

**CPD OFFICE ACCREDITATION AND EDUCATIONAL PLANNING**

Approval Authority: CPD OFFICE Governance Committee

Established On: 2019 11

Amendments: 2025 09

Category: Continuing Education & Professional Development

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**1.0 POLICY STATEMENT**

CPD OFFICE Accreditation and Educational Planning exists to provide guidance for staff, faculty, preceptors, scientific planning committee members, and co-developing organizations on the approach used in the design and development of CPD educational programs.

**2.0 SCOPE**

To guide its educational processes in alignment with accreditation standards, CPD planning uses an instructional design process that follows the ADDIE Model (an acronym referring to the major stages in the generic instructional systems development process):

- Analysis
- Design
- Development
- Implementation
- Evaluation

The philosophy of CPD is to support its learners to move from novice to expert, be grounded in lifelong learning, embody the CanMEDS/CanMEDS FM roles and competencies, and conduct research.

**3.0 DEFINITIONS****Balance:**

The content and materials provided by speakers should provide (where applicable) a balanced view across all relevant options related to the content area. Content must be based on scientific evidence and free of sponsor influence. Description of therapeutic options must utilize generic names and not reflect exclusivity and product branding. In those circumstances where there is only one product or drug, a fair assessment must be presented to learners.

**Interactivity:**

The learning delivery/format must align with the learning needs and program objectives. The RCPSC and CFPC accreditation require a minimum of 25% of the total education time of each session to be allocated for interactive learning.

**Learning Objectives:**

The SPC must determine the overall program learning objectives, select the speakers, and determine the content and format for individual sessions in collaboration with the speakers. Program learning

objectives are brief statements that articulate what participants will learn, which may confirm or change practice because of their participation in the activity. The objectives must be developed without sponsor influence. They are useful in helping participants choose the appropriate programs for their learning needs. The program objectives are also helpful for speakers as they will help clarify the content to include in their session, and to establish a framework for evaluating effectiveness and outcomes. Each session should have specific learning objectives.

**Needs Assessment:**

A learning need is defined as the gap between a learner's current knowledge, skills, and/or attitudes and their competency relative to current evidence or clinical practice standards. Learning needs can be perceived (I know what I need to know') and unperceived (I don't know what I don't know'). SPCs are strongly encouraged to use multiple sources of information to inform the needs assessment.

**4.0 POLICY TERMS OR PROCEDURES**

Where an educational activity has received sponsorship, the planning committee must ensure that the sponsors have no influence on the content, design or delivery of the activity. Similarly, the planning committee is responsible for reviewing the COI declaration forms of all SPC members and speakers to ensure that any affiliations noted are discussed and a mitigation strategy is developed to ensure that the affiliations do not create bias in the program content, design or delivery.

CPD providers may not co-develop with ineligible organizations (Healthcare Pharmaceutical Industry (HPI) and Marketing organizations) to deliver certified activities. Ineligible organizations may assist with logistics, but ineligible organizations may never brand a certified activity. The ineligible organization cannot have control over any elements of the CPD activity that have been outlined as the role of the SPC and the related responsibility of recording participation in accredited activities.

**4.1 ADDIE Model**

The ADDIE Model will inform the design, development, implementation and evaluation of CPD programming.

**4.1.1 Analysis: Identifying Educational & Learner Needs**

The CPD educational planning process links identified educational needs/gaps regarding knowledge, competence, and performance with a desired result. The need for each CPD activity must originate with identifying professional practice gaps of the target audience and end with assessing the degree to which the intended learning objectives were met. The knowledge/skill gaps may come from any number of perceived and unperceived sources. Evidence of the learning need must be submitted as support documentation for each educational program seeking accreditation. Examples of sources include but are not limited to:

**Perceived needs** may be derived from the following:

- Evaluation results from previous CPD OFFICE activities (must be included in needs assessment for recurring programs).
- Formal survey of participants.
- Informal comments from individuals or groups (participants, course directors, potential faculty, planning committee members, experts in the field, hospital administrators, researchers, patients) (SPC review of these comments should be recorded in planning records such as minutes if used as a needs assessment resource).
- Patient problem inventories compiled by potential participants.
- Consensus of faculty members within a department or service area.

**Emerging Trends:**

- Availability of new method(s) of diagnosis or treatment.
- Availability of new (peer-reviewed) medication(s) or indication(s).
- Development of new technology.
- Legislative, regulatory, or organizational changes affecting patient care.

**Unperceived needs** are based on objective external data sources. These needs may be derived from the following:

- Epidemiological data.
- Quality assurance/audit data.
- Morbidity/Mortality.
- Critical incidence reviews and college complaints.
- Statistics, infection control data.
- Surgical procedure statistics.
- Professional society requirements and guidelines.
- Peer-reviewed literature.
- Government/Ministry of Health reports.
- Results of self-assessment tests.
- Direct observation of practice performance.
- Referral patterns.

Multiple sources of information must be considered when determining needs and should include both perceived and unperceived needs.

A review of CanMEDS competencies that would be influenced by educational interventions related to identified gaps is also a core part of the needs assessment strategy. It informs the topic selection, learning objectives, and educational methods used to most effectively influence the desired outcomes for the target audience.

**4.1.2 Design**

Learning objectives must be derived from the needs assessment and should reflect the CanMEDS/CanMEDS-FM roles that planners hope to influence.

Learning objectives describe the gap and the knowledge/skill that learners are intended to be able to apply for specific actionable and measurable outcomes after participating in this educational activity. Objectives should express the expected outcome in terms of competence or performance and should complete this statement: *“At the conclusion of this educational activity, the participant should be able to...”*.

Every CPD activity must state the program and session learning objectives in the printed brochure or other promotional material to assist participants in deciding whether to attend. The objectives should also be presented verbally and included in the PowerPoint, syllabus, or handout materials to provide a benchmark for evaluating the activity.

Scientific planning committees work with speakers to develop learning objectives during the planning stages to help determine the most effective learning methods and to assist speakers with preparing presentations that align with the overall and session-specific learning objectives.

#### **Selecting Educational Strategies:**

The choice of educational format must be based on the identified needs, the learning objectives, CanMEDS competencies being addressed, the target audience and their learning preferences, and other logistical and financial considerations.

Educational activities should ensure that at least 25 percent of the time involves interactive learning, as it has been shown that active participation engages the learner and helps the facilitator better judge the audience’s level of comprehension of the knowledge/skill presented. Educational strategies to promote interactive learning may include pre-tests, post-tests, questions posed to the audience, clicker response systems, voting cards, case-based learning, discussion, debates, patient-related interventions, video-tape triggers, and simulation.

#### **4.1.3 Develop**

In the Development stage, information gathered through the analysis and design stages is used to develop instructional materials.

SPCs and speakers must disclose to participants when and where artificial intelligence (AI) tools are used in content creation and how they reviewed the content was reviewed for accuracy.

If AI-generated content is used it must be reviewed for equity and accuracy and mitigation of any AI introduced bias. A human expert (speaker or SPC member) review must be applied to AI-assisted educational materials.

The planning committee will select presenters and/or facilitators. They may use the speaker communication package template located in the CPD OFFICE Program Development Toolbox to create a speaker communication package that explains the educational and ethical standards outlined by the CFPC and Royal College of Physicians and Surgeons. The speaker package will include specific instructions regarding session details, COI declaration forms and disclosure requirements, description of the program format and the target audience, incorporation of evidence, requirement for interactivity, identification of possible barriers to implementing changes and nature of the evaluation to be completed by participants.

Presentations will engage the audience most effectively through audiovisual materials, appropriate handout materials, and interactive sessions whenever possible. They will comply with the educational and ethical standards of the CFPC and RCPSC and with the National Standard for the support of accredited CPD activities to ensure academic integrity and educational independence.

#### **4.1.4 Implement**

In this fourth stage, the educational program or session is delivered or implemented. Efforts must be made to ensure an optimal learning environment for participants.

The educational content of a Mainpro+ certified activity may not be housed or hosted on the website of an ineligible provider organization or sponsor.

Rebranding of a certified activity with that of an organization other than the eligible provider(s) is prohibited. This includes repackaging or rebranding of the promotional materials linked to the certified activity by the hosting organization.

The original provider organization(s) must make sure that they retain access and control of activity records, educational content, invitations, brochures, registration/attendance lists, and certificates of attendance.

#### **4.1.5 Evaluation**

All CPD programs must include an evaluation strategy determined during the program's planning stage and linked to the established needs and stated learning objectives. Where relevant, participants must have the opportunity to evaluate individual sessions as well as the overarching program.

The evaluation must include questions related to bias and should allow learners to assess whether learning objectives and changes to the identified CanMEDs competencies were met. It should also allow learners to identify any anticipated change in the quality, effectiveness, or efficiency of their professional activities

or affirm their current practice. Finally, it should allow learners to assess the quality of the instructional process and provide feedback to speakers.

The evaluation may be in the form of a post-event survey, a follow-up survey or a phone call/focus group to obtain qualitative data regarding the impact of the program content on the professional practice or intended outcomes. Quantitative data may be obtained through a chart audit, patient interviews, and statistical data that may provide some sense of the program's success for program planners. There may be other means of evaluation appropriate to the activity.

A participant does not necessarily have to evaluate the session/program to receive a certificate of attendance. Separate methods may be used for documenting attendance and evaluating the activity.

When feasible, attempts should be made to link the identified needs and learning objectives with outcomes data.

Evaluations are used to assess the educational needs of the physician. They should be summarized and reviewed by the scientific planning committee at the completion of the program. Evaluation summaries should be retained by the scientific planning committee for no less than five years in case of credit validation or audit. The evaluation results should be shared with the chair of the scientific planning committee, who presents the summaries to the planning committee and respective speakers. The evaluation data helps planners improve future programs' development and is part of the ongoing quality improvement strategy.

## **4.2 Foundational Elements**

The foundation for the CPD OFFICE Education Planning Model is a novice-to-expert continuum grounded in lifelong learning, the CanMEDS/CanMEDS FM roles and competencies, and research.

### **4.2.1 Novice to Expert**

Physicians and health professionals continually build competencies along the novice to expert continuum based on their current role, knowledge and skill level, and advances in healthcare research and technology. The CPD OFFICECPD Office aims to assist CPD planners and participants in progressing along this continuum.

### **4.2.2 Lifelong Learning**

All physicians and health professionals must commit to lifelong learning to maintain their clinical and professional competence. The CPD OFFICECPD Office provides opportunities for physicians and health professionals to

develop and participate in educational programs to improve knowledge, skills, and attitudes around the CanMEDS competencies.

#### **4.2.3 CanMEDS/CanMEDS FM**

Originally developed by the RCPSC and modified by the CFPC, CanMEDS is well established in undergraduate and postgraduate medical education programs and is core to the Competency by Design initiative in postgraduate medical education. The CanMEDS/CanMEDS FM framework reflects all aspects of a physician's professional life. It should be used to guide the development of learning objectives, which will ensure comprehensive professional development.

#### **4.2.4 Research**

The CPD OFFICECPD Office shall ensure that best practices are incorporated into all CPD programming aspects. In addition, it will engage in a program of educational research and share research findings through conference presentations and publications to add to the growing body of CPD/medical education knowledge for physicians and health professionals.

### **5.0 ROLES AND RESPONSIBILITIES**

**CPD OFFICE**CPD Office is responsible for developing, co-developing and coaching SPCs to develop CPD programming.

- The CPD OFFICE Accreditation Coordinator ensures the SPC understands the administrative, educational and ethical standards and how they guide program development.
- The CPD OFFICE Coordinator supports/coaches the SPC with respect to the standards.
- The CPD OFFICE Research Coordinator may be requested to assist with a needs assessment or evaluation strategy.
- The CPD OFFICE Instructional Designer may be requested to guide with the educational design for an activity.

#### **Scientific Planning Committee (SPC):**

- SPC Chair: NOSM faculty, which ensures program development, respects the CFPC/RCPSC/CACME and National Standards.
- Representatives of the target audience (CFPC member/RCPSC fellow/HS professional/geographic representation, etc.).
- SPC Admin who supports the development and delivery of the RSS.

### **6.0 INTERPRETATION**

Questions of interpretation or application of this policy or its procedures will be referred to the CPD OFFICE at [cpd@nosm.ca](mailto:cpd@nosm.ca)

## 7.0 RELATED DOCUMENTS

### University Documents and Information

- [CPD OFFICE Program Development Toolbox](#)
- [CPD OFFICE Needs Assessment Portal](#)
- [Needs Assessment Summary Template \(Excel\)](#)
- [CPD OFFICE Tip Sheet for Writing Learning Objectives](#)
- [ChatGPT Tool for Writing Learning Objectives](#)
- [NOSM U CPD OFFICE Tip Sheets Tips & Tools for Interactivity](#)
- [NOSM U CPD OFFICE Tip Sheets Interactivity with Webex](#)
- [NOSM U CPD OFFICE Guide to Using Copyrighted Images in Presentations](#)
- [CPD OFFICE Tip Sheets Best Practices for Slide Design & Accessibility](#)
- [Speaker Package Template](#)
- [Conference Evaluation Template](#)
- [Series Session Evaluation Template](#)
- [Series Program Evaluation Template](#)
- [Workshop Evaluation Template](#)
- [Optimizing Session Evaluations Tip Sheet](#)
- [Optimizing Program Evaluations Tip Sheet](#)

### Legislation and Information

- [RCPSC CPD Activity Tools and Resources](#)
- [CFPC Understanding Mainpro+ Certification](#)
- [National Standard for the support of accredited CPD Activities](#)
- [Royal College of Physicians and Surgeons of Canada CanMEDS framework](#)
- [College of Family Physicians of Canada CanMEDS-FM \(2017\)](#)
- [ADDIE Model of Instructional Design](#)

## AUTHORITIES AND OFFICERS

The following is a list of authorities and officers for this policy:

- a. Approving Authority: CPD OFFICE Governance Committee
- b. Responsible Officer: Associate Dean, CPD OFFICE
- c. Procedural Authority: CME Medical Director, CPD OFFICE
- d. Procedural Officer: Director, CPD OFFICE

## Review and Revision History

**Review Period:** 2 years or as required

**Date for Next Review:** 2026 09

Date	Action
2019-11	Established and approved by the CPD OFFICE Governance Committee
2025-09-18	Revisions related to new CFPC AI Disclosure standards approved by CPD Office Governance.
2026-06-26	Revisions to remove CEPD Office, and replace with CPD OFFICE