# Planning a CPD Event with Industry Sponsorship – Do’s and Don'ts

**This is a how-to guide for University of Ottawa Faculty members on how to plan a CPD/PD event requiring Industry sponsorship.**

## DO's

1. Read the uOttawa Faculty of Medicine's policy “[Interactions between the Faculty of Medicine and the Pharmaceutical, Biotechnology, Medical Device, and Hospital and Research Equipment and Supplies Industries](http://www.med.uottawa.ca/cme/assets/documents/FoM_Industry_Relations_Policy_EN.pdf), and the [Association of Faculties of Medicine of Canada’s](https://afmc.ca/about-afmc/our-committees) Standing Committee on Continuing Professional Development’s position paper on the role of Industry in University‐ based CPD/PD. For the purposes of this guide, “Industry rep” refers to all Industry employees involved with marketing, sales, administration, and research as well as medical communication companies employed by industry to liaise with physicians for CPD/PD event planning.
2. Identify a planning committee for the event with representatives from the target audience (i.e. those who will attend the event).
3. Review the needs of the target audience, develop learning objectives, select topics and learning formats, and choose speakers who will best deliver the content.
4. Create a budget for the program.
5. If financial support is needed for the venue and/or speaker expenses, approach an Industry sponsor – several sponsors is preferable so that one sponsor doesn’t necessarily identify with the organization or event. However, financial support may not be linked to or designated for a specific topic, speaker or activity (i.e. Tagging).
6. If funding is provided, this should be in the form of an education grant payable to the department/division organizing the event. Funds should never be paid directly to an individual faculty member. Any payment of event expenses should come directly from the education grant received by the department/division and no expense should be paid by Industry directly. Any financial support by Industry must be fully disclosed to the learners on course materials (signage, brochures, programs) and be limited to company names and logos without any specific product identified or referenced.
7. Meals should not be provided directly by the Industry sponsor. If refreshments are determined by the planning committee to be important to the event, then the physician organization managing the event may pay for refreshments as part of the event expenses.
8. If there are expenses other than venue and speaker expenses, consider a registration fee for the event to cover these extra expenses (such as for a more substantial meal).
9. Any CPD/PD event having Industry sponsorship and bearing uOttawa or Faculty of Medicine names or logos must be accredited by the Office of Continuing Professional Development. Accreditation forms may be accessed from the OCPD's website: [http://www.med.uottawa.ca/CME/eng/accreditation.html](http://www.med.uottawa.ca/cme/eng/accreditation.html)

Please note that Accreditation by OCPD is not required for events directly approved by the [Royal College of Physicians and Surgeons of Canada](http://www.royalcollege.ca/rcsite/cpd/accreditation-continuing-professional-development-cpd-activities-e) (i.e. Rounds or journal clubs) or for events accredited directly through the [College of Family Physicians of Canada](http://www.cfpc.ca/Introduction_to_Mainpro+/http:/www.cfpc.ca/Introduction_to_Mainpro+/).

1. Ensure that planning committee members and speakers disclose their conflicts of interest to other committee members and the participants of the event. Disclosure forms are available on the OCPD website.
2. Contact the Faculty of Medicine’s Office of CPD for additional help with your program: Email: [cpd@toh.on.ca](mailto:cpd@toh.on.ca)

## DON'Ts

1. Industry reps must not be part of the planning of the event which should be under the sole control of physicians and health care professionals.
2. Industry reps should not serve as educators at events unless their participation is mandatory to demonstrate a device or product that cannot be done by a physician or health care professional. This participation must be approved and rationalized by the members of the planning committee for the event.
3. In general, CPD/PD events are intended for physicians, trainees and health care professionals. The presence of Industry reps at the event may affect what or how content is delivered and therefore a general rule should be that Industry reps should not be present in the educational venue. If however, the physician organization identifies a benefit for Industry rep participation to the learners, then there should be an agreement that they will not take part in discussion unless their input is requested by the physician organizers.
4. Industry reps should not pay directly for any expenses – these should be drawn from the physician organization's account using the education grants.
5. Industry reps may have booths/displays outside or apart from the education venue.
6. Industry reps should not provide free gifts at events (pens, mugs, books) with the exception of: printed education materials that are not available publicly and are PAAB approved.
7. Students and residents should not participate in off campus events that are solely sponsored by Industry and do not follow uOttawa or CMA policies/guidelines. (Note: Off campus Specialty Society and other professional meetings are not included since they are developed by recognized physician organizations which accept Industry sponsorship according to CMA guidelines).
8. The CPD provider organization cannot schedule unaccredited CPD activities to take place at times and locations that interfere or compete with accredited CPD activities.
9. Unaccredited CPD activities cannot be listed or included within activity agendas programs or calendars of events (preliminary and final).