



CAEP ENDORSEMENT GUIDELINES

Approved June 2009

Policy to be reviewed in five years time (January – June 2014)

1.0 DEFINITION OF ENDORSEMENT

- 1.1** In general terms endorsement means that CAEP supports, approves of, or recommends a program, initiative, or product subsequent to a review according to the guiding principles in this document.
- 1.2** Endorsements can be given to programs not developed or administered by CAEP recognizing that there is a limitation to the control CAEP has over the final product or program and the delivery of that program or initiative.
- 1.3** Endorsement does not imply any support, financial or otherwise, excepting that specifically outlined at the time of approval of the endorsement.

2.0 PRINCIPLES APPLICABLE TO ALL ENDORSEMENT REQUESTS

- 2.1** Successful proposals would need to have objectives consistent with CAEP's vision statement which is "Physicians providing excellence in emergency care for Canadians."
- 2.2** Successful proposals would need to have objectives consistent with CAEP's mission statement, which is "Empowering physicians to provide excellent emergency care through leadership, education, and advocacy."
- 2.3** Proposals for endorsement are required to be sponsored by a current member of CAEP.
- 2.4** Proposals for endorsement are required to be submitted in writing to the Head Office of CAEP in sufficient detail to allow CAEP to consider the proposal fully.
- 2.5** Proposals are required to be submitted in writing with all required information attached six (6) weeks prior to the proposed approval date to allow time for the proposal to be considered by the appropriate committee and a recommendation forwarded to the head office for review of the Head Office staff and subsequently the President.
- 2.6** Endorsements are ultimately the responsibility of the Board of Directors.
- 2.7** Approval of endorsements would generally be a duty delegated by the Board of Directors to the President to expedite the approvals. Where in the President's view the proposal does not clearly meet the outlined requirements, the President would have the option to confer with the Executive of the Board of Directors or the Board as a whole prior to issuing the approval.
- 2.8** Subsequent to the approval of an endorsement by the President or Executive the endorsement would become part of the Consent agenda for the next Board meeting. In considering the approved endorsements the Board may contemplate altering the interpretations of the requirements for endorsements or changes to this guideline for future endorsement proposals. It is anticipated that only in the most unusual and rare circumstances would the approval of an endorsement by the President be rescinded or altered by the Board of Directors.

- 2.9** All endorsement approvals will be issued by the Head Office under the signature of the President.
- 2.10** All endorsements would be time-limited approvals and the maximum length of approval will be three (3) years. After the time limit, re-application will be required to maintain and use the CAEP endorsement. If substantive changes to the program are anticipated prior to the expiration of the endorsement period an update outlining the proposed changes is required.
- 2.11** Endorsements can be considered from all types of organizations; national, provincial, or local. The main consideration in the review will be the quality of the proposal.
- 2.12** Where prior endorsements have been approved in a similar area of interest or subject the approval of the most recent endorsement will be reviewed with consideration to those prior endorsements. Review of the current proposal will be based on the best evidence at the time realizing that an approved endorsement in the past may be contradicted by the current endorsement based upon newer information.
- 2.13** Proposals will not be evaluated based on whether the intention is to make a profit or it is proposed as a not for profit venture. The value of the program versus the cost could reasonably be expected to be a consideration in the approval process.
- 2.14** The proposal will be evaluated to ensure it is free of bias in the information presented and to ensure the program has been prepared without undue influence on the part of financial supporters of the program.
- 2.15** All submissions for endorsement are required to comply with the provisions of the Canadian Medical Association (CMA) policy entitled Physicians and the Pharmaceutical Industry (2007) which is available on the CMA website.
- 2.16** Where the documents presented for endorsement involve written material intended for distribution nation-wide and those written materials are planned to be distributed in both French and English then those written materials are to be submitted for review in both languages.
- 2.17** Where submissions for endorsement such as standards, guidelines, and research proposals are based on research evidence that evidence shall be submitted based on a mutually agreed upon validation model. The current model used is the AGREE model.
- 2.18** If there is a conflict of interest, either real or perceived, involving any person at CAEP involved in the endorsement review process, that person will recuse themselves from deliberations on the endorsement approval.
- 2.19** CAEP recognizes that its endorsement on programs and other initiatives has value and under the appropriate circumstances CAEP would expect to be compensated for provision of the endorsement.
- 2.20** The decision of the Board is final and not subject to appeal.

3.0 PRINCIPLES FOR SPECIFIC TYPES OF ENDORSEMENT REQUESTS

3.1 Continuing Medical Education (CME)

- 3.1.1** CME endorsement requests will be reviewed by the Chair of the CME Committee or the CME Committee as a whole.
- 3.1.2** Endorsement for conferences will be limited to one (1) year in length.
- 3.1.3** With only rare exceptions will CME programs be endorsed that do not have accreditation by the College of Family Physicians or the Royal College of Physicians and Surgeons or the equivalent governing bodies in other jurisdictions. Submission of a justification for the lack of accreditation will be required. Where endorsement of a non-accredited program is requested, a more detailed submission would be required consistent with the requirements for accreditation by the College of Family Physicians of Canada and/or The Royal College of Physicians and Surgeons of Canada. Requirements for accreditation are available on their respective websites.
- 3.1.4** In addition to information outlined in Section 4, Submission Guidelines, CME proposals should include information demonstrating that:
- the program is relevant to emergency medicine;
 - planning committee members include representation from the target audience;
 - the program content addresses needs identified by the target audience;
 - content has been developed by a physician group or physician organization. The name of the committee chair and the level of involvement of the committee chair is to be included;
 - educational techniques are conducive to active involvement of the participants;
 - any financial support provided is in the form of an unrestricted educational grant;
 - no restriction on the content or control of the content has been required by sponsors of the program; and
 - any financial or other support is in compliance with the Canadian Medical Association (CMA) guidelines.

3.2 Advocacy

- 3.2.1** Programs with the main purpose of advocating for emergency physicians, their patients, their institutions, or the overall wellbeing of Canadians in a health context will be reviewed by the Public Affairs Committee Chair or the Public Affairs Committee.

3.3 Research proposals

- 3.3.1** Research proposals and research funding applications requesting endorsement will be reviewed by the Research Committee Chair or the Research Committee.

3.4 Position Statements and Guidelines

- 3.4.1** Position statements and guidelines will be reviewed by the Standards Committee Chair or the Standards Committee.

3.4.2 Details need to be provided on:

- costs associated with accessing or using the guidelines or position statements, if any;
- the distribution of and access to the guideline or position statement; and
- to whom the guideline or position statement will be available.

3.5 Public Safety, Prevention, Products and other endorsement proposals

3.5.1 Programs and products in these categories will be reviewed on a case-by-case basis by the CAEP Head Office and President to determine what committee is best suited to review the proposal.

3.5.2 Where no committee is a match to the request, and where the proposal does not clearly meet the outlined requirements allowing approval directly by the President, the request will be referred to the Executive Committee of the Board of Directors or the Board of Directors as a whole.

3.5.3 Where the proposal involves a product, the proposal shall contain verification that the product has been approved by the applicable authorities and regulatory bodies such as the Canadian Standards Association (CSA).

3.6 Corporate Partnerships

3.6.1 Partnerships to promote corporate programs considered to be beneficial to both CAEP as an organization and to its members could be considered. If an agreement is entered with a corporation for such a program CAEP will have effectively endorsed the product as worth consideration by its members.

3.6.2 Examples of programs could include but not be limited to:

- insurance products such health, disability, home and auto;
- banking and loan services;
- real estate and relocation services; and
- discounts on retail purchases.

3.6.3 The criteria used to evaluate any such proposal would be that it represented clear value when compared to similar products of competitors. This arrangement would need to be of benefit to both the association and the members.

4.0 SUBMISSION GUIDELINES

4.1 The format of the submission is not specified by these guidelines but the submission must be in writing and be in sufficient detail to allow the persons or committee to evaluate the proposal and provide an opinion regarding endorsement to the Head Office and President.

4.2 The Head Office and President will determine if a presentation in person, in addition to the written proposal, would be of benefit.

4.3 Of interest to the reviewers would be the details of the proposal regarding

4.3.1 Description

- intended scope and content of the program
- scientific evidence in support of the proposal, the quality of the evidence, and references to the evidence
- description of any controversial aspects of the proposal and the applicant's position on the controversies

- the target audience and how that audience is relevant to CAEP
- an explanation of how the program is compatible with the mission and vision statements of CAEP

4.3.2 Contact Information

- contact person's name, phone number, fax, and e-mail address in the event that the reviewers wish to contact the responsible parties to clarify points in the submission

4.3.3 Timing

- whether the program or initiative is a single or ongoing program or initiative
- if ongoing, the proposed mechanism of updating CAEP on revisions to personnel or content

4.3.4 Personnel

- the key personnel involved in the program or initiative and their qualifications
- proposed mechanism for advising CAEP of changes in key personnel

4.3.5 Scope

- details regarding location; that is national, provincial, regional, local
- by what medium will the program or initiative be delivered
- details outlining if the program site specific or for wider use

4.3.6 Financial

- cost to persons or groups using the program or initiative
- intention to break even versus generate a profit on the program or initiative
- details of any sponsorship funding
- when applicable details of administrative costs, honorariums paid, expenses, and sources of revenue are to be provided.
- proposed financial incentives for endorsing the program or initiative, if any