



# **Faculty Handbook for Live CME Activities**

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# **INTRODUCTION & BACKGROUND**

## **Introduction**

The American Academy of Family Physicians (AAFP) Continuing Medical Education Division (CMED) intends to provide a professionally rewarding and personally fulfilling experience for all involved in the creation of continuing medical education (CME). As such, the Faculty Handbook for Live CME Activities (this “Handbook”) has been created to clarify roles and responsibilities related to development and delivery of CME activities. This Handbook should be viewed as a tool to clarify role definition, activity expectations, and identification of deliverables from faculty engaged and contracted with the AAFP, as well as clarification of the roles of CMED staff. This Handbook is intended to accompany each faculty member’s contract, working as a reference tool and to simplify processes and expedite the creation of the highest quality CME content possible.

## **AAFP Curricular Framework**

The AAFP Curricular Framework defines core priorities for which content is created and is foundational to the global CME portfolio. These priorities are developed based on gaps in professional practice determined through needs assessments conducted as part of CME activity planning, review of comparative effectiveness research, and evidence-based sources. The AAFP Curricular Framework helps to frame the delivery of relevant education, assisting in identification of clinical content areas that are fundamental to increasing knowledge and competence, improving the performance of the physician and the care team, and, ultimately, positively impacting patient care and community health. Developed internally with evidence-based resources and under the direction of the Commission on Continuing Professional Development, the AAFP Curricular Framework consists of 15 body systems and over 600 sub-topics that are scientifically valid as well as critical to knowledge and clinically relevant for family physicians.

## **Educational Plan and Activity Design Format**

An Educational Plan, developed for each CME activity, includes a concise, clinical needs assessment analyzing data from various sources to ensure the education is designed to accurately and consistently improve practice based on identified gaps in competency and performance, and assure compliance with all AAFP CME Credit System Guidelines, the Accreditation Council for Continuing Medical Education (ACCME) Essential Areas and Elements (including the Standards for Commercial Support) and other CME Accreditation Policies. Adult learning principles, fundamental to the selection of the appropriate educational delivery format and optimal learning opportunities, provide an additional critical component of the educational plan. The most appropriate educational delivery method is designed by the AAFP to best reach the learners and achieve maximum educational impact and emphasize desirable physician attributes as identified by the Institute of Medicine, the American Board of Medical Specialties, and the Accreditation Council for Graduate Medical Education. Faculty and staff work collaboratively on matters directly related to the development of educational goals, course content, process, coordination, implementation, and evaluation.

# **FACULTY AND STAFF ROLES & RESPONSIBILITIES**

## **CME Faculty Identification, Qualifications, and Selection**

The AAFP has been providing CME for health care professionals for more than 60 years and currently has a strong pool of faculty from which to draw. Feedback from evaluations are reviewed and provided

to faculty members following the delivery of all AAFP CME, which allows the AAFP to determine whether faculty selection is meeting the learners' needs. Based on input from these evaluations completed by learners and physician leadership, the AAFP continuously refines the faculty selection process and offers faculty development initiatives to ensure quality and excellence. When necessary, content experts outside of the specialty of family medicine are identified to serve on content development committees and deliver education.

Potential faculty members are invited to clarify clinical and practice management expertise by entering individualized information regarding specific topics in the AAFP Interest and Expertise Portfolio (IEP). The AAFP utilizes the IEP as a database to assist with the faculty selection process and to match faculty with expressed interest in specific topics to potential teaching opportunities. The IEP is accessible at <http://www.aafp.org/myportfolio>. Once selected, faculty members are expected to create and/or update their individual profile in the IEP.

In addition, potential faculty members are strongly encouraged to complete the National Faculty Education Initiative (NFEI) online training at <http://www.nfeinitiative.org/>. The goal of the NFEI program is to ensure medical education faculty members understand the differences between certified CME activities and commercial marketing/promotional programs. NFEI was introduced in October 2008 by the Alliance for Continuing Education in the Health Professions, formerly the Alliance for Continuing Medical Education, and the Society for Academic Continuing Medical Education (SACME), in collaboration with the Association of American Medical Colleges (AAMC). Once selected as an AAFP CME faculty member, NFEI training is mandatory and must be completed prior to serving as a faculty member for an AAFP CME activity.

The AAFP complies with the ACCME Standards for Commercial Support, the American Medical Association's Council on Ethical and Judicial Affairs (CEJA) ethics policies, and other laws, regulations and codes pertaining to conflicts of interest. All faculty members are required to read and comply with the AAFP's Conflict of Interest (COI) Policies and must update their COI Forms to be complete and accurate on a continuing basis. For initial consideration by the AAFP for CME faculty, COI disclosures must be current and are reviewed by the AAFP prior to final selection. Faculty members should understand that failure or refusal to disclose, false disclosure, or inability to resolve conflicts of interest will disqualify them from participating in a CME activity.

The AAFP strives to be transparent in its reporting practices and will provide the necessary documentation to be compliant with best practices. The AAFP does not provide or sell faculty contact information, terms of contracts, or proprietary intellectual properties unless required by law.

In connection with the performance of services, AAFP staff members and faculty members agree not to discriminate against any other staff member or faculty member because of age, race, religion, color, handicap, sex, physical condition, developmental disability, sexual orientation, or natural origin.

To serve as a faculty member (Chair, Faculty – Content Development, Faculty – Presentation, Peer Reviewer, Advanced Life Support in Obstetrics (ALSO)/Maternity Care and Patient Safety (MCPS) Faculty), the following criteria must be met:

- Expertise in the specific subject area
- Knowledge of practice issues and problems related to the subject matter
- Credibility and high regard by the medical community at large

- Experience in teaching methods and learning strategies
- Appreciation for and application of adult learning theory
- Ability to address the learning needs of the target learners
- Ability to deliver education in compliance with current professional codes, standards, laws, or regulations governing CME, continuing professional development, and independent medical education
- Completed and updated information in the IEP database
- Completed and current COI Form disclosing any relationships with industry that could pose real or perceived conflicts of interest

Following are the **qualifications** for **specific faculty types**:

**Chair (only one person will serve in this capacity during the lifecycle of the project)**

- Authority on the clinical topic acquired through clinical practice, education, or research (7-10 years related experience)
- Effective communication skills
- Demonstrated ability to work effectively in a team environment
- Proven experience establishing accountability through measurable deadlines
- Demonstrated leadership within committees

**Faculty – Content Development**

- Clinical expertise in the selected clinical topic acquired through clinical practice, education, or research (5-7 years related experience)
- Effective communication skills
- Demonstrated ability to work effectively in a team environment
- Proven experience establishing accountability through measurable deadlines

**Faculty – Presentation**

- Clinical expertise in the selected clinical topic acquired through clinical practice, education, or research (3-5 years related experience)
- Effective communication skills
- Demonstrated ability to work effectively in a team environment

**Peer Reviewer**

- Clinical expertise in the selected clinical topic acquired through clinical practice, education, or research (3-5 years related experience)
- Ability to determine if activity content aligns with educational plan, contains the most up-to-date medical and drug information, and is free from commercial bias
- Demonstrated ability to work effectively in a team environment
- Proven experience establishing accountability through measurable deadlines

**ALSO/MCPS Faculty (including, but not limited to, the following):**

- Successful completion of an ALSO Provider course
- Valid teaching experiences, including Provider or Instructor courses
- Maintenance of an active maternity care practice, either personally or through the supervision of residents in training

- Approved ALSO Instructors must teach in three courses every five years to maintain their status
- For Provider course, must involve at least one approved ALSO advisory faculty. Advisory faculty must have served as a course director, achieved ALSO approved Instructor status, completed and submitted an application (with CV, letter of interest, letter of recommendation) and received final approval from ALSO staff
- Qualified healthcare professional who is comfortable with the goals and objectives of the course and agrees to use standard course methods

#### **Faculty – Family Medicine Experience (FMX) General Session**

- Expertise in topic acquired
- Effective communication skills
- Ability to speak to a very large audience

#### **Chair and Faculty Roles and Responsibilities**

The AAFP integrates various educational designs for CME which may include live activities, online, performance improvement in practice, multi-format, audience response system integration, interactive learning management systems, reflective education, and other appropriate formats. In addition, many live CME courses are recorded on a revolving schedule and developed into self-study materials to allow access and benefit to additional learners. Faculty members for self-study package CME activities may be the same as in the live CME activity and faculty who are invited to serve in this capacity will have this role delineated in the faculty service agreement set forth for the particular CME activity.

All faculty members are expected to maintain current knowledge of the applicable subject matter and incorporate new information into the CME content they are developing or delivering. Faculty should incorporate into CME content current health alerts including drug or device recalls, Risk Evaluation and Mitigation Strategies (REMS) from the Food and Drug Administration (FDA), and changes in standard of care. Key practice recommendations should be included in CME content, along with clear discussion of evidence based performance measures when applicable.

All faculty members complete a contract for service with the AAFP. The service agreement sets forth the capacity(ies) in which the faculty member will serve for a particular CME activity. Roles and responsibilities should be reviewed in conjunction with individual faculty contracts, to assist in expectations defined in the educational plans. Deliverables on this list will vary based on specific faculty role and CME activity.

Occasionally, faculty members are invited to meet as a group and participate in overall CME activity content revision that may involve travel. In these cases, the CME activity chair is responsible to lead faculty through feedback from CME activity evaluation data, guidance from other course faculty, and other available data sources, while working with the product team on content revision.

The AAFP is committed to providing family physicians and the family medicine community high-quality CME opportunities. Because of this commitment, the AAFP is also committed to its faculty members and recognizes the value the faculty members bring to AAFP CME programs. Accordingly, the AAFP has developed training and development opportunities for its faculty, and sometimes, depending on the CME activity, faculty members will be required to participate in aspects of training and development as provided by the AAFP.

## **Chair**

### **Chair**

#### **Board Review, Multi-Format, National Courses**

- Lead the team from project initiation through completion
  - Oversee the session/program development to align with the educational plan
- Develop the course content for a CME activity
  - Develop relevant session content in accordance with the provided educational plan and learning objectives
  - Communicate effectively through telephone calls, e-mail, and conference calls
  - Provide leadership and guidance to the presentation faculty
  - Handle problematic situations as needed (e.g., presentation faculty change locked content)
  - Help ensure all AAFP intellectual property requirements are met
  - Meet deadlines for deliverables and materials so that production schedule is met
  - Create content in accordance to AAFP editorial guidelines
  - Adhere to AAFP PowerPoint Style Guide
  - Work collaboratively with peer reviewer, medical editor, staff editor, and project specialist as necessary
- Provide leadership and direction to the content development faculty
- Create a team environment with all stakeholders by serving as a liaison between faculty and staff to ensure all parties are working effectively
- Follow the established process if revisions are suggested to the educational plan and review changes to learning objectives submitted by the faculty
- Work collaboratively with staff
- Peer review content to determine/resolve commercial bias issues
- Ensure that session-specific questions are submitted by faculty for breakout sessions presented at the course
- Serve as moderator for the live activity
- Be prepared to re-direct the education in sessions that are running too short or too long
- Handle problematic situations as needed
- Facilitate discussions with the course faculty regarding intellectual property

### **Chair**

#### **Self-Study Package (Board Review)**

- Collaborate with the AAFP Product Team prior to the live course to coordinate potential edits and intellectual property questions
- Provide leadership to the faculty regarding development of self-study materials, process, and strategy
- Answer questions from the AAFP Product Team throughout the planning process and package production cycle until all self-study package materials are finalized
- Work with Product Strategist, Learning Strategist, and Educational Technology Strategist to review and identify material that would benefit from additional coverage, additional resources, or adjustment for the at-home audience and to collaborate on its redesign
- Assist with fielding learner questions

- Work with AAFP staff and faculty to address new practice guidelines, black-box warnings, or adjustments to content as needed to maintain current recommendations

## **Chair**

### **Self-Study Package (National Course)**

- Collaborate with the AAFP Product Team prior to the live course to coordinate potential edits and intellectual property questions
- Provide leadership to the faculty regarding development of self-study materials, process, and strategy
- Answer questions from the AAFP Product Team throughout the planning process and package production cycle until all self-study package materials are finalized

## **Chair – Content Development**

### **Group Meeting**

- Attend group meeting
- Lead faculty in revising CME activity content as a group

## **Faculty**

### **Faculty – Content Development**

#### **Faculty – Content Development**

#### **FMX, Board Review, Multi-Format, National Courses**

- Select relevant course content
  - Use the educational plan to address identified gaps of current physician practice by creating course content to meet gaps in knowledge or practice as described in the course needs assessment, global learning objectives, and educational plan
- Produce/revise CME activities with the guidance of the faculty chair, Medical Director, and staff
- Develop relevant course content in accordance with the provided education plan and learning objectives
- Create content in accordance with AAFP editorial guidelines
- Follow AAFP PowerPoint Style Guide
- Ensure all AAFP intellectual property requirements are met
- Peer review content to determine/resolve commercial bias issues
- Adhere to deadlines for deliverables and materials to meet production schedule
- Contribute new innovations, perspectives, and insights into the continued improvement and expansion of CME activities
- Communicate effectively through telephone calls, e-mail, and conference calls
  - Answer questions from the project specialist and learning strategist through the planning process and production cycle until learning package content is final
- Work collaboratively with faculty chair, other content development faculty, and DCME staff
- Oversee and manage compliance with ACCME policies and regulations
- Other responsibilities as determined necessary



**Faculty – Content Development Self-Study Package (Board Review)**

- Collaborate with the enduring material staff prior to live course to prepare for audiovisual capture, adjust material as necessary, and coordinate planning
- Work with staff on site to facilitate audio and video capture
- Write five (5) test questions to be utilized as course materials during presentation or as post assessment and utilize learning strategist to augment the process if needed
- Re-record additional material if there are capture errors
- Ensure all materials contain appropriate intellectual property permissions and are provided to AAFP staff by designated dates
- Respond to user feedback and questions regarding lecture material
- Assist AAFP staff to reformat presentations for self-study product
- Write five (5) questions for each session and work with Learning Strategist to retool as necessary for the self-study package
- Participate in separate self-study package conference calls as necessary in preparation for onsite audio and visual capture
- Participate in review and revision of CME activity material upon review of data not limited to evaluation and usage
- Work with AAFP staff and faculty to address new practice guidelines, black-box warnings, or adjustments to content as needed to maintain current recommendations

**Faculty – Content Development Self-Study Package (National Course)**

- Collaborate with the AAFP staff prior to live course to prepare for audio and video capture, adjust material as necessary, and coordinate planning
- Work with staff to facilitate audio and video capture
- Write five (5) test questions to be utilized as course materials during presentation or as post assessment and utilize learning strategist to augment the process if needed
- Ensure all materials contain appropriate intellectual property permissions and are provided to AAFP staff by designated dates
- Re-record additional material if there are capture errors, if requested by AAFP

**Faculty – Content Development Interactive Content Redesign**

- Work with the CME Product Team (Product Specialist, Product Strategist, Learning Strategist, Educational Technology Strategist) to advise on suitability of content for interactivity, fidelity of interactive aspects to course content, and final approval of content

**Faculty – Content Development Group Meeting**

- Attend group meeting
- Active participation and involvement in content revision of CME activity as a group

## **Faculty – Presentation**

### **Faculty – Presentation**

#### **FMX, Board Review, Multi-Format, National Courses**

- Meet deadlines for deliverables, materials, and faculty forms to meet production schedule
- Deliver course material for the activity as created by the content developers
- Participate in question and answer sessions following presentations
- Communicate effectively through telephone calls, e-mail, and conference calls
  - Answer questions from the project specialist and learning strategist through the planning process and production cycle until learning package content is final
- Maintain current knowledge of subject matter
- Other responsibilities as determined necessary

### **Faculty – Presentation**

#### **All Self-Study Packages**

- Collaborate with the AAFP staff prior to live course to prepare for audio and video capture, adjust material as necessary, and coordinate planning
- Work with staff on site to facilitate audio and video capture
- Re-record additional material if there are capture errors, if requested by AAFP

### **Co-Faculty – Presentation**

#### **FMX**

- Meet deadlines for deliverables, materials, and faculty forms to meet production schedule
- Communicate effectively through telephone calls, e-mail, and conference calls
- Deliver course material for the activity
- Participate in questions and answers sessions following presentations
- Maintain current knowledge of subject matter
- Other responsibilities as determined necessary

## **Faculty – Other**

### **Peer Reviewer**

- Review activity content and deliverables, including PowerPoint presentations as required by activity, for relevancy, accuracy, and absence of bias
  - Meet deadlines for deliverables and materials to meet production schedule
  - Determine if the content aligns with the educational plan
  - Review content for the most up-to-date medical information based on scientific evidence, clinical accuracy, relevancy to primary care physicians' needs, and flow and organization
  - Conduct drug review to include accurate spelling, indication, off-label use, investigational use, approval in countries other than US, drug doses, and delivery methods

**ALSO/MCPS Faculty (including, but not limited to the following):**

- Involve the AAFP staff in planning and developing the course
- Involve advisory faculty members in all stages of the planning and development of the course
- Complete and submit all requested ALSO forms
- Perform local needs assessment
- Participate in pre-course faculty meeting
- Distribute ALSO syllabus to participants at least four weeks prior to course
- Be familiar with all slides associated with topic presentation
- Organize equipment and meeting rooms
- Ensure that the course runs smoothly and according to schedule
- Maintain consistency and integrity of ALSO program by ensuring course adheres to all requirements
- Ensure all course requirements are met
- Present opening announcements and introductions, including COI
- Present topics in a manner consistent with the course materials
- Be available for questions from faculty and participants
- Ensure COIs are resolved and disclosed to participants
- Performance observation and evaluation by ALSO Advisory Faculty member
- Function as an effective team leader, exhibit good leadership skills, convey a sense of order while role-playing in workstations
- Remain on-site during the entire course
- Other responsibilities as determined necessary

#### **Faculty – FMX General Session**

- Meet deadlines for deliverables, materials, and faculty forms to meet production schedule
- Deliver course material for the activity as created by the content developers, if applicable
- Participate in question and answer sessions following presentations, if applicable
- Communicate effectively, via representative if applicable, with project specialist
- Be available for book signings, if applicable, date and time to be mutually agreed upon
- Other responsibilities as determined necessary

#### **Activity Deliverables**

Deliverables will vary based on the CME activity. However, they may include the following: PowerPoint presentation with detailed speakers' notes, speaker forms, peer review forms, session specific questions and answers, course content revision to multiple formats, COI Form updates, and NFEI training, among others. Actual activity requirements and due dates are integrated into timetables in the applicable faculty service agreement. Non-compliance may result in honorarium penalties.

Faculty members will be provided a Pre-Presentation Checklist to utilize as a supplemental guide to assist in aligning the content of the CME activity with performance based topics and the educational plan.

Faculty members are also required to disclose to the AAFP and learners when unlabeled use of a

commercial product or an investigational use not yet approved for any purpose is discussed during an educational activity. The intent of the policy is not to prohibit or limit the exchange of views in scientific and educational discussions, but to ensure that faculty disclose to learners that such discussion will take place. As such, faculty must complete the Disclosure of Unlabeled/Investigational Uses of Products Form, which will be provided to faculty.

Depending on the CME activity, either the faculty member will own all of the materials developed for the course or the AAFP will be deemed the owner and the materials developed for the course will be considered works made for hire. In the former case, the faculty member must complete the Consent and License for Presentation/Materials Form. In the latter case, the faculty member must complete the Authorship Form for Presentation/Materials. The applicable form will be provided to faculty.

### **Completed PowerPoint Presentation/Handouts**

- Meet due dates listed in the applicable faculty service agreement
- PowerPoint that follows the AAFP PowerPoint Style Guide
- Outline of talking points embedded within the speakers' notes
- Pre and post test questions to check for knowledge, as appropriate
- Audience Response System (ARS) questions, as appropriate
- Course materials (additional resources), as appropriate
- Tools incorporated into the session as provided by the AAFP to help the physician learner (e.g., checklists, flow sheets, summary)
- Resources for continued study, as appropriate (e.g., journal articles, websites, etc.)

### **Faculty Resources**

- To assist faculty, additional resources regarding increasing interactivity in sessions, writing test questions, and designing courses are available through the AAFP faculty development website at [www.aafp.org/cme/facultydevelopment](http://www.aafp.org/cme/facultydevelopment)
- Faculty are should integrate practice management tools into CME activity content available through the FPM Toolbox available at <http://www.aafp.org/fpm/toolBox/viewToolBox.htm>
- The AAFP has entered into a contractual agreement with Thomas Jefferson University for use of the Thomas Jefferson University's clinical image database. This database allows use of images, for a nominal fee, in CME produced by the AAFP. Access for faculty may be provided by the project specialist for individual CME activities.
- The AAFP has entered into a contractual agreement with Dr. Richard Usatine for use of some of his medical images from his book, *The Color Atlas of Family Medicine*, and for use of his dermatology images in the Interactive Dermatology Atlas for CME produced by the AAFP for a nominal fee. Access for faculty may be provided by the project specialist for individual CME activities.

### **Presentation Information**

- Speak from an outline, do not read a lecture
- Avoid creating extraneous sounds (e.g., shuffling papers)
- When appropriate, use case illustrations from personal experience to make material "real" to the audience
- Remember to remain HIPAA compliant by not revealing any identifying information

## **Evaluation**

- The success of the CME activity is monitored by an evaluation of the overall activity, as well as session level evaluations. The activity results will be shared by the project specialist with the faculty chair as a basis for setting new strategy and recommendations for continuous improvement. In order to protect confidentiality, the faculty will individually receive their evaluations. However, the faculty chair will receive all faculty members' evaluations for quality purposes.
- Each role within the team will be evaluated by others (e.g., the role of the chair will be evaluated by the content development faculty, the presentation faculty, and the project manager). The evaluation will measure the function of the team and effectiveness. Evaluations will be shared with the faculty chair, CMED staff, and CMED Medical Director (as appropriate).

## **AAFP Staff Roles and Responsibilities**

Faculty and staff should work collaboratively on matters directly related to the development of course materials, educational goals, process, implementation, coordination, and evaluation.

### **CMED Medical Director**

- Staff Physician
- Work with faculty to create CME activities based on the AAFP Curricular Framework
- Work with staff as oversight for aspects of CME activities with regard to clinical content, educational plans and course design, format, integration of performance measures, and outcomes reporting related to course evaluation
- Faculty liaison

### **Learning Strategist**

- Participate as a member of the project team (learning strategist, product strategist, project specialist)
- Provide in-depth understanding of instructional issues in traditional, blended, enduring, and online courses
- Possess an understanding of the CME environment, the healthcare environment, pertinent regulations, and compliance guidelines
- Create needs assessments for all CME sessions
- Create learning objectives that will enable the faculty to prepare evidence-based up-to-date activities
- Work with faculty to design and develop course curricula and instructional materials
  - Program educational plans
  - Outcomes measures
- Provide follow-up assistance and support to faculty as they incorporate new curricula and materials into their courses
- Develop educational outcome measures reports for CME activities

### **Project Specialist – Course**

- Participate as a member of the project team (learning strategist, product strategist, project specialist)
- Work collaboratively with chair and faculty

- Facilitate conference calls and take meeting minutes during calls to be disseminated to committee members
- Facilitate planning, budgeting, scheduling, resource allocation, negotiation, and monitoring and auditing of project
- Staff person responsible for integrating all aspects of the activity
  - Works with faculty: submit faculty forms, adhere to deadlines, and process expense vouchers
  - Work with chapter staff: submit faculty info, CV, bio, headshot, PowerPoint presentation and handout
  - Enter and track intellectual property requests
  - Review monthly general ledger and track actual expenses in budget worksheets
- Help ensure all AAFP intellectual property requirements are met prior to the activity being made available to users
- Facilitate production of speaker notes, handouts and evaluations for enduring materials to be available online or mailed
- Facilitate coordination of on-site services for meeting preparation, including room setup, A/V needs, speaker handouts, notes, and evaluations, etc.
- Manage faculty contracts, honorarium, and reimbursements

#### **Project Specialist – Multi-Format Product**

- Facilitate planning, budgeting, scheduling, resource allocation, negotiation, and monitoring and auditing of project
- Participate as a member of the project team (learning strategist, product strategist, project specialist)
- Work collaboratively with chair and faculty
- Ensure that AAFP editorial standards are met
- Help ensure that AAFP intellectual property standards are adhered to

#### **Product Strategist**

- Participate as a member of the project team (learning strategist, product strategist, project specialist)
- Manage the product lifecycle
- Develop marketing strategy
- Develop product pricing
- Create strategies for new product development

#### **FMX Staff**

- Facilitate planning, budgeting, scheduling, resource allocation, negotiation, and monitoring and auditing of project
- Facilitate coordination of faculty schedules, forms and handouts
  - Forms completed by due date
  - Contracts returned and signed appropriately
- Manage faculty contracts, honoraria, and reimbursements
  - Stipend, honoraria, and expenses paid
- Facilitate production of handouts for website, schedule builder, and flash drives
  - Handouts are completed and ready by deadlines

- Facilitate coordination of on-site services for meeting preparation, including room setup, A/V needs, speaker handouts, notes, and evaluations, etc.

### **Education Technology Strategist**

- Design materials and strategies that facilitate the integration of a variety of technologies into the instructional process
- Advise and support faculty with technology-based learning projects that are consistent with best practices in instructional design principles and theories
- Coordinate the development and delivery of instructional technology and distance education
- Design, develop, coordinate, and conduct instructional technology training sessions and workshops to prepare faculty members to teach online

### **CME Compliance and Accreditation Staff**

- Serve as a guide to ensure compliance during CME development
- Offer support for faculty conflict of interest during review and mitigation process
- Review CME content for certification

### **Editorial Staff – specific to CME activities involving written, audio, or other enduring materials (FPE/FPA)**

- Identify and contact potential faculty (i.e. author, medical editor, reviewers)
- Obtain signed faculty service agreement and COI Form
- Provide selected faculty with educational plan
- Contract with medical artist
- Conduct review and copyright of content submission, including quiz
- Process reference verification and intellectual property requests
- Process accreditation application
- Conduct edit of manuscript, quiz, etc.
- Proofread layout
- Work with marketing to coordinate printing and mailing
- Coordinate printing with vendor
- Coordinate recording between faculty and studio
- Review and edit transcript and coordinate audio edit with vendor
- Prepare and post content online
- Process payment for faculty

### **ALSO/MCPS Staff**

- Work with advisory board to revise curriculum
- Work with instructional design team in building monthly online education for participants
- Work with advisory board and editorial board on ongoing revision of the ALSO curricula, slides, and course materials
- Work with regional course directors and coordinators who administer ALSO courses in the US

### **Other Staff**

- Supply resources to expedite the development of the course (e.g., staff editor, learning strategist, product specialist)
- Work with faculty: edit submitted PowerPoint and supplemental information, correspond

- with faculty to answer any queries
- Edit recorded audio and work with editing vendor to make appropriate changes
- Work with MultiMedia staff to synchronize audio with edited PowerPoint presentations as necessary by CME activity

## **ADMINISTRATIVE ELEMENTS**

### **Compensation/Honoraria**

The AAFP recognizes the time and effort it takes to create, revise, and refine content, and honoraria is designed to compensate faculty for multiple levels of involvement during the creation and presentation of educational activities. However, the AAFP does not compensate faculty members who only serve as Co-Faculty for FMX.

Honorarium for self-study package CME activities will be payable upon completion of post-production of the self-study package.

Payment to faculty must be in compliance with AAFP's honorarium policy and is an additive calculation based on designated roles and responsibilities identified in the faculty service agreement.

### **Travel Expenses**

Anticipated starting and ending times specified in the presenting/moderating timetable in the faculty service agreement are subject to minor modifications because of unanticipated occurrences. All faculty members are required to be at the place of presentation a sufficient period of time prior to the scheduled time of commencement. For live courses, the CME Activity Chair remains on site until the conclusion of the commitment. Notification of exceptions to this policy must be made to the project specialist in writing prior to arrival on-site.

All faculty members (except FMX Co-Faculty) will be reimbursed for non-refundable coach airfare to and from their originating airport by the shortest and most expedient route. To receive the lowest discounted coach class fare possible, the AAFP requests that airfare be purchased a minimum of four weeks in advance of the activity's start date. By faculty member request, the use of a travel agent designated by the AAFP is acceptable.

All faculty members (except FMX Co-Faculty) who elect to drive their own personal vehicles to and from the destination will be reimbursed at the lower of (a) the current IRS standard mileage rate or (b) the non-refundable coach airfare to which they would be entitled to under the paragraph set forth above. In addition, parking for the vehicle will be reimbursed for each speaking day. The AAFP does not reimburse for rental cars, unless pre-approved by the project specialist.

To receive travel expense reimbursements, all faculty members must (i) complete an expense voucher, which is available upon request, within 60 days after completion of the CME activity, or if sooner required, by the deadline indicated on the voucher form; and (ii) submit receipts with the reimbursement request.

### **Activity-Specific Matters**

- **FMX**
  - Faculty Members (except Co-Faculty) are responsible for making their own hotel arrangements. The stipend (as set forth in the applicable faculty contract) provided to faculty members for each speaking day is inclusive of ground transportation, food



- allowance, and hotel arrangements.
- No receipts related to hotel, ground transportation, or food need to be submitted.
- **National Courses, Board Review**
  - Hotel arrangements will be made by the project specialist. Room and tax will be charged to the AAFP master account. Faculty members are responsible for all incidentals. Additional nights not associated with faculty responsibilities are the responsibility of the faculty member. If hotel dates need to be adjusted, faculty must contact the project specialist at least 72 hours in advance. Ground transportation to and from the airport will be reimbursed.
  - The applicable faculty contract sets forth the daily food allowance.
  - Faculty members must complete an expense voucher and submit receipts with the reimbursement request (i) for transportation fees and (ii) for food, which will only be reimbursed up to the amount set forth in the faculty contract.
- **Multi-Format, Chapter Lecture Series**
  - Faculty members are responsible for making their own hotel arrangements. One overnight hotel stay is permitted, unless the meeting time/location warrants additional time due to travel constraints. Reimbursement for two nights must be pre-approved by the project specialist prior to reservations being scheduled. Ground transportation to and from the airport will be reimbursed.
  - The applicable faculty contract sets forth the daily food allowance.
  - Faculty members must complete an expense voucher and submit receipts with the reimbursement request for (i) transportation fees and (ii) food, which will be reimbursed only up to the amount set forth in the faculty contract.

### **Commercial Support**

The AAFP accepts both financial and in-kind commercial support for its CME activities and topics with a demonstrated need for family medicine physician education, with the exclusion of all Board Review activities. Inclusion of a financially supported program in the activity does not constitute the AAFP's endorsement of a product or service. All supporting companies will be required to sign an agreement to abide by all ACCME Standards for Commercial Support. The AAFP will notify faculty if/when commercial support has been accepted.

All AAFP CME activities are approved for AAFP Prescribed and AMA Category 1 credit; therefore, compensation paid to faculty is not required to be reported under the Open Payments Program pursuant to the Physician Payments Sunshine Act.

In the case of in-kind support, the AAFP coordinates all shipment details with the commercial supporter and instructs the commercial supporter not to ship any in-kind materials or other materials to the faculty or learners in conjunction with the corresponding CME activity. The only exception to this is when the commercial supporter provides the AAFP with in-kind support for a clinical procedures workshop in the form of a controlled substance requiring a licensed physician to receive and administer the controlled substance. In this situation, the AAFP will notify the applicable faculty member in advance and may ask for such faculty member's license number and address and for such faculty member to complete the commercial supporter's documentation. In such case, the commercial supporter may or may not exclude from reporting under the Open Payments Program the provision of the controlled substance to the faculty member.

### **Miscellaneous**

- The AAFP has the right to direct a faculty member to discontinue any activity constituting a

violation of AAFP policy, as well as any federal, state, or local laws.

- All branded artwork associated with the presentation, including the project logo and AAFP's logo, is and remains property of the AAFP and shall not be used or reproduced without the express written permission of AAFP.



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