The CAEP Working Group on Conference and CPD Development
Report and Recommendations

September 2025

Introduction and Context

After the International Conference on Emergency Medicine (ICEM) 2025 the Canadian Association of Emergency Physicians (CAEP) established a working group on Conference/CPD development. The mandate of the group was to identify gaps in policy or process related to National conferences and CPD events – specifically in the areas of moderator and speaker selection, disclosure, respectful discourse, moderator expectations, and managing protestors or other forms of disruption.

This work occurred in the context of concerns raised about a plenary session and an individual session that were delivered at ICEM 2025. The working group received significant background information related to what occurred at ICEM 2025, as well as the steps CAEP had taken prior to, and in response to these events.

In reviewing this information, the working group wants to recognize that significant efforts were made by CAEP and its members prior to these sessions at ICEM, during the event, and afterwards to avoid problems and address concerns. Many of our recommendations recognize the value of these efforts and suggest they be incorporated as part of future policies and procedures. We want to be very clear that our recommendations are not intended as a criticism of the efforts of those who were involved. Our recommendations are intended not simply as a response to what occurred but as a robust set of ideas that will promote respectful discourse and a safe learning environment at future CAEP events.

The working group also wants to recognize that these recommendations address a serious but uncommon issue. Most sessions at CAEP conferences deal with topics that are not politically or personally contentious. The incidence of significant speaker or attendee misconduct at CAEP events is exceedingly rare. For some recommendations CAEP may need to balance the resources required relative to the frequency of the issue they are intended to prevent.

The CAEP Board of Directors has reviewed and approved the following recommendations which will guide CAEP 2026 and beyond (Table 1). This is an iterative document which will be reviewed and refined at least annually to ensure our educational events continuously improve in safety, inclusivity, alignment with CAEP's values, and are responsive to member concerns.

Table 1. Summary of Recommendations

1	CAEP will develop an enhanced disclosure process for potential speakers. In addition to traditional COI declarations, speakers will reflect on and disclose personal, professional, or political affiliations that could influence their perspective and their presentation.
2	CAEP will adopt a speaker code of conduct (based on material developed for ICEM 2025) that all speakers must review and sign. Appendix A offers a sample document containing suggested wording for the expanded definition of COI, and the Respectful Discourse and Sensitive Content policy (i.e., speaker code of conduct).
3	CAEP will standardize the process for speaker selection. While the primary considerations for selection as a speaker remain content-expertise and diversity considerations, additional issues such as organizational roles, prior interactions with CAEP, reputation as a speaker, traditional media presence, and social media activity should be recognized as relevant.
4	In situations where a speaker or a topic are identified as potentially controversial or contentious the above issues (organizational roles, prior interactions with CAEP, reputation as a speaker, traditional media presence, and social media activity) should be formally reviewed.
5	CAEP will standardize the process for moderator/track chair selection. While the primary considerations for selection as a moderator or track chair remain content-expertise and diversity considerations, additional relevant considerations include prior experience, and strong communication skills.
6	CAEP will develop a manual (and additional educational resources or support) for moderators and track chairs that outlines the responsibilities and authority invested in these roles. Specific recommended elements of the manual are included in the report. There should be additional evaluation of, and feedback provided to moderators and track chairs.
7	CAEP will formalize their approach to speakers or topics that are identified as potentially controversial or contentious. Building on many of the steps taken at ICEM 2025 the report identifies specific steps to be taken both prior to and during the session. Multiple individuals should be involved in these procedures. These steps should be more stringent for plenary speakers/sessions and other national/large audience sessions (such as National Grand Rounds).
8	CAEP will offer all speakers of plenaries and other large audience sessions the opportunity to meet with a "speaking coach" – this would support speakers, improve the quality of presentations, and screen for concerning content. This would also be offered to other speakers (i.e. session speakers) if concerns have been identified regarding the speaker or the content.
9	In cases where a speaker or a topic are identified as potentially controversial or contentious, and that individual declines the offer of a speaking coach, the speaker would have to submit their slides/presentation for review in advance of the session.
10	CAEP will develop an introductory statement that can be read prior to sessions that may be seen as controversial or contentious. It would outline the steps taken to promote a respectful and safe environment and identify appropriate ways for attendees to provide feedback.
11	Speakers will be required to disclose relevant personal affiliations as well as COI in a slide and verbally at the beginning of their presentation.
12	Moderators and track chairs will be empowered to intervene if something is said by the speaker that contravenes the Respectful Discourse and Sensitive Content policy.
13	CAEP will change the format of audience questions at plenary/large audience sessions from an open mic to a moderated format.
14	The CAEP board and Conference Planning Committee will have a standard process for documenting concerns that are received regarding potential speakers or topics, and for documenting their response to these concerns.
15	CAEP will develop a code of conduct for registered attendees at their educational activities. Suggested elements for that code are included in the report. This would serve primarily as an internal document to

	guide CAEP response to events/actions. The board can determine if they feel it would be appropriate to disseminate this more widely.
16	Moderators and track chairs will be empowered to request that attendees who engage in disruptive behaviors stop and are reminded of appropriate avenues for registering concerns. Disruptive behavior should not be tolerated in an educational session. The report outlines an escalating set of actions that can be taken, and supporting procedures that can be put in place to achieve this aim.
17	CAEP will develop a policy regarding other forms of protest or disruptive activities that may take place at CAEP educational event but not in a specific session. CAEP should not allow attendees to engage in disruptive activities or protest at a CAEP event. The report outlines an escalating set of actions that can be taken, and supporting procedures that can be put in place to achieve this aim.
18	A breach of the Respectful Discourse and Sensitive Content policy by a speaker, or disruptive behavior by an attendee that requires a formal response should be investigated by the CAEP board and Conference Planning Committee with potential consequences for the individuals involved.

Background and Rationale

Section 1 – Expanding our definition of potential conflicts of interest

CAEP represents a diverse community of Canadian emergency physicians and is committed to providing high-quality education and advocacy that is both effective and inclusive. While CAEP encourages challenging, thought-provoking discussions, it also prioritizes creating a safe and respectful environment for all participants.

Speakers at CAEP events are routinely asked to disclose financial or personal conflicts of interest, as required by accrediting bodies, to ensure presentations are evidence based and unbiased. However, this alone may not ensure that material is delivered in a respectful or inclusive manner.

CAEP supports discussions on complex and current issues, including those involving advocacy or speculation. In such cases, presenters may share personal interpretations or call for specific actions. While this can add value, it also introduces the potential for disagreement, and in rare cases, concerns about marginalization or hate speech.

We recommend an enhanced disclosure process for potential speakers. In addition to traditional COI declarations, speakers will be asked to reflect on and disclose personal, professional, or political affiliations that could influence their perspective and their presentation. This information may be included in the conference program and should be disclosed at the start of their presentation.

See appendix A for a sample form which utilizes the current CAEP template for COI disclosure, but also adds and defines non-financial conflict of interest. Any speaker at a CAEP event would be required to identify financial and non-financial conflicts and return the signed form.

Section 2 – Speaker Code of Conduct

Prior to ICEM 2025 CAEP was made aware of concerns regarding one of the invited plenary speakers and took action to prevent inappropriate content from being delivered at the conference. One of these was the development of a speaker code of conduct. Distributed under the heading "Speakers and Moderators guidelines" it reinforced the importance of "fostering a respectful and professional environment", upholding the "highest standards of academic integrity and ethical discourse"

and prioritizing "shared learning and constructive engagement". The code identified specific content and language that should be avoided. When concerns were raised about a specific speaker, they were asked to acknowledge they had received the guidelines and would abide by them.

We recommend that CAEP adopt a similar speaker code of conduct that all speakers must review and sign. We have called this a Respectful Discourse and Sensitive Content policy. This would be distributed along with COI disclosure forms.

See appendix A for a sample form which includes the Respectful Discourse and Sensitive Content policy as well as the conflict-of-interest disclosure forms. Speakers should have to sign and return these.

Section 3 – Speaker Selection

Plenary speakers and moderators for plenary sessions at CAEP events are currently chosen by the Chairs of the CAEP Conference Planning Committee. Session moderators and individual speakers are chosen by Track chairs from applications submitted by CAEP members.

We understand that the current process is informed by formal guidelines indicating the importance of content expertise and the need to consider principles of equity, diversity, and inclusion. There is also an informal aspect whereby an individual's positions, prior interactions with CAEP, reputation as a speaker, traditional media presence, social media activity, and other relevant factors may be considered.

There should be an expectation that all speakers deliver accurate and up-to-date content in a respectful and inclusive manner. However plenary speakers (and other speakers at national CAEP events – such as National Grand Rounds) have a larger stage on which to speak. These sessions have a larger audience and are more likely to draw the attention of external organizations and the media. This provides a rationale for increased scrutiny of plenary and national speakers.

We recommend the selection process for speakers be standardized. While the primary considerations for selection as a speaker should remain content-expertise and diversity considerations, additional issues such as organizational roles, prior interactions with CAEP, reputation as a speaker, traditional media presence, and social media activity should be recognized as relevant.

For plenary sessions and national speakers, part of the speaker selection process should involve a discussion regarding the nature of the topic, and the potential for controversy or conflict. In situations where a speaker or a topic are identified as potentially controversial or contentious the above issues (organizational roles, prior interactions with CAEP, reputation as a speaker, traditional media presence, and social media activity) should be formally reviewed by the Chairs of the Conference Planning Committee and the concerns brought forward to the CAEP Board of Directors.

Section 4 – Moderator/ Track Chair Selection and Expectations

Plenary Session Moderators and Track Chairs play an important role in speaker selection, negotiating session topics and learning objectives, communicating expectations with speakers, identifying potential concerns, and managing the session itself.

We recommend that CAEP standardize the process for moderator/track chair selection. While the primary considerations for selection as a moderator or track chair remains content expertise and diversity considerations, additional relevant considerations include prior experience, and strong communication skills.

Moderators and Track Chairs should be aware of their responsibilities and authority, specifically as relates to potentially contentious or controversial speakers or topics. Several resources were developed for ICEM 2025 that address these issues (ICEM2025-Speakers-and-Moderators-Guidelines and ICEM2025-Track-Chairs-Speaker-Guidelines). This material could be used as the basis for the following recommendation.

We recommend that CAEP develop a manual (and additional educational resources or support) for moderators and track chairs that outlines the responsibilities and authority vested in these roles. Review of this should be mandatory for first-time moderators/track chairs.

Some of the responsibilities/authority included in this document would be:

  i. Participate in the selection of speakers (for Track Chairs).
 ii. Communicate with speakers to confirm their agreement with the Respectful Discourse and Sensitive Content policy, finalize topic and learning objectives, and offer a speaking coach/review of presentation (section 5).
iii. Review COI and personal affiliation statements – and negotiate mitigation of bias if needed. This includes determining the process for public disclosure, e.g., publication in conference program, presentation slide, and/or verbal disclosure.
 iv. At the time of the session – read CAEP statement around Respectful Discourse and Sensitive Content to audience (if potential concerns), respond to concerning statements or actions by speaker and moderate audience questions (section 5), and respond to concerning actions by attendees (section 6).

We recommend additional evaluation of session moderators and track chairs at CAEP conferences and other national events.

CAEP already has post-session and post-conference evaluation structures in place, and some attendees may comment on the roles of Moderator or Track chair as part of these evaluations. We believe there would be additional benefit in having specific questions about the moderators and track chairs as part of these evaluations, as well as having speakers evaluate their session moderator or track chair.

Section 5 – Session preparation and delivery

CAEP events provide speakers with a platform to disseminate their knowledge and ideas. While each speaker must ultimately be responsible for the material they present, and how they present it, CAEP bears responsibility for choosing and vetting speakers, and for creating conditions that promote the presentation of unbiased information in a respectful manner. While CAEP policy and oversight should apply to all sessions being delivered under the auspices of the

organization, there are certain situations (such as a plenary speaker at a conference, or a speaker for national grand rounds) where additional oversight is appropriate.

In the previous sections we have recommended that CAEP adopt a Respectful Discourse and Sensitive Content policy, standardize policies and procedures for how speakers are chosen, and ensure speakers understand and acknowledge the expectations that CAEP has of them. This section further delineates policies and procedures we recommend in advance of potentially controversial sessions, and during the delivery of these sessions.

We recommend that CAEP formalize their approach to speakers or topics that are identified as potentially controversial or contentious. Building on the steps taken at ICEM 2025 we identify procedures that should be instituted prior to the session, as well as utilized during the session. We recommend additional procedures for plenary speakers or other national, large audience educational events. Many of these involve moderators or track chairs and so it will be important that they receive education and support from CAEP in this area.

A) In advance of a presentation:

For all speakers/presenters at CAEP events:
i.   Subject of talk and learning objectives be negotiated and reviewed with moderator/track chair/selection committee.
ii.   COI and personal affiliations statements completed/signed by speakers and reviewed by moderator/track chair/selection committee.
iii.   Respectful Discourse and Sensitive Content policy signed by speakers.
iv.   If any COI/personal affiliations are identified/disclosed – need to review how public disclosure will be managed (e.g., in the program, on a slide, verbally).

For plenary/large audience speakers:
i.   Subject of talk and learning objectives negotiated and reviewed with selection committee.
ii.   COI and personal affiliations statements completed by speakers and reviewed by selection committee.
iii.   Respectful Discourse and Sensitive Content policy signed by speakers.
iv.   If any COI/personal affiliations are identified/disclosed – need to review how public disclosure will be managed (e.g., in the program, on a slide, verbally).
v.   Slides should be submitted in advance and reviewed by the selection committee.

We recommend CAEP offer all plenary and other large audience speakers the opportunity to meet with a "speaking coach" – this would support speakers, improve the quality of presentations, and screen for concerning content. This would also be offered to other speakers (i.e. session speakers) if concerns have been identified regarding the speaker or the content.

In cases where a speaker or a topic are identified as potentially controversial or contentious, and that individual declines the offer of a speaking coach, the speaker would be required to submit their slides/presentation for review in advance of the session.

B) At the time of the presentation:

Even if potential concerns are identified regarding a topic or a speaker's personal views/affiliations, CAEP may determine the education or advocacy value of a session is significant and elect to proceed. In addition to the considerations above (learning objectives reviewed, signed Respectful Discourse and Sensitive Content policy, personal affiliations disclosed and reviewed) we recommend the following additional steps be taken at the time of the presentation.

We recommend CAEP develop an introductory statement that can be read prior to sessions that may be seen as controversial or contentious. It would outline the steps taken to promote a respectful and safe environment and identify appropriate ways for attendees to provide feedback – including through session evaluations and directly to the conference organizing committee or the CAEP board.

We recommend speakers disclose relevant personal affiliations (non-financial conflicts) as well as financial COI in a slide and verbally at the beginning of their presentation.

We recommend moderators and track chairs be empowered to intervene if something is said by the speaker that contravenes the Respectful Discourse and Sensitive Content policy.

An initial warning would be provided to the speaker when this occurs. If the speaker continues to engage in behavior that contravenes the policy or contravenes it a second time the moderator would be empowered to stop the session. This would be considered a very significant action, and the moderator/track chair should immediately provide a brief report to the Conference Planning Committee and the CAEP board.

We recommend that CAEP change the format of audience questions at plenary/national sessions from an open mic to a moderated format.

Many conferences have adopted a moderated questions format for educational sessions – where questions from the audience are sent electronically to the moderator and can be summarized and reframed if needed before being presented to the speaker. This is a more efficient way to ask questions and helps avoid confrontation and protest.

Section 6 – Responding to concerns, disruptions, and protests

CAEP educational events should foster a welcoming atmosphere that encourages open dialogue, the free exchange of ideas and is free from harassment, bullying and discrimination. CAEP endeavors to treat all members and participants fairly and with respect, courtesy, and consideration, regardless of their background, identity, experience, or perspectives.

The CAEP Conference Planning Committee or the CAEP board may become aware of concerns/protests/potential disruptions before an event occurs.

We recommend the CAEP Conference Planning Committee and the CAEP board have a standard process for documenting concerns that are received regarding speakers or topics and document their response to these concerns.

CAEP is committed to promoting an educational environment that is safe and respectful. Ensuring that speakers are aware of the Respectful Discourse and Sensitive Content policy, and monitoring their compliance is a key part of this

commitment. Procedures for dealing with inappropriate speaker behavior are outlined in section 5. Creating expectations for attendees and responding to attendee behaviors is more challenging.

We recommend CAEP develop a code of conduct for registered attendees at their educational activities.

It will outline a process for attendees to follow if they have concerns about a speaker's statements, affiliations, or presentation. These should be directed to the Conference Planning Committee and/or the CAEP board through a session evaluation or direct communication. Disruptive or confrontational behaviors — including yelling during presentations, disrespectful comments, or questions, or engaging in protest activities such as displaying signs — are not acceptable in educational venues. These actions are not consistent with medical professionalism, undermine a respectful and safe learning environment for all participants and are not considered appropriate ways to register concerns or opposition. CAEP values free speech and a diversity of opinion and feels that it is important that these concerns be heard – but they should be directed to the Conference Planning Committee or the CAEP board and done so in a clear and respectful manner.

We recommend that Moderators and Track Chairs be empowered to tell attendees who are engaging in disruptive behaviors that they must stop. They should be reminded of appropriate avenues for registering concerns.

If an individual continues to act in a disruptive manner, then a series of escalating measures should be used to stop the disruption and allow the session to continue. These measures may include informal persuasion, a formal request from CAEP leadership, contacting venue security, and even involving police, depending upon the nature of the disruptive behavior.

We recommend that CAEP develop a policy regarding other forms of protest or disruptive activities that may take place at CAEP educational events. CAEP should not allow attendees to engage in disruptive activities or protest at a CAEP event.

CAEP should have formal agreements with the venues they use for educational events regarding the level of security/support to be provided, and the expected response if CAEP believes venue security needs to become involved. CAEP should identify as part of the attendee code of conduct that formal protests and other disruptive activities are not allowed at the educational venue. If this occurs, then a similar process should take place as recommended for disruptions during specific sessions. Measures that could be used to remove protesters may include informal persuasion, a formal request from CAEP leadership, contacting venue security, and even involving police, depending upon the nature of the disruptive behavior.

We recommend that a breach of the Respectful Discourse and Sensitive Content policy by a speaker, or disruptive behavior by an attendee that requires a formal response result in an investigation by the Conference Planning Committee and the CAEP board.

The individual involved should be given an opportunity to explain their actions and apologize if appropriate. If CAEP leadership finds the response acceptable, then the individual would be permitted to continue to actively participate in CAEP committees/activities and could be considered as a future speaker. If they chose not to respond or apologize, they would not be eligible to sit on CAEP committees, hold positions of leadership, or be a speaker at a CAEP event. For particularly serious incidents CAEP leadership could also consider revoking an individual's CAEP membership, and/or preventing the individual from attending future events.

<u>**Appendix A**</u>

Speaker Disclosure & Presentation Guidelines

Thank you for your contribution to the Canadian Association of Emergency Physicians' (CAEP) <u>*insert educational event*</u> <u>*name*</u>, a gathering of professionals committed to advancing emergency medicine through education, collaboration, and respect.

As a speaker, you play a key role in shaping the intellectual and cultural climate of our event.

We ask you to review and complete the following declaration and agreement to ensure transparency, professionalism, and consideration for our diverse audience.

1. <u>**Conflict of Interest Disclosure**</u>

In the interest of transparency and maintaining the integrity of our educational programming, we ask that you disclose any financial or non-financial interests that may be relevant to the content of your presentation.

Please declare any of the following (check all that apply):

☐ I have/had financial interests that may be perceived as related to the content of this presentation, including:
   • Affiliation with not-for-profit or for-profit organizations
   • Research funding
   • Consulting fees
   • Honoraria

☐ I have/had non-financial interests that may be perceived as related to the content of this presentation, including:

   • Leadership or public affiliation with political, military, humanitarian, or advocacy organizations
   • Public statements or published materials on topics that may intersect with the subject of your presentation
   • Other potential sources of personal, ideological, or organizational bias

☐ I have no relevant conflicts of interest, financial or non-financial, to disclose.

You will have an opportunity to disclose relevant interests at the beginning of your presentation as well.

If you have indicated either financial or non-financial interests to disclose, please complete the following table:

	Name of for-profit or not-for-profit organization(s), or other affiliation	Description of relationship(s)
Any direct financial relationships including receipt of honoraria		
Membership on advisory boards or speakers' bureaus		
Funded grants, research, or clinical trials		
Patents for a drug or device		
All other financial or non-financial relationships/affiliations/biases that could be seen by a reasonable, well-informed participant as having the potential to influence the content of the educational activity		

2. Respectful Discourse & Sensitive Content Policy

Our audience includes individuals from many regions, cultures, and backgrounds, including those who have lived through conflict, displacement, or political oppression.

We ask that all speakers:

- Present content with sensitivity to global and regional diversity
- Avoid language or commentary that may be perceived as politically partisan, inflammatory, or exclusionary
- Frame potentially sensitive content within its professional and educational context, with clarity and neutrality
- Focus on clinical, educational, or operational relevance, not political advocacy

If your talk may include material related to humanitarian crises, armed conflict, or public health controversies, we ask you to notify the program committee for support in framing or contextual review.

Our goal is to foster learning environments where difficult realities can be discussed respectfully, without harm or marginalization.

3. **Speaker Agreement**

By signing below, I affirm that:

- I have disclosed all relevant financial and non-financial interests.
- I understand and agree to the Respectful Discourse and Sensitive Content Policy.

Name: _____

Presentation Title: _____

Signature: _____

Date: _____