

Stanford Policy on Commercial Support of CME Activities: FAQs

GUIDING PRINCIPLE:

This policy is intended to insure that Stanford Continuing Medical Education (CME) activities are free from commercial influence, based upon the best scientific evidence available, and focused on improving physician competence, performance in practice or patient outcomes.

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COMMERCIAL SUPPORT:

- How is commercial support defined?
Commercial support is defined as financial, or in-kind, contributions given by a commercial interest, which is used to pay all or part of the costs of a CME activity.
- What constitutes a commercial interest in relation to CME?
A commercial interest is any entity producing, marketing, re-selling, or distributing health care goods or services consumed by, or used on, patients. Also included are professional conference organizers who receive financial support from a commercial entity to support CME activities.
- What type of CME activity is covered under this policy?
This policy applies to all ACCME accredited CME activity at Stanford. The term CME is used in this document to specifically indicate ACCME accredited activities. Accredited CME includes all courses and symposia as well as regularly scheduled series such as grand rounds, case conferences, M&Ms, tumor boards, journal clubs as well as enduring educational materials (e.g. websites, CDs, DVDs) for which ACCME accreditation is sought.
- What about non-accredited CME activities?
All non- accredited educational activities at Stanford School of Medicine are covered by the Stanford Industry Interactions Policy (SIIP) (<http://med.stanford.edu/coi/siip/>).
- What is the new policy on commercial support to Stanford CME?
Effective September 1, 2008, new direct commercial funding for specific CME courses or programs is not allowed. This includes both on and offsite venues and all functions that propose to use the Stanford name. This also includes payments from third party sources or for-profit course organizers that have received industry support.
- Does this policy inhibit Stanford faculty from participating in non-Stanford sponsored CME?
It is not the intention of this policy to constrain faculty participation in CME sponsored by other non-profit entities (e.g., activities sponsored by national organizations, educational institution, or government). In such cases, faculty may use their individual institutional affiliation. Faculty may undertake curriculum leadership roles in CME sponsored by non-profit entities so long as it relates to the ordinary mission of the sponsoring organization and could not be perceived as a relocation of educational activity that ought to be sponsored by Stanford.
- Can commercial entities still support Stanford continuing medical education?

Yes, the School recognizes that industry may wish to provide CME program support that is not designated to a specific subject, course or program but that is intended for use in a broadly defined field of study. Support from industry for accredited CME will be considered in the following general categories:

- Medical, pediatric and surgical specialties*
- Diagnostic and imaging technologies and disciplines*
- Health policy and disease prevention*
- Other broadly defined topic areas*

Such industry support cannot be designated for a specific course or program, but effort will be made to direct support, as appropriate, to the specified general areas of interest listed here. Industry support for accredited CME programs must be directed to the Stanford Center for CME.

▪ **Who makes requests to companies for commercial support?**

Requests for commercial support for accredited CME programs must be submitted to potential commercial supporters by the Center for CME. Faculty should work together with the CME staff to prepare commercial support requests. Proposals will need to be configured to address a broadly defined area of medical knowledge (e.g., quality improvement, disease prevention, health policy, innovative educational methods).

The policy covering request criteria for commercial support for non-accredited educational activities is described in the SIIP policy.

▪ **Who can sign letters of agreement for commercial support?**

All commercial support agreements for accredited CME activities must be executed by the Associate Dean for Continuing Medical Education or designees.

▪ **How do I apply for an allocation from the central commercial support pool?**

Application for resources is made to the CME faculty advisory council via a proposal describing the specific educational activity. The format for this is available from the Center for CME.

▪ **What is “in kind” support?**

“In kind” refers to the loan or donation of equipment or supplies as well as services from a commercial entity.

▪ **Can an accredited CME activity receive “in kind” support?**

Once a course has been accepted by the CME faculty advisory council, certain types of in kind support may be permitted, upon prior approval by the Associate Dean of CME, so long as no marketing activity is associated with their use. When there are multiple

products available, every effort must be made to ensure broad inclusion or use of possible equipment alternatives.

- Can commercial funds designated for CME later be used for other purposes?
Commercial funds contributed in support of Stanford CME must be expended exclusively on Stanford CME programs.
- Can unrestricted commercial donations to departments (or other school entities) be used to

support an accredited CME program?

The only commercial funds eligible for use in supporting accredited CME activities are those that have been specifically donated to the SOM CME pool as defined above and in the CME Commercial Support Policy.

- What types of support are permitted for specific CME activities?
Donations from individuals, foundations, and charitable organizations that have no commercial biases may be designated for support of a specific CME activity.
- How can we acknowledge commercial support?
Because directed commercial support is not permitted, a general statement listing all commercial supporters to the Stanford CME curriculum will be issued by the Center for CME on a regular basis.

COMMERCIAL EXHIBITS:

- Are commercial exhibits allowed?
Exhibits by commercial organizations are not permitted at CME activities whether at onsite or at off site locations.

COMMERCIAL INTERACTIONS RELATING TO CME ACTIVITIES:

- Can commercial employees assist in CME activities?
No, except in rare circumstances, this is not permitted. When a commercial employee is essential to operating a piece of equipment critical to the educational mission, upon prior approval by the Associate Dean of CME, this may be permitted with the proviso that no marketing activities are permitted. Special disclosures and appropriate monitoring by course leaders will be required.
- Can commercial employees serve as teachers in Stanford accredited CME courses?
No, except in rare circumstances, this is not permitted. Under rare exceptions, a commercial employee who possesses unique expertise not available otherwise may be

permitted to participate. This exception requires a compelling justification and prior written approval by the Associate Dean of CME. Special disclosures and appropriate monitoring by course leaders will be required.

- **Can industry representatives attend Stanford CME courses?**
Yes, but only for their own personal education. They must pay full tuition, wear a conference name badge, wear no commercial identifiers (e.g., corporate logos), and engage in no sales or promotional activity.
- **Use of company logos and slogans:**
All CME syllabi, brochures, course websites, lecture slides, etc. must be entirely free of commercial marketing or product messaging such as logos, slogans, etc.
- **Use of brand names during CME activities:**
Descriptive terminology rather than brand names for pharmaceuticals (i.e., generic chemical names) and medical technologies and devices should be employed. To avoid learner confusion, it is permissible to introduce a brand name in conjunction with its generic equivalent if this promotes learning.
- **Can Stanford CME activities be marketed on company websites?**
No. This is not permitted because it could be misunderstood to imply a relationship that does not exist.
- **Meals and entertainment:**
Meals and entertainment may accompany a CME activity, but commercial sponsorship is prohibited and commercial employees may not attend except as individual paid registrants in the course (see above).

ADMINISTRATION OF CME:

- **Are departments allowed to independently coordinate and manage accredited CME courses?**
No, effective September 1, 2008 all accredited CME activity is managed through the Stanford Center for CME.
- **Why must all accredited CME activities be administered by the Stanford Center for CME?**
Satisfying ACCME requirements for accreditation has become extremely complicated and time consuming and maintaining accreditation with a dispersed compliance program is problematic. Since the Center for CME bears the responsibility for CME and issuance of certification, it must administer the CME activities.

- When can the Stanford name be used in relation to a CME activity?
Only CME activities fully compliant with SOM commercial support policies and administered through the Stanford Center for CME may use the Stanford name. Permission to use the Stanford name for CME programs must be approved by the Stanford Center of CME.
- Can another accredited entity sponsor a Stanford CME activity?
No. All CME activities sponsored by Stanford SOM must use Stanford SOM as their accredited provider.
- Can Stanford CME activities be jointly sponsored?
Joint sponsorships with academic institutions and organizations will be considered on a case-by-case basis by the Associate Dean for CME. Potential partners must be willing to comply with our commercial support policies for the joint activity. Under no circumstances will joint sponsorships be considered for profit companies such as medical education companies (MECCs).
- How will decisions be made in terms of course curricula?
Proposals for courses must be submitted to the Stanford Center for CME by a faculty sponsor. All proposals will be reviewed by the Faculty CME Advisory Council, a representative body of Stanford SOM faculty. Decisions will be made based on identified practice gaps, quality indicators, strategic initiatives, innovative and novel learning techniques and/or targeted health outcomes.
- Who may serve as a Course Director?
For reasons of financial accountability and adherence to Stanford policies, Course Directors should be full-time faculty members employed by the Stanford School of Medicine. Non full-time faculty may be considered for leadership positions based on compelling need and prior approval by the Associate Dean for CME. Community practitioners with voluntary clinical appointments may participate as a course co-director in concert with a Stanford School of Medicine faculty member.

It is expected that Course Directors familiarize themselves with Stanford CME policies including: Commercial Support, Honorarium, Identification and Resolution of Conflicts of Interests and Venue. The CME staff and Associate Dean for CME are available to answer any questions regarding these policies.

DISCLOSING AND RESOLVING CONFLICTS OF INTEREST:

- What interests need to be disclosed?

- Financial relationships which are relevant to the specific CME content must be disclosed. These relationships include those of the individuals and their spouse or significant other that have occurred within the last 12 months, or are expected to continue.*
- For whom do we need to disclose such conflicts?
Clearly, the CME faculty, but also anyone else with influence over the CME content. This means that course planners (both faculty and staff) need to disclose as well.
 - When do we need to disclose potential conflicts of interest?
The conflict of interest disclosures for the CME planners must be transmitted to the Stanford Center for CME during the planning process. Disclosures from the entire CME program faculty are needed at least 30 days before the course.
 - How should reportable conflicts of interest be disclosed during the program?
Relevant financial relationships by faculty and planners must be disclosed to the learners prior to the activity.
 - What is meant by resolving a conflict of interest?
ACCME requires that potential conflicts be formally evaluated and resolved by course leadership. This should include pre-screening of course material for signs of commercial influence and revision if it is detected. Presentations by potentially conflicted faculty need to be routinely monitored for possible commercial influence. This monitoring must be conducted by a faculty member who has no similar conflict.
 - What is our responsibility if a member of the faculty is perceived to present commercially biased material?
If during an educational event, course leadership detects commercial influence, it is their responsibility to discuss this with the learners in order to ensure that a fair and balanced program is in place.

PROMOTION OF CME ACTIVITIES:

- In promoting CME activities, what venue information can be included (e.g. hotel, resort, conference center)?
Other than listing the name and location of the outside venue, as required for registration purposes, images or descriptions of the venue are not allowed. A venue website address may be included for learners to obtain additional information. Use of Stanford imagery in CME promotion is encouraged.
- Can marketing for CME activities contain tourist information?

Stanford CME marketing must focus exclusively on educational content. As such, promotional material may not include destination imagery (e.g. palm trees, the Golden Gate Bridge) or recreational activities (e.g. surfing, skiing). Images included in promotional material should be related to the course content.

- Can we begin to promote our planned CME activities (e.g. brochures, websites) whenever we want to?

With the exception of a “save the date” notice which includes no mention of CME credit, no promotion may occur until the course application has been approved for credit.

- Can faculty participate in the design and distribution of promotional material?

Yes, faculty involvement in the promotional process is encouraged. However, before distribution, all promotional materials must be approved by the CME office.

HONORARIA FOR CME ACTIVITIES:

- What are the CME rules concerning honoraria for non-Stanford course faculty?

Invited faculty may receive an honorarium in addition to covering all of their customary travel expenses (in accordance with Stanford guidelines). An honorarium of up to \$1000 per teaching day may be awarded up to a maximum of \$2000 per activity.

- What are the CME rules concerning honoraria for Stanford faculty?

Because Stanford faculty are already compensated for teaching as part of their salaries, honoraria may be justified only for exceptional effort. Provost rules limit honoraria for Stanford faculty to less than \$1000. Stanford faculty honoraria must be approved by the Associate Dean for CME and can only be paid after all other course expenses have been met.

- Can CME revenue support a Stanford faculty member’s salary?

Revenues derived from CME activities may be used to reimburse a faculty member’s department for time spent on CME only under exceptional circumstances. To be eligible, a sizable fraction of the faculty member’s teaching effort must be committed to CME. Departmental reimbursement for fractions of a Stanford faculty member’s salary must be approved by the Associate Dean for CME and can only be paid after all other course expenses have been met.

TIMELINE FOR IMPLEMENTATION OF THIS POLICY:

- When is this policy effective?

This policy is effective September 1, 2008. However, because CME course directors, faculty and departments may have existing contracts or agreements currently in hand, such previously signed contracts will be reviewed by the Stanford Center for CME and will be honored through June 1, 2008 as long as they are fully compliant with the policies of the ACCME and the School of Medicine. Understanding that some courses or contracts are made well in advance of the date they are held, this review and consideration will extend through June 1, 2009. Exceptional cases or arrangements will be examined on a case by case basis.

FURTHER QUESTIONS?

- Where should I direct my questions?

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