

## **Instructions**

This is a guidance document for internal use only and is intended to define terms and services included in the budget template. Please meet with the activity planning committee to determine needs and then draft a budget estimate for anticipated services.

### **ICEP Service Costs**

#### **Accreditation Services**

Accreditation services are calculated using the ICEP Fee Structure for live activities and the ICEP Enduring Fee Structure for enduring activities. If the activity is blended (live and enduring) use the fee structure calculator that represents the majority of the content of the activity.

(e.g. 4 hour activity with 3 hours of accredited enduring content and 1 hour of accredited live content you should use the Enduring fee structure; or

4 hour in-person conference that has 1 hour of accredited pre-work (flipped classroom), you should use the Live fee structure)

Provide an explanation of the accreditation fees and other important details related to the calculation in the comments (e.g., Credits awarded AMA, ANCC and APA)

Accreditation Fees include consultation about active learning strategies, engaging the healthcare team, and agenda/program consultation, review and approval.

### **ICEP Project Management Services**

#### **Logistics for Live In-Person Activities**

List is not inclusive - other services may fit in the category. Edit the box to only include those services provided. Fees should be calculated on an estimate of the hours required to complete the work. An average hourly rate for Accreditation Specialists is \$100 per hour. Provide an explanation of the fees and other important details related to the calculation in the comments. (i.e. estimate based on three sessions, additional sessions will be charged \$150 per session) Agenda/program review and approval are an important part of accreditation compliance monitoring. This work is included in the accreditation fee. Content experts develop the agenda/program not accreditation specialists.

#### **Virtual Live Activities: Event Preparation and Technical Support**

List is not inclusive - other services may fit in the category. Edit the box to only include those services provided. Fees should be calculated on an estimate of the hours required to complete the work. An average hourly rate for Accreditation Specialists is \$100 per hour. Provide an explanation of the fees and other important details related to the calculation in the comments. (i.e. estimate based on three sessions, additional sessions will be charged \$150 per session) Agenda/program review and approval are an important part of accreditation compliance monitoring. This work is included in the accreditation fee. Content experts develop the agenda/program not accreditation specialists.

#### **Live Capture for Supplemental Materials**

List is not inclusive - other services may fit in the category. Edit the box to only include those services provided. This content is not accredited and availability should not be advertised prior to the activity start date. Learners who do not attend the live session are not able to earn credit by watching the recorded lectures. Fees should be calculated by estimating the hours required to complete the work. An average hourly rate for Accreditation Specialists is \$100 per hour. Provide an explanation of the fees and other important details related to the calculation in the comments. (e.g. estimate based on three sessions, additional sessions will be charged \$150 per session)

#### **Enduring Activities**

List is not inclusive - other services may fit in the category. Edit the box to only include those services provided. Fees should be calculated based on a reasonable estimate of the hours required to complete the work. An average hourly rate for Accreditation Specialists is \$100 per hour. Provide an explanation of the fees, services provided and other important details related to the calculation in the comments. (e.g. estimate based on three sessions, additional sessions will be charged \$150 per session)

The time needed for activity set up is informed by the complexity of the content that needs to be added to the course. If you need assistance determining these fees contact an instructional designer on the ICEP team.

Hosting fees are paid to OCPD to recover the cost of Ethos. Hosting fees in this category are calculated in the Enduring Fee Calculator and should be itemized in the budget so OCPD knows how much to charge during the financial close out process

### **Planning Committee/Faculty\* Communication and Support**

Everyone involved in the accredited activity must receive a faculty letter using the approved templates found in the ICEP CE Planner Learning Community. A template will be provided at no cost to the planning committee if they choose to distribute. A copy of each letter sent must be returned to the ICEP Accreditation Specialist to be kept in the activity file. Services that may be provided by the ICEP Accreditation Specialist in this category include but are not limited to:

- Prepare and send the faculty letters, this service is provided at reasonable fee.
- Manage travel logistics and complete expense reimbursements and/or honoraria payment

Fees should be calculated on an estimate of the hours required to complete the work. An average hourly rate for Accreditation Specialists is \$100 per hour. Provide an explanation of the fees and other important details related to the calculation in the comments.

\*Faculty: An inclusive term to mean planners, authors, speakers, reviewers and others who control the content of an accredited activity.

### **Commercial Support Management**

All un-restricted educational monetary and in-kind grant requests to Commercial Interests must be submitted with the full knowledge of the ICEP Accreditation Specialist. Grant applications and Letters of Agreement are reviewed by the Grants Contact in OCPD and the forwarded to the SMPH Dean's Office for signature. All grants must be fully executed BEFORE the start of the activity. If this step is not complete the funds or in-kind materials must be returned. Fees are listed in the budget.

### **Exhibitor Management**

Exhibitors may be in person; virtual through ethos only; or both. Fees charged to exhibitors are determined by the planning committees. Exhibitor prospectus **must** be reviewed and approved by the ICEP Accreditation Specialist prior to distribution. ICEP charges include:

- The online exhibitor registration portal is completed by OCPD staff - fees are paid to OCPD.
- Virtual exhibit set up is completed by OCPD staff and fees are paid to OCPD.
- Exhibitor coordination refers to setting up and managing exhibit space at a live conference venue.
- Exhibitor recruitment refers to creating the prospectus and managing the solicitation of exhibitors for the planning committee. ICEP does not provide contacts for potential exhibitors.

### **Marketing**

Marketing is a shared responsibility between ICEP and the planning committee. ICEP support varies based on the needs of the planning committee. 1. ICEP Accreditation Specialists **must** review and approve all marketing materials for compliance purposes. This review does not necessarily include feedback on design, unless there is interference with required accreditation information. 2. ICEP may provide assistance with distribution via the respective school's instance of Eloqua. 3. At the request of the planning committee, ICEP staff may arrange for purchase of email mailing services or print mailing lists from medical marketing list services vendors. All purchasing rules must be followed. Costs of these services and lists are passed back to the planning committee. ICEP staff may facilitate the development of print or online materials in consultation with the planning committee and Media Solutions, Digital Printing and Mailing Services. NPD provides a Digital Toolkit option for activities they are accrediting.

## **Evaluation**

Evaluation is required for all accredited activities. A standard evaluation means the planning committee uses the appropriate evaluation template with little variation. In most cases the Accreditation Specialist would be able to set up this evaluation in the ICEP Learning Portal independently. If additional consultation is needed to build the evaluation, it may be considered a complex evaluation.

## **Assessment**

Assessment(s) are required for accredited enduring activities and all activities awarding MOC Credit. A standard assessment means the planning committee uses the general guidance for writing application to practice multiple choice, single best answer questions with feedback. In most cases the Accreditation Specialist would be able to set up this assessment in the ICEP Learning Portal independently. If additional consultation is needed to build the assessment, it may be considered a complex assessment. Other factors to consider when determining fees:

- The use of pre/post tests or attitude assessment scales which require additional set up
- The request for consultation to design an assessment for research purposes.

## **Standard Registration Set Up**

Standard Registration Set Up includes a base fee and up to 3 discount or reduce fee options and/or up to 3 coupon codes. Note Early Bird discounts are consider coupons. - No charge

## **Complex Registration Set Up**

Complex Registration Set Up includes a base fee and more than 3 discount or reduce fee options and/or more than 3 coupon codes. Note Early Bird discounts are consider coupons.

## **Outside Registration System Use**

A planning committee may request using an alternate registration system (not Ethos). If this is requested, the ICEP Accreditation Specialist must ensure any messaging on the registration site meet ICEP policies and practices. This option requires building an instance in Ethos to allow for learn tracking. The fee for this option is \$300.00

## **Other**

List is not inclusive - other services may fit in the category. Edit the box to only include those services provided.

- Significant edits to the Activity Ethos instance after release or opening for registration. The purpose of this fee is to deter minor editing of public-facing information after release. \$150.