadership of the activity planning process. The Planning Committee Lead must be a subject matter expert and should represent a profession included in the target audience. The Planning Committee Lead might also be called the Activity Chair or Clinical Director.

Planning Committee Member: In collaboration with the Planning Committee Lead, planning committee members contribute to the overall activity planning while representing the educational needs of their respective profession. They must be subject matter experts and represent a profession included in the target audience.

Activity Coordinator/Project Manager: Provides logistical support for the activity planning process and serves as the point of contact for the Accreditation Specialist.

Accreditation Specialist: A member of the UW–Madison ICEP team responsible for overall accreditation management.

Faculty: Subject matter experts who contribute content to the activity and may include presenters, speakers, authors, reviewers, and beta testers.

RESPONSIBILITIES

Planning Committee Lead/Planning Committee Members

Accreditation and Policy Compliance

- Comply with Joint Accreditation™ criteria and the ACCME Standards for Integrity and Independence in Accredited Continuing Education, as directed by the Accreditation Specialist.
- Ensure that all individuals in a position to control activity content (e.g., planners, Faculty, facilitators, moderators, consultants, and reviewers) provide timely completion of the electronic Conflict of Interest Disclosure (COI) form.
- Implement strategies to mitigate conflicts of interest identified during the disclosure process, as directed by the Accreditation Specialist.

Planning committee members, including Leads, who are employees or owners of an ACCME-defined ineligible company will be excluded from participating in the activity. An ineligible company is one whose primary business is producing, marketing, selling, re-selling, or distributing healthcare products used by, or on, patients.

- Ensure that the activity content presents a fair and balanced view of diagnostic and therapeutic options:
  - Recommendations for patient care are based on current science, evidence, and clinical reasoning;
  - All scientific research referred to, reported, or used in support or justification of patient care recommendations conforms to the generally accepted standards of experimental design, data collection, analysis, and interpretation;
  - New and evolving topics for which there is a lower (or absent) evidence base are clearly identified as such within the education and individual presentations;
• The content avoids advocating for, or promoting, practices that are not, or not yet, adequately based on current science, evidence, and clinical reasoning; and
• The content excludes any advocacy for, or promotion of, unscientific approaches to diagnosis or therapy, or recommendations, treatment or manners of practicing healthcare that are determined to have risks or dangers that outweigh the benefits or are known to be ineffective in the treatment of patients.

• Ensure that all planners and Faculty comply with applicable policies and procedures throughout the planning, delivery, and evaluation of the educational activity, including federal laws governing the use of Protected Health Information (PHI) and intellectual property.
• Monitor delivery of educational content to ensure compliance with accreditation policies, taking appropriate action to address issues that arise (may be assigned to a designee).

Activity Planning, Delivery and Evaluation

• Identify a representative or designee who will serve as the point of contact or liaison with the Accreditation Specialist.
• Recruit and actively engage a Planning Committee that represents the activity target audience.
• Work collectively, using the UW–Madison ICEP Planning Application, to identify and document the professional practice gaps and educational needs of the healthcare team and/or members of the team to be addressed in the activity, obtain appropriate evidence to justify the gap, and develop measurable learning objectives that describe the intended activity outcomes.
• Incorporate adult learning principles and active learning strategies into the educational design of the activity that will achieve the intended outcomes and support learning by, for, and with the healthcare team.
• Recruit and secure qualified Faculty who will effectively deliver content that addresses the learning objectives documented in the Planning Application.
• Monitor the quality of the instructional process to ensure learning by, for, and with the healthcare team, and make improvements where needed.
• In collaboration with the activity Faculty, identify and/or develop appropriate learning materials designed to extend learning beyond the activity.
• Evaluate the activity and actively engage in the debrief process, in consultation with the Accreditation Specialist.
• Provide timely notification to the Accreditation Specialist of changes in activity scope and/or ability to meet deadlines.

Financial Support

• Develop the activity budget and provide guidance regarding faculty honoraria and any other expenses to be included in the activity.
• If desired, secure resources such as unrestricted educational grants, sponsorships, and exhibits.
  o Report all applications for funding to the Accreditation Specialist to ensure compliance with the ACCME Standards for Integrity and Independence in Accredited Continuing Education.
  o A signed Letter of Agreement (LOA) is required for all unrestricted educational grants received from ineligible companies. All LOAs must be signed by the grantor and reviewed by the Accreditation Specialist who is responsible for submitting the LOA to the appropriate UW–Madison signatory for review and signature. LOAs must be fully executed before the start of the activity.

Additional responsibilities for RSS Planning Committee Leads/Chairs:
• Ensure that the activity coordinator submits sessions for compliance check at least 72 hours (3 business days) in advance. Assist with communicating with faculty to ensure timely response to deadlines.
• Lead a mid-cycle series evaluation meeting with the planning committee.
• Attend the biennial RSS Renewal Workshop with the planning committee.
Additional Responsibilities for RSS Planning Committee Members:
- Participate in the mid-cycle series evaluation meeting with the planning committee.
- Participate in the biennial RSS Renewal Workshop with the planning committee.

Activity Coordinator/Project Manager*

- Comply with Joint Accreditation™ criteria and the ACCME Standards for Integrity and Independence in Accredited Continuing Education, as directed by the Accreditation Specialist.
- Serve as a member of the planning committee (if contributing to content).
- Facilitate the Conflict of Interest (COI) disclosure process and COI mitigation for planners and faculty.
- Assist the Planning Committee in choosing the venue and act as venue coordinator.
- Correspond with Faculty and act as the liaison between the Faculty, Planning Committee and Accreditation Specialist.
- Create the marketing plan and advertising materials.
- Ensure all marketing materials are reviewed and approved by the Accreditation Specialist for compliance with accreditation standards.
- Serve as the point of contact for the registration process.
- Collect handouts and other educational support materials to be shared with learners during the activity.

*If there is no Activity Coordinator/Project Manager specifically identified, the Planning Committee Lead, in consultation with the Accreditation Specialist, will determine how these responsibilities will be assigned. If assigned to the Accreditation Specialist, project management fees may be applied.

Additional Responsibilities for RSS Activity Coordinators:
- Submit sessions for compliance check at least 72 hours (3 business days) in advance.
- Participate in the mid-cycle series evaluation meeting with the planning committee.
- Participate in the biennial RSS Renewal Workshop with the planning committee.

UW-Madison ICEP Accreditation Specialist

- Oversee course development, implementation, evaluation, budget, and registration in compliance with the Joint Accreditation™ criteria and ACCME Standards for Integrity and Independence in Accredited Continuing Education.
- Review and provide constructive feedback on the UW–Madison ICEP Planning Application.
- Recommend appropriate learning formats, adult learning principles, instructional design methods and active learning strategies that lead to achievement of intended outcomes.
- Follow all UW–Madison ICEP Policies and Procedures and UW–Madison guidelines regarding purchasing and contracts. Review and maintain financial documents.
- Designate appropriate number of continuing education credits, based on activity content identified in the Planning Application and a detailed activity agenda.
- Document the processes used for measurement of outcomes and activity evaluation. Assist in evaluation data analysis and preparation of the evaluation summary.
- Review all promotional materials for compliance with Joint Accreditation™ criteria.
- Retain attendance records for 6 years.
- Respond to learner inquiries regarding continuing education credit.
- Address planner, faculty, and learner perceptions of enhanced professional effectiveness of accredited continuing education.
- Maintain all documents that support compliance with Joint Accreditation™ criteria.