

20th Annual Conference of the National Task Force
on CME Provider/Industry Collaboration

LEARNING FROM THE PAST

Planning for the Future

BALTIMORE

Baltimore Marriott Waterfront - Baltimore, MD

October 14 - 16, 2009

CONFERENCE PROGRAM & REGISTRATION

20th Annual Conference of the National Task Force on CME Provider/Industry Collaboration

WEDNESDAY, OCTOBER 14

10:00 am – 6:00 pm **Registration Open**

1:00 pm – 5:00 pm **CME Collaboration Fundamentals Pre-Conference**

The Pre-Conference is intended for those who desire to improve knowledge and skills in the area of collaboration. While some time will be spent on basic background issues involving collaboration, the primary objective of the Pre-Conference is to translate knowledge into improved partnering and collaboration competencies.

Pre-Conference Chairs: Jack R. Kues, PhD, University of Cincinnati
George Mejicano, MD, MS, University of Wisconsin, School of Medicine and Public Health

1:00 pm - 1:05 pm **Welcome**

Melinda Steele, MEd, CCMEP, Texas Tech University Health Sciences Center, Conference Chair
Jeanne Floyd, PhD, American Nurses Credentialing Center, Conference Co-chair

1:05 pm - 1:45 pm **Collaboration and collaborators:
New potential for a new CME environment**

An overview of traditional CME partnerships and a range of potential new partnerships will be introduced, as well as strategies for assessing strengths and value for individual partners and the “value-added” for collaborations.
Moderator: Jack R. Kues, PhD

1:45 pm - 2:00 pm **Break**

2:00 pm - 3:00 pm **Successful Collaborations**

Three examples of successful collaborations will be discussed, including why collaborations were formed, how they were managed, and how they were able to achieve success beyond what they would have been able to accomplish alone.
Moderator: George Mejicano, MD, MS

3:00 pm - 3:15 pm **Break**

3:15 pm - 4:45 pm **Building Collaborations Workshop**

Participants will be assigned roles and resources to address a set of tasks, and complete a complex CME program with their team. Each team will present their program to the audience.

4:45 pm - 5:00 pm **Wrap-Up: Reflection and Self-Assessment**

6:30 pm - 8:00 pm **Opening Reception / 20th Anniversary Celebration and Exhibits**
(All Conference Attendees Invited)

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THURSDAY, OCTOBER 15

- 7:00 am – 8:00 am** **Continental Breakfast and Exhibits**
- 7:00 am – 3:30 pm** **Registration Open**
- 8:00 am – 8:15 am** **Welcome and Introductory Remarks**
Alejandro Aparicio, MD, FACP, American Medical Association; National Task Force Chair
Melinda Steele, MEd, CCMEP, Texas Tech University Health Sciences Center, Conference Chair
Jeanne Floyd, PhD, American Nurses Credentialing Center, Conference Co-chair
- 8:15 am – 9:15 am** **Keynote Address - Adaptation, Evolution, and Reinvention: A Decade of Change in CME**
Faculty: George Mejicano, MD, MS, University of Wisconsin School of Medicine and Public Health
- 9:15 am – 10:30 am** **Politics, Transparency, Costs, CME, and the Health Care Reform Update**
This session will focus on CME amid the Washington debates on conflict of interest, patient care and health care reform. Panelists will discuss emerging legislation including the Physician Payment Sunshine Act, reports by important health organization, and developments at HHS and FDA and their potential effect on the CME enterprise.
Moderator: John F. Kamp, PhD, JD, Coalition for Healthcare Communication
- 10:30 am – 11:00 am** **Break in Exhibit Hall**
- 11:00 am – 12:30 pm** **Communities of Practice Breakouts**
These sessions will allow participants to network around topics of interest with others from their area of practice.
- *Academic Medical Centers*
 - *Accredited Medical Education and Communication Companies*
 - *Non-Accredited Medical Education and Communication Companies*
 - *Hospitals and Intrastate Accredited Providers*
 - *Medical Specialty Societies*
 - *Pharmaceutical/Biotech/Medical Device Companies*
- 12:30 pm – 1:45 pm** **Lunch**
- 1:45 pm – 3:00 pm** **Beyond the Tipping Point: Future Options for Commercial Support Funding**
Taking up the recent IOM call for a review of funding options for CME, this interactive session will discuss various options for the commercial support component of that call to action. Panelists will offer their perspective on options ranging from eliminating commercial support to various pooled funding strategies while gathering opinion data from the audience using audience response technology that might help inform the national debate. Panelists will represent the perspectives of Academic Medical Centers, National Medical Specialty Societies, state level providers, and commercial supporters.
- Panelists: Robert Addleton, EdD, LCP, CCMEP, Physicians' Institute for Excellence in Medicine (representing state level providers)
Norman B. Kahn, Jr., MD, Council of Medical Specialty Societies (representing National Medical Specialty Societies)
Jack R. Kues, PhD (representing Academic Medical Centers)
Bernard Lo, MD, Chair of the Institute of Medicine Conflict of Interest in Medical Research, Education and Practice Committee
Michael S. Saxton, MEd, FACME, Pfizer Inc. (representing commercial supporters)
- 3:00 pm – 3:30 pm** **Break in Exhibit Hall**

3:30 pm – 5:00 pm Working Together Within the Guidelines: Interactive Case Studies
Panelists representing the perspectives of ACCME, AMA CEJA, FDA, OIG, and PhRMA will address specific cases related to compliance while interacting with conference participants through the use of an audience response system.

Moderators: Sue Ann Capizzi, MBA, FACME, American Medical Association
Marty Cearnal, JMI

Faculty: Wendy C. Goldstein, Esq., EpsteinBeckerGreen (responding to PhRMA guidelines)
Greer Lautrup, JD, Sidley Austin LLP (responding to OIG guidelines)
John "Jack" McMahon, MD, American Medical Association Council on Ethical and Judicial Affairs
Danna Muir, MBA, Massachusetts Medical Society (responding to ACCME guidelines)
Janet L. "Lucy" Rose, PA-C, MBA, Lucy Rose & Associates, LLC (responding to FDA guidelines)

5:30 pm – 7:00 pm Reception and Exhibits

FRIDAY, OCTOBER 16

7:00 am – 8:00 am Continental Breakfast and Exhibits

7:30 am – 10:30 am Registration Open

8:00 am – 9:00 am Shickman Lecture - Science, Religion and the Case of Vanessa Young

There are any number of ways to view the issue of conflict of interest. One, the 'scientific' attempts to produce evidence for influence of bias; another, 'religious' perspective is more dogmatic and holds that industry support of CME is inherently right or wrong. There is another view, however - that of the patient - which is probably the most important. These three views will be examined from a historical perspective - looking back to plan ahead.

Faculty: Dave Davis, MD, Association of American Medical Colleges

9:00 am – 10:00 am ACCME Update: Accredited CME as a Strategic Asset and a Bridge to Quality

This session will describe recent updates and actions related to accreditation and their impact on CME providers, supporters and others. Issues will include conflict of interest and bias, the recent Call for Comments, actions of the ACCME Board, and other items of interest.

Faculty: Murray Kopelow, MD, MS, FRCPC, Accreditation Council for Continuing Medical Education

10:00 am – 10:30 am Break in Exhibit Hall

10:30 am – 11:45 am Concurrent Breakout Sessions #1

1. Code of Ethics for CME Professionals

This session brings together several drafts of codes of ethics for CME professionals. An initial session exploring a code of ethics for CME was part of this conference last year. A follow-up session was held at the Alliance for CME's Annual Conference in 2009. The data from these two sessions, along with similar documents developed by NAAMECC and the Alliance for CME form the basis for the presentation of a draft Code of Professional Ethics for CME. Several sections of the draft code will be discussed during this session in an effort to help finalize a professional code that fairly defines the responsibilities and appropriate behavior for CME professionals.

Faculty: Jann Balmer, PhD, University of Virginia School of Medicine
Jack R. Kues, PhD, University of Cincinnati
Paul Weber, MA, Alliance for Continuing Medical Education

2. Commercial Supporter Perspective: Grant Applications

A panel of industry experts will discuss issues affecting the changing dynamics of commercial support of IME/CME activities, with a particular focus on new procedures, legal & regulatory requirements, emerging business models of providers, appropriate communications, integration of ACCME criteria into applications and educational activities in the context of maintenance of certification, maintenance of licensure, quality improvement and practice improvement.

Moderator: Pamela L. Mason, FACME, CCMEP, AstraZeneca

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3. *From Needs Assessment to Patient Outcomes: How to use Technology and Partnership for Performance Improvement*

This panel presentation and discussion will address the use of technological aids and systems of collaboration that enhance the ability of CME Providers to offer Performance Improvement CME that makes a difference. Perspectives will be offered from a CME Provider, a commercial supporter, and an outcomes technology company. The session will utilize presentations, a case study, and small group discussion.

Moderator: Linda Klein, BSN, MS, Klein & Company, Inc.

Faculty: Robert Addleton, EdD, LCP, CCMEP, Physicians' Institute for Excellence in Medicine
Michael Crawford, Educational Measures, LLC
Gretchen Keefer, OPTimize Study Coordinator
Brian McGowan, PhD, CCMEP, Wyeth Pharmaceuticals

4. *Interprofessional Collaborations in CME*

Several accredited CME providers will share stories about their provision of continuing education to interprofessional healthcare audiences. Find out why and how they do this, as well as evaluate potential benefits to your organization and those you serve. Information will be shared on why the AANC, ACCME and ACPE have chosen to collaborate in encouraging interprofessional continuing education. The way these agencies will work with providers committed to CE "by the team, for the team" will be discussed.

Moderator: Norman B. Kahn, Jr., MD, Council of Medical Specialty Societies

Faculty: CAPT Luke & Sylvia K. Scherr, MS, RN, Uniformed Services University of the Health Sciences
Victoria Street, National Committee for Quality Assurance
Peter H. Vlasses, PharmD, BCPS, FCCP, Accreditation Council for Pharmacy Education

5. *What Happens When You Don't Get the Funding?*

To address an identified clinical gap, several organizations came together to plan a series of CME activities. Staff members then wrote a proposal that outlined what the organizations intended to do in order to deliver and evaluate the educational initiatives needed to close the clinical gap. The proposal was submitted and approved by two commercial supporters but at a funding level that was far less than the amount needed to execute what the organizations had planned. What to do? This session will address the ethical, legal, practical, and political issues related to scenarios like this (i.e., when the funding obtained is less than the funding sought).

Faculty: Ed Dellert, RN, MBA, American College of Chest Physicians
Walter Fox, MS, Ortho McNeil Janssen Scientific Affairs
Karen Overstreet, EdD, RPh, FACME, Indicia Medical Education

6. *When and How to React to the Environment of "Lions and Tigers and Bears" -*

Practical Implications of the Latest Public Statements About Commercial Support of CME

In today's rapidly evolving environment where positions about commercial support of CME appear with increasing frequency as blogs, lay press articles, professional journal opinion pieces, guidelines, regulations and law, providers and commercial supporters are challenged to know what constitutes an influential statement that should inform policy and procedures. Facilitated from a provider's perspective, this breakout will review examples of position statements and reflect on the practical issues of whether and how to adopt them in daily practice or reserve them for future planning discussions. A panel of providers and commercial supporters will serve as a resource panel to this session.

11:45 am – 1:15 pm Lunch

1:15 pm – 2:30 pm Concurrent Breakout Sessions #2 (Repeated from the morning)

2:30 pm – 3:00 pm Break in Exhibit Hall

3:00 pm – 4:00 pm Issues and Updates Related to the Institute of Medicine Conflict of Interest in Medical Research, Education and Practice Committee Report

This session will explore the current environment and changes taking place as a result of the IOM COI report. Format will include a presentation from Dr. Lo, as well as an opportunity for audience interaction.

Faculty: Bernard Lo, MD, Chair of the Institute of Medicine Conflict of Interest in Medical Research, Education and Practice Committee

4:00 pm – 4:15 pm Closing Remarks

CONFERENCE CONCLUDED

GENERAL INFORMATION

ON LINE REGISTRATION

www.ama-assn.org/go/cmetaskforce

MAIL

Mail registration page with payment to:

American Medical Association
Attn: National Task Force Conference
515 North State Street
Chicago, IL 60654

FAX (CREDIT CARD PAYMENTS ONLY)

Fax registration page to: 312-464-5830

Attn: National Task Force Conference

ONSITE (BASED ON SPACE AVAILABLE)

Wednesday, October 14, 2009 (10:00 am - 6:00 pm)

Thursday, October 15, 2009 (7:00 am - 3:30 pm)

Friday, October 16, 2009 (7:30 am - 10:30 am)

REGISTRATION FEES

REGISTRATION FEES BEFORE AUGUST 28, 2009

\$215 Pre-Conference Only
(Wednesday, 10/14/09)

\$710 Conference
(Thursday, 10/15/09 - Friday, 10/16/09)

\$870 Pre-Conference & Conference
(Wednesday, 10/14/09 - Friday, 10/16/09)

REGISTRATION FEES AFTER AUGUST 28, 2009

\$230 Pre-Conference Only
(Wednesday, 10/14/09)

\$810 Conference
(Thursday, 10/15/09 - Friday, 10/16/09)

\$970 Pre-Conference & Conference
(Wednesday, 10/14/09 - Friday, 10/16/09)

HOTEL ACCOMMODATIONS

The 20th Annual Conference of the National Task Force on CME Provider Industry Collaboration will be held at:

Baltimore Marriott Waterfront
700 Aliceanna Street
Baltimore, MD 21202

Reservations can be secured online at www.ama-assn.org/go/cmetaskforce, or by calling 410-385-3000 or toll-free 800-228-9290. Hotel reservations must be made by September 18 to secure the group rate of \$245 plus taxes. For call-in reservations, mention that you are attending the National Task Force Conference to receive our discounted group rate. Rooms are subject to availability and early reservations are advised.

GROUP DISCOUNTS:

Register three participants from the same organization and receive a \$150 discount on each additional registration. The enclosed registration form should be completed for all four (or more) registrants, and faxed/mailed at the same time to receive the discount. Registrations for group discounts cannot be completed online.

DRESS CODE

Dress for all sessions is business casual.

SPECIAL NEEDS

In accordance with the Americans with Disabilities Act, the National Task Force on CME Provider/Industry Collaboration seeks to make this conference accessible to all. If you have a disability which might require special accommodations, please contact us at 312-464-5196.

CANCELLATION POLICY

Registrants needing to cancel before September 18, 2009 are entitled to a full refund less a \$50 processing charge. Cancellations must be made in writing and can be addressed to cmetaskforce@ama-assn.org. No refunds will be made for cancellations received after September 18, 2009.

Attendee Information

Name/Degree(s)

Title

Organization

Preferred Address

City State Zip Code

Office Phone Number

E-mail Address

Emergency Contact Phone

Please do not print my contact information in the participant roster handed out onsite.

Please add me to the CPPD email list.

PAYMENT

Registration fees before August 28, 2009

- \$215 Pre-Conference Only
- \$710 Conference
- \$870 Pre-Conference & Conference

Registration fees after August 28, 2009

- \$230 Pre-Conference Only
- \$810 Conference
- \$970 Pre-Conference & Conference

METHOD OF PAYMENT:

American Express Visa Mastercard

Name as it appears on credit card

Credit Card # Exp. Date

CCV (CID) value (from back of card)

Signature

Billing Address

Billing City, State, Zip

Mail this page with payment to:

American Medical Association
Attn: National Task Force Conference
515 North State Street
Chicago, Illinois 60654

Fax (credit card payments only) to: 312-464-5830
Attn: National Task Force Conference

Session Selection

Check only the boxes of those sessions which you will attend.

COMMUNITIES OF PRACTICE

- Academic Medical Centers
- Accredited Medical Education and Communication Companies
- Non-Accredited Medical Education and Communication Companies
- Hospital and Intrastate Providers
- Medical Specialty Societies
- Pharmaceutical/Biotech/Medical Device Companies

CONCURRENT BREAKOUT SESSIONS

Please register for one session during each time slot.

Friday, October 16, 2009

Breakout Session #1: 10:30 am – 11:45 am

- Code of Ethics for CME Professionals
- Commercial Supporter Perspective: Grant Applications
- From Needs Assessment to Patient Outcomes: How to use Technology and Partnership for Performance Improvement
- Interprofessional Collaborations in CME
- What Happens When You Don't Get the Funding?
- When and How to React to the Environment of "Lions and Tigers and Bears" - Practical Implications of the Latest Public Statements About Commercial Support of CME

Breakout Session #2: 1:15 pm – 2:30 pm

- Code of Ethics for CME Professionals
- Commercial Supporter Perspective: Grant Applications
- From Needs Assessment to Patient Outcomes: How to use Technology and Partnership for Performance Improvement
- Interprofessional Collaborations in CME
- What Happens When You Don't Get the Funding?
- When and How to React to the Environment of "Lions and Tigers and Bears" - Practical Implications of the Latest Public Statements About Commercial Support of CME

What type of organization do you represent?

- Biotech Company
- Government
- Accredited Medical Education & Communication Company
- Non-Accredited Medical Education & Communication Company
- Hospital or Healthcare System
- Medical Device Company
- Medical School
- Medical Specialty Society
- Pharmaceutical Company
- Insurance Company
- Healthcare Association
- State Medical Society
- Other: _____

How did you hear about the conference?

- Save the Date Postcard
- Conference Brochure
- AMA Website
- CPPD Report Newsletter
- Ad in Medical Meetings Magazine
- Ad in PharmaVOICE
- E-mail
- Alliance Almanac
- Word of mouth
- Another Conference (please list) _____
- Other: _____

Attendance History

- This is my first time attending.
- I have attended in the past.

20th Annual Conference of the National Task Force on CME Provider/Industry Collaboration

CME professionals who attend this conference will be able to:

- Differentiate among the guidelines from regulatory and accrediting agencies (including the ACCME, AMA, CEJA, FDA, OIG, and PhRMA) and identify strategies for compliance
- Evaluate the relationship among industry, CME and regulatory stakeholders and discuss implications for collaboration in the current environment
- Explore progresses in CME provider/industry collaboration, including those related to commercial support and funding of CME, online grant applications, and technology innovations
- Discuss examples of successful collaboration and apply them to your own practice
- Discuss current trends in the industry support of CME and evaluate their potential impact on CME and collaboration

CME professionals who attend this Pre-Conference will be able to:

- Develop quality educational activities through effective collaborations with educational partners
- Assess organizational resources that are valuable in educational collaborations
- Assess potential collaboration partners based on resources and shared values
- Identify important boundary issues and identify regulatory and professional standards, regulations, and guidance that address these issues
- Formulate a personal and organizational action plan around collaboration

A SPECIAL THANKS TO THE PLANNING COMMITTEE:

Melinda Steele, MEd, CCMEP (Chair)
Texas Tech University Health Sciences Center

Jeanne Floyd, PhD (Co-Chair)
American Nurses Credentialing Center

Alejandro Aparicio, MD, FACP
American Medical Association

Winnie E. Brown, MPA, CPMSM, CCMEP
Research Medical Center

Diane Burkhart, PhD
American Osteopathic Association

Sue Ann Capizzi, MBA, FACME
American Medical Association

Martin E. Cearnal
Jobson Medical Education, LLC

Maureen Doyle-Scharff, MBA
Pfizer, Inc.

Norman B. Kahn, Jr., MD
Council of Medical Specialty Societies

John Kamp, PhD, JD
Coalition for Healthcare Communication

Linda K. Klein, BSN, MS
Klein & Company, Inc.

Jack R. Kues, PhD
University of Cincinnati

Pamela L. Mason, FACME, CCMEP
AstraZeneca

George C. Mejicano, MD, MS
University of Wisconsin School of Medicine
and Public Health

Michael S. Saxton, MEd, FACME
Pfizer Inc.

Peter H. Vlasses, PharmD, BCPS, FCCP
Accreditation Council for Pharmacy Education