Regularly Scheduled Series Planning Process

The abbreviated planning grid below gives you a quick overview of the process and timeline. Subsequent pages provide additional details about each phase.

<table>
<thead>
<tr>
<th>Phase Description</th>
<th>Timeline</th>
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<tbody>
<tr>
<td><strong>Phase 1 – Consultation on Proposed Regularly Scheduled Series (RSS)</strong></td>
<td>6 - 9 months prior to September 1 (the beginning of fiscal year)</td>
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<tr>
<td>Initial consultation and collaborative assessment of new series to determine if request is in alignment with SCCME mission:</td>
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<tr>
<td>- Clarify series objective</td>
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<tr>
<td>- Review of six phase cycle of planning</td>
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<tr>
<td>- Review roles and responsibilities</td>
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<tr>
<td>- Financial backstop</td>
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<tr>
<td>- Determine go/no go decision</td>
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<tr>
<td><strong>Phase 2 – RSS Pre-Planning</strong></td>
<td>3-5 months prior to September 1</td>
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<tr>
<td>Establish the basic structure of the activity:</td>
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<tr>
<td>- Identify Primary Course Director and Planning Committee</td>
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<td>- Designate a Departmental Coordinator</td>
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<td>- Establish frequency, day, time and location</td>
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<tr>
<td>- Gather Primary Course Director and planner documents and resolve financial conflicts</td>
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<tr>
<td><strong>Phase 3 – RSS Planning</strong></td>
<td>2-3 months prior to September 1</td>
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<tr>
<td>The CME Application facilitates and documents the planning process by addressing elements that are both helpful and required by our accrediting body (ACCME):</td>
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<tr>
<td>- Review application components</td>
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<tr>
<td>- Identify professional practice gaps that exist between current and best practices</td>
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<tr>
<td>- Develop agenda (at least 1st quarter)</td>
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<tr>
<td>- Develop budget and receive financial approval from Department Chair</td>
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<tr>
<td>- Identify potential speakers/faculty for the sessions</td>
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</table>
# Regularly Scheduled Series Planning Process

## Phase 4 – RSS Approval

In this phase, the CME Application is reviewed/modified and given final approval:

- Approve CME Application
- Introduce departmental roles and responsibilities through individualized training

### 1-2 months prior to September 1

## Phase 5 - Session Preparation and Delivery

### Session Preparation:

- Establish list of learners for barcoded sign in sheet
- Collect Speaker and Moderator financial disclosure and attestation forms
- Ensure receipt of all faculty documentation and resolution of conflicts of interest
- Collect session objectives from speaker(s)
- Determine honorarium and document accordingly
- Create session flyer
- Complete disclosure to learners document
- Promote session to appropriate audience

### Session Delivery:

- Post session flyer for the learners
- Post disclosure to learners document
- Display barcoded sign in sheets
- SCCME conducts evaluations quarterly or more frequently if appropriate

### 1 month prior to the first session and ongoing throughout the fiscal year

## Phase 6 - Post Session Activity and Annual Report

### Departmental Coordinator:

- Send post-session documentation packet to SCCME within 7 days of the session
- Send completed Annual Report to CME RSS Coordinator within one month of the last session

### CME RSS Coordinator:

- Ensure all session documents are compliant with ACCME criteria
- Send evaluation summaries to Primary Course Director quarterly
- Respond to inquiries regarding RSS credit and send transcripts upon request

### Post session: 7 days after each session

### Annual Report: Within one month of the last session
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Phase 1 - Consultation on Proposed RSS Activity

Contact the Stanford Center for Continuing Medical Education (SCCME) at least 6-9 months in advance of the beginning of the new fiscal year to ensure the necessary time to discuss the RSS concept and its planning and approval.

The SCCME evaluates new RSS proposals to make sure that they are consistent with the Center’s mission. The Center must also ensure there are sufficient resources to support the RSS activity and the Stanford Department/Institute/Division requesting the continuing medical education (CME) activity is prepared to financially backstop the series. The consultation results in a collaborative decision regarding the appropriateness of the concept for certified continuing medical education.

Key tasks include:
- Clarify series objective
- Review of six phase cycle of planning
- Review roles and responsibilities
- Financial backstop
- Determine go/no go decision

Phase 2 – RSS Pre-Planning

In this phase, a Primary Course Director (a Stanford School of Medicine physician faculty member) is identified. The Primary Course Director establishes a Planning Committee and coordinates the activity planning process with the support of the CME RSS Coordinator. More than one planner is recommended and required if the Primary Course Director has a conflict of interest relevant to the subject matter of the RSS. These planners will be responsible for completing the SCCME RSS Application/Planning Worksheet (“CME Application”) in Phase 3. A Stanford Center for CME RSS Coordinator will be assigned to each RSS to facilitate and assist with the planning, implementation and monitoring process.

A Departmental Coordinator is designated by the Primary Course Director. The Departmental Coordinator is responsible for the operational/departmental support of the RSS. The time commitment required of the Departmental Coordinator is dependent upon the type of RSS, its frequency, and the experience of the individual.

Key tasks include:
- Identify Primary Course Director and Planning Committee
- Designate a Departmental Coordinator
- Establish frequency, day, time and location
- Gather Primary Course Director and planner documents and resolve financial conflicts
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**Phase 3 – RSS Planning**

RSS planning is the responsibility of the Primary Course Director and the Planning Committee and includes identifying professional practice gaps that exist between current and best practices and determining the educational content that will address those gaps. During this phase, speakers and topics are selected (at least for the first quarter) as well as the most appropriate educational format, learning objectives and educational outcomes measurement methods for the RSS activity. Sessions and topics for the remainder of the year are identified as the year continues.

The SCCME RSS Application/Planning Worksheet (“CME Application”) is the primary vehicle used to facilitate and document the planning process so that all important activity elements are addressed and Accreditation Council for Continuing Medical Education (ACCME) regulatory requirements are met.

CME Applications must be approved prior to promotion of a CME activity.

Key tasks include:
- Review application components
- Identify professional practice gaps that exist between current and best practices
- Develop agenda (at least 1st quarter)
- Develop budget and receive financial approval from Department Chair
- Identify potential speakers/faculty for the sessions

**Phase 4 – RSS Approval**

In this phase, SCCME staff review the CME application, note necessary additions or modifications, and work with the Primary Course Director on supplementing the application with missing information. Once fully complete, the application is sent for final accreditation review. If no additional modifications are required, the CME Application and supporting documentation are sent to the Associate Dean for Postgraduate Medical Education for final approval.

While waiting for final approval, the CME RSS Coordinator meets with the Departmental Coordinator to provide individualized training that includes reviewing session templates and required documentation. In Phase 5, the CME RSS Coordinator will work with the Departmental Coordinator to walkthrough their first session to demonstrate what must be accomplished and provide appropriate feedback.

Key tasks include:
- Approve of CME Application
- Introduce departmental roles and responsibilities through individualized training
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Phase 5 - Session Preparation and Delivery

Session Preparation:

In this phase, a list of learners is created for the barcoded sign in sheet based on departmental faculty. All Speaker and Moderator disclosure and attestation forms, as well as session objectives, must be received and reviewed prior to each session. Should any faculty member have a conflict of interest, a non-conflicted physician Primary Course Director, or his/her appointee, must resolve that conflict. Typically this is done by reviewing the faculty member’s presentation and requesting edits as necessary. A Resolution of Conflicts form also needs to be completed. In addition, an honorarium is determined and documented accordingly. The session flyer and disclosure to learner document are created/completed by the Departmental Coordinator. The session is then promoted to an appropriate audience. All session documents are sent to the CME RSS Coordinator for review (at least for the 1st session).

Session Delivery:

At each session, the session flyer is posted for the learners. The disclosure to learners form is also posted along with the barcoded sign in sheets. The CME RSS Coordinator develops, distributes, collects and analyzes evaluations quarterly or more frequently if appropriate.

Key tasks include:

Session Preparation:
- Establish list of learners for barcoded sign in sheet
- Collect Speaker and Moderator financial disclosure and attestation forms
- Ensure receipt of all faculty documentation and resolution of conflicts of interest
- Collect session objectives from speaker(s)
- Determine honorarium and document accordingly
- Create session flyer
- Complete disclosure to learners document
- Promote session to appropriate audience

Session Delivery:
- Post session flyer for the learners
- Post disclosure to learners document
- Display barcoded sign in sheets
- SCCME conducts evaluations quarterly or more frequently if appropriate
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**Phase 6 - Post Session Activity and Annual Report**

After the session has been completed, the Departmental Coordinator sends all required post session documentation to the CME RSS Coordinator within 7 days of each session. The CME RSS Coordinator will work with the Departmental Coordinator to ensure that the documents for each session are compliant with the ACCME criteria.

After the last session has ended, the CME RSS Coordinator sends compiled evaluation data to the Primary Course Director. Based on this data, the Course Director completes an Annual Report addressing changes made to the RSS during the year and any planned changes for the next fiscal year. This report also includes the effectiveness of the RSS in meeting its objectives (competence, performance), quality items that were addressed, ancillary tools distributed to support learning, and the final budget. This process facilitates the needs assessment for the upcoming year.

**Departmental Coordinator:**
- Send post-session documentation packet to SCCME within 7 days of the session
- Send completed Annual Report to CME RSS Coordinator within one month of the last session

**CME RSS Coordinator:**
- Ensure all session documents are compliant with ACCME criteria
- Send evaluation summaries to Primary Course Director quarterly
- Respond to inquiries regarding RSS credit and send transcripts upon request