

**North American Naturopathic Continuing Education
Accreditation Council
NANCEAC**

**ACCREDITATION
APPLICATION
AND
INSTRUCTIONS
2017**

Glossary of Terms

CE: Continuing education

CE Activity: An in-person CE event at which participants are granted CE credit for attendance.

CE Credit Hour: One contact hour (60 minutes) of an accredited continuing education activity (CE activity).

CE Provider: The organization applying to become an accredited producer/provider/originator of ongoing CE activities. The CE Provider can be a large or small company, or a sole-proprietorship.

CE Program Director: The individual in the organization who is responsible for ensuring that the CE Provider and all CE activities adhere to NANCEAC standards. The CE Program director is responsible for the content of the CE activity. The CE Program director may be the same person as the Presenter.

Educational need (practice gap): The difference between naturopathic physicians' current knowledge, competence or performance and what is needed for safer and/or more effective practice. Each CE activity must address an educational need in the naturopathic profession. Educational needs are divided into the three general categories: knowledge, competence, or performance.

Evidence-informed clinical practices: Therapeutics and clinical practices that are informed by the best available knowledge, experience, theory, and research.

Financial or Vested interest: Any interest of the CE provider that would accrue to the provider. This includes, but is not limited to, employment, owning stock, or having a significant relationship (personal or otherwise) that could potentially lead to gain or benefit from the affiliation.

NANCEAC: North American Naturopathic Continuing Education Accreditation Council.

Participant: An individual naturopathic physician who is participating in the CE activity.

Presenter (Faculty): The individual who develops the content of the CE activity and presents the information in the CE activity to the participants. The Presenter may or may not be the same person as the CE Program Director. The Presenter may or may not have originally developed the content of the CE activity. Regardless of CE activity development, the CE Program director is always responsible for the content.

Verifiable educational activity: Verifiable educational activities are activities that were previously approved for CE credit hours by a North American regulatory authority or a CE-accrediting body (e.g.: ACCME, ACPE, OBNM, etc.). To demonstrate that the CE activity was a verifiable educational activity, a copy of the documentation approving credit hours must be submitted.

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Eligibility requirements to become a NANCEAC-accredited CE Provider

The North American Naturopathic Continuing Education Accreditation Council (NANCEAC) accredits providers of continuing education activities that are relevant to naturopathic physicians. CE providers who meet the eligibility requirements and demonstrate that they meet NANCEAC standards will be accredited. The purpose of accreditation is to assure the highest quality of continuing education activities.

Full Accreditation: Term of accreditation is 5 years.

- Must be **in operation for a minimum of one (1) year**.
- Have planned, implemented, and evaluated **at least two (2) verifiable educational activities** presented in person to health care professionals.
- Must **offer recurring in-person CE activities**.
- Activities must be **free from commercial bias**.
- **Must offer education and training in skills recognized and accepted by the profession**
- The CE activity must:
(1) address a gap in knowledge, competence, or performance in the practice of naturopathic medicine, and
(2) provide education specific to the practice of naturopathic medicine.
- **Once accredited NANCEAC Financial Disclosure and Attestation form must be completed by all individuals involved in CE activity development and execution.**

Probationary Accreditation: Term of accreditation is 1 year.

- The organization has been in operation for less than one year and/or has not offered CE activities previously but **plans to offer ongoing in-person CE activities**.
- Must **offer recurring in-person CE activities**.
- Activities must be **free from commercial bias**.
- **Must offer education and training in skills recognized and accepted by the profession.**
- The CE activity must:
(1) address a gap in knowledge, competence, or performance in the practice of naturopathic medicine, and
(2) provide education specific to the practice of naturopathic medicine.
- **Once accredited NANCEAC Financial Disclosure and Attestation form must be completed by all individuals involved in CE activity development and execution.**

If the organization meets the above eligibility requirements for either level of accreditation, it may apply to become an NANCEAC-accredited CE Provider. The organization must submit a completed application, with all necessary supporting documentation. If approved, the organization will be required to uphold NANCEAC's policies and procedures.

How does a CE Provider become accredited by NANCEAC?

- 1) The organization must meet the eligibility requirements for NANCEAC accreditation.
- 2) Submit the following items:
 - a) A completed initial application together with supporting materials and documentation
 - b) Non-refundable initial application fee, in the form of a check or money order in US dollars made payable to FNMRA. Once NANCEAC has begun the review process, no refund will be considered. If the applicant formally withdraws the application prior to the start of the review process, the applicant may be eligible for a **50%** refund at the discretion of NANCEAC.
- 3) Accredited organizations must adhere to NANCEAC standards and policies.

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Application review process and time line

Once the completed application is received, NANCEACC staff and the NANCEAC review committee will evaluate the submitted application and documentation. The NANCEAC review committee will recommend approval or denial to the FNMRA Board of Directors. The Board of Directors will review and make the final decision on approval or denial. The final notification sent to the applicant will indicate that the Board has either awarded accreditation, or if denied, the reasons for denial.

If Full Accreditation is awarded, the term of approval is 5 years. At the end of the approval period, the CE Provider is responsible for submitting a renewal application in a timely manner.

If Probationary Accreditation is awarded, the term of approval is 12 months. At the end of the approval period, the CE Provider is responsible for submitting an application to be considered for Full Accreditation.

Note: The awarding of accreditation is explicitly designated to the organization submitting the application. Satellite organizations, cooperating organizations, or divisions of the CE Provider are required to submit a separate application.

Timeline

<u>Completed Application received</u>	<u>NANCEAC review</u>	<u>FNMRA Board of Directors decision</u>	<u>Notification of decision</u>
by January 1	January-February	March	April 1
by April 1	April-May	June	July 1
by July 1	July-August	September	October 1
by October 1	October-November	December	January 1

Instructions for submitting an application

- 1) The application must be complete. Incomplete or unsigned applications will be returned without review.
 - a) All materials should be in a binder. Use Addendum 1 as the table of contents, and create one tab for each of the four (4) sections of the application. All supporting documentation must be placed in the appropriate tab. In addition, the entire application should be submitted in pdf format on a CD-ROM or USB flash drive.
 - b) A checklist of all required documentation is listed in Addendum 1.
 - a) A check or money order in US dollars for the initial application fee must be included. The application fee is non-refundable once NANCEAC has begun the review process. If the applicant formally withdraws their application prior to the start of the review process, the applicant may be eligible for a **50%** refund at the discretion of NANCEAC. Make the check or money order payable to FNMRA.
- 2) Whether the application is accepted or denied, the application and supporting documentation will not be returned. A copy of the application should be kept by the organization.

<u>Description</u>	<u>Full Accreditation for 5 years</u>	<u>Probationary Accreditation for 12 months</u>
Initial application fee	\$2000 (50% discount for first-time applicants that apply before December 2017)	\$750 (after 1 year the Provider must submit an application to be considered for Full Accreditation)
continuing or annual recognition fee	\$250 +\$50 per activity	\$250 +\$50 per activity
reconsideration fee	\$500	\$500

- 3) Please submit one hard copy of your application and one digital copy in pdf format. Send the package to:

NANCEAC c/o FNMRA
 9220 SW Barbur Blvd
 Suite 119, #321
 Portland, OR 97219

Overview of the Application

The application is divided into six sections; four of these sections include two to three NANCEAC Standards in each Section. The following pages ask for specific information and give detailed instructions about which documents, materials, and addenda to include with the application.

Contact Information

Section 1: Standards for Providers (Standards 1-3)

Standard 1: Mission and Goals

Standard 2: Educational Needs Assessment

Standard 3: Fiduciary Relationships and Commercial Bias

Section 2: Standards for Administrators (Standards 4 & 5)

Standard 4: CE Program Director

Standard 5: Record Keeping

Section 3: Standards for Activities (Standards 6-8)

Standard 6: Learning Objectives and Subject Matter

Standard 7: Presenter

Standard 8: Methods and Materials

Section 4: Standards for Evaluation (Standards 9 & 10)

Standard 9: Learning Assessment

Standard 10: Evaluation of Activities

Addenda

Contact Information

Please check the box below to indicate which type of NANCEAC accreditation is being sought.

- Full Accreditation 5 years
- Probationary Accreditation 1 year

Primary point of contact for NANCEAC-related communications

Name	
Title	
Physical Address	
City and State or Province	
Postal code	
Telephone	
Fax	
E-mail	

Secondary contact information

Name	
Title	
Physical Address	
City and State or Province	
Postal code	
Telephone	
Fax	
E-mail	

CE Program Director contact information

Name	
Title	
Physical Address	
City and State or Province	
Postal code	
Telephone	
Fax	
E-mail	

Contact Information-continued

Name of CE Provider as it should appear on accreditation certificate:
Web Address:
Alternate Web Address:
Web address where CE activities are posted:
CE Provider Type (select <u>one</u> of the following):
<input type="checkbox"/> College/ School
<input type="checkbox"/> Educational Company
<input type="checkbox"/> Commercial entity
<input type="checkbox"/> Healthcare Services Provider or Clinic
<input type="checkbox"/> National Association
<input type="checkbox"/> State or Local Association
<input type="checkbox"/> Other (please specify)

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Section 1: Provider Standards

Standards (1 of 10)

Standard 1–Mission and Goals

The CE Provider must develop a mission statement that states:

- How the CE Provider will address the educational needs of naturopathic physicians;
- How the CE Provider will address the health care needs of the public (relevance to the health care needs of the public); and
- The intended outcome of the CE (i.e., how the activity will improve the participant’s contributions to quality health care and pursuits of professional goals: through changes in competence, performance, or patient outcomes).

Documentation that should be attached to the application demonstrating adherence to Standard 1:

- 1) Mission statement that adheres to the above guidelines.
- 2) Copy of the Articles of Incorporation in the state or province where the organization is registered, indicating the type of organization.

Section 1: Provider Standards

Standards (2 of 10)

Standard 2–Educational Needs Assessment

The CE Provider must assess the educational needs of naturopathic physicians. The provider should identify gaps between what naturopathic physicians currently do in practice and what is desired in practice. To assess educational needs (practice gaps), the provider may use questionnaires/surveys, interviews, focus groups, and literature review; however, periodic surveys of prospective participants are required. Each CE activity must address an educational need in the naturopathic profession.

Educational needs are divided into three general categories:

- Knowledge: philosophy, research, biomedical sciences, public health
- Competence: evidence- informed clinical practice, public health
- Performance: clinical skills, hands-on therapeutics

The CE Provider must offer education and training in skills recognized and accepted by the profession in areas pertaining to one or more of the three areas listed above.

Documentation that should be attached to the application demonstrating adherence to Standard 2:

- 1) For Full accreditation:
 - a) Samples of needs assessment instruments (post-activity evaluation forms, survey of profession, literature review, etc.);
 - b) Summary of data from the needs assessment survey: A sample of the data collected;
 - c) List of educational needs (practice gaps) identified by the needs assessment;
 - d) Explanation of how identified need is related to activities being offered; and
 - e) Indication of how often educational needs assessments will be performed.
- 2) For Probationary accreditation:
 - a) Examples of needs assessment instruments that will be used (post-activity evaluation forms, survey of profession, literature review, etc.);
 - b) List of educational needs (practice gaps) identified by the needs assessment;
 - c) Explanation of how identified need will be related to activities being offered; and
 - d) Indication of how often educational needs assessments will be performed.

Section 1: Provider Standards

Standards (3 of 10)

Standard 3–Fiduciary Relationships and Commercial bias

The CE Provider must ensure that all activities, from initial development to final execution, are independent from commercial bias or interest, or conflict of interest (real or apparent).

The CE Provider may not accept financial support from any entity that makes its support contingent on having control over any aspect of the provider's CE activities.

If the CE Provider receives any external financial or commercial support, the Provider must disclose, in writing, all terms and conditions of that financial or commercial support. Financial or commercial support includes but is not limited to grants, sponsorships, or the donation of products or services, such as food or promotional materials.

Once accreditation has been awarded, the disclosure of financial or commercial support must be made available to NANCEAC (by completing the *Financial Disclosure and Attestation Form*) PRIOR to each CE activity.

Product distribution to participants, advertising in the conference room, and/or promotional logos on educational materials are NOT allowed.

Documentation that should be attached to the application demonstrating adherence to Standard 3:

1) For Full accreditation:

- a) Policies and procedures for handling commercial bias and conflict of interest;
- b) Samples of promotional materials that are given to participants;
- c) Samples of educational materials that are given to participants; and
- d) Complete *Fiduciary Disclosure Worksheet* (Addendum3).

2) For Probationary accreditation:

- a) Policies and procedures for handling commercial bias and conflict of interest;
- b) Examples of promotional materials that will be given to participants;
- c) Examples of educational materials that will be given to participants; and
- d) Complete *Fiduciary Disclosure Worksheet* (Addendum3).

Section 2: Administration Standards

Standards (4 of 10)

Standard 4–CE Program Director

The CE Provider must identify an individual who is responsible for ensuring adherence to all NANCEAC Standards. This individual will be referred to as the CE Program Director. The CE Program Director responsibilities include, but are not limited to: ensuring adherence to all NANCEAC Standards, supervising the development of all CE activities, the content of all CE activities, and the evaluation of all CE activities.

Documentation that should be attached to the application demonstrating adherence to Standard 4:

- 1) CV of CE Program Director; and
- 2) Signed *Affidavit of Adherence* (Addendum 2).

Section 2: Administration Standards

Standards (5 of 10)

Standard 5–Record keeping

The CE Provider must accurately calculate* and properly document the CE credit hours applied to any CE activity. Once an activity is completed by a participant, the CE Provider must present documentation stating the credit hours earned by completing (attending/participating in) the CE activity. The CE Provider must employ a method for verifying attendance or participation in the activity. Records of credit hours earned must be maintained for five (5) years in a secure and confidential manner, and must be made available to any participant upon request.

Documentation that should be attached to the application demonstrating adherence to Standard 5:

- 1) Description of the method is/will be used for verifying attendance/participation in CE activities
- 2) Examples of attendance records that include the following information:
 - a) name and address of participant;
 - b) license or registration number of participant;
 - c) regulatory jurisdiction of participant;
 - d) date and location of activity;
 - e) title of CE activity and subject matter; and
 - f) duration of CE activity and number of CE credit hours earned by each participant.
- 3) Example of documentation the participant receives upon completion of a CE activity

*see *Calculating CE credit hours* (Addendum 6) for details

Section 3: Activity Standards

Standards (6 of 10)

Standard 6–Learning Objectives

The CE Provider must develop learning objectives that address the educational needs that were identified in the needs assessment (Standard 2). Learning objectives are the stepping stones that take the participant from the identified educational need to the desired result. These objectives must be specific and measurable, and should shape all aspects of the CE activity including activity content, assessment of participant learning, and evaluation of the activity.

Learning objectives should be listed at the beginning of each activity in the educational materials.

Because learning objectives are meant to be specific and measurable, objectives should be stated in terms of active verbs that can be measured.

The CE activity must:

- (1) address a gap in knowledge, competence, or performance in the practice of naturopathic medicine; and
- (2) provide education in new, review, experimental research, or specialized education, and/or training specific to the practice of naturopathic medicine.

Example of development of Learning Objective from a Needs Assessment

<u>Current Practice</u>	<u>Ideal Practice</u>	<u>Educational Need (Practice Gap)</u>	<u>Type of Practice Gap: select one</u>	<u>Learning Objective</u>
over-prescription of opioids to chronic pain patients	proper opioid prescribing to chronic pain patients	need for up-to-date evidence on safe and effective opioid prescribing	<input checked="" type="checkbox"/> Knowledge <input type="checkbox"/> Competence <input type="checkbox"/> Performance	Identify current guidelines and best practices for opioid prescribing

Documentation that should be attached to the application demonstrating adherence to Standard 6:

- 1) For Full accreditation:
 - a) Description of the process that is used to develop learning objectives from a needs assessment; and
 - b) Samples of previous measurable learning objectives.
- 2) For Probationary accreditation:
 - a) Description of the process that will be used to develop learning objectives from a needs assessment; and
 - b) Measurable learning objectives that may be used in future CE activities.

Section 3: Activity Standards

Standards (7 of 10)

Standard 7–The Presenter(s)

The Presenter must be selected based on qualifications, and his/her experience and ability to meet the identified educational need and to teach the subject matter. The CE Provider must ensure that the Presenter develops the activity according to the identified educational need (Standard 2) and the stated learning objectives (Standard 6).

Documentation that should be attached to the application demonstrating adherence to Standard 7:

- 1) CV(s) of presenter(s) involved in CE activity development; and
- 2) The relationship between the presenter(s) and CE Provider (e.g., employee, non-gratis, business partner, etc.).

Section 3: Activity Standards

Standards (8 of 10)

Standard 8–Methods and Materials

The CE Provider must encourage active participation and include active learning exercises in each CE activity. Active learning can be accomplished by using a variety of techniques including pre- and post-testing, quizzes, case studies, simulation exercises, problem-solving, group discussion, etc. The educational materials for each CE activity should include additional sources of information and/or reference tools.

Documentation that should be attached to the application demonstrating adherence to Standard 8:

- 1) For Full accreditation:
 - a) Description or samples of methods used to promote active participation in CE activities; and
 - b) A sample of a previous CE activity syllabus/outline.
- 2) For Probationary accreditation:
 - a) Description or examples of methods that will be used to promote active participation in CE activities; and
 - b) An example of a planned CE activity syllabus/outline.

To evaluate adherence to Standard 8, NANCEAC will consider the documents submitted in Standard 3 as well as the documents requested above.

Section 4: Standards for Evaluation

Standards (9 of 10)

Standard 9–Learning assessment

The CE Provider must coordinate with the Presenter to create learning assessments. Learning assessments should give the participants an opportunity to evaluate/measure their achievement of the learning objectives for the activity. The CE Provider can only award CE credit hours to a participant if the participant's learning has been assessed in terms of the learning objectives.

The results of the learning assessments should be used to improve the quality of CE activities and evaluate overall achievement of learning objectives (Standard 6).

Documentation that should be attached to the application demonstrating adherence to Standard 9:

- 1) For Full accreditation:
 - a) Description of how participants are assessed in terms of learning objectives; and
 - b) Copy of a learning assessment instrument that has been completed by a participant, or
 - c) Compiled results of all participants from previous learning assessment.

- 2) For Probationary accreditation:
 - a) Description of how participants will be assessed in terms of learning objectives; and
 - b) Example of learning assessment to be completed by participants.

Section 4: Standards for Evaluation

Standards (10 of 10)

Standard 10–Evaluation of activities

The CE Provider must have a structure in place for self-evaluation of each CE activity. As part of that evaluation process, participants must be provided the opportunity to evaluate each CE activity. A summary of the results of the evaluations must be provided to NANCEAC in the *Post-Activity report*. The feedback from the evaluations should be used to improve the quality of CE activities.

At a minimum, participants should provide feedback on the following elements:

- how well the educational needs were achieved;
- quality of presenters;
- usefulness of educational material;
- applicability to the practice environment;
- effectiveness of teaching and learning methods, including active learning;
- effectiveness of the delivery of the CE activity (e.g., size of screen, handouts, size of room, number of participants, etc.);
- appropriateness of learning assessment activities;
- compliance with notification requirement of financial support or conflict of interest; and
- appearance of bias or commercialism in the activity.

Documentation that should be attached to the application demonstrating adherence to Standard 10:

- 1) For Full accreditation:
 - a) Description of how CE Provider or Presenter will encourage participants to complete the evaluation form; and
 - b) Sample of a previous evaluation form.
- 2) For Probationary accreditation:
 - a) Description of how CE Provider or Presenter will encourage participants to complete the evaluation form; and
 - b) Example of a planned evaluation form.

Maintenance of Accreditation

Continuous accreditation is dependent upon compliance with standards, notification, accurate reporting, and monitoring.

Notification:

During the term of accreditation, the CE Provider or CE Program Director must notify NANCEAC, in writing, when any changes are made that could alter the CE Provider's ability to adhere to NANCEAC standards. Examples of changes include, but are not limited to: change of ownership, legal status, or control; change in a source of financial support; or change in CE activity delivery.

The CE provider must notify NANCEAC 30 days prior to any change. NANCEAC may request additional information to evaluate the CE Provider's ability to continue to meet NANCEAC standards, if it is unclear whether a proposed change is substantive.

If NANCEAC determines that the proposed change is likely to take the CE Provider out of compliance, NANCEAC may re-evaluate the provider's accreditation status and take appropriate action. An additional fee may be charged for this re-evaluation.

If the CE Provider fails to submit requested changes, or submits changes to NANCEAC with less than thirty (30) days' notice, an additional fee may be charged, or accreditation may be suspended or revoked.

Accurate reporting:

During the term of accreditation, the CE Provider must submit the required NANCEAC-reporting forms in a timely manner, and accurately and fully report the information requested. The accredited Provider must submit the following NANCEAC-reporting forms for each CE activity: (1) the *CE Activity Development Worksheet* (see Addendum 4 for requirements), and (2) *Post-Activity Report* (see Addendum 5 for requirements).

Inaccurate or misleading reporting may result in the loss of accreditation for up to five (5) years or permanent revocation of status.

Monitoring:

During the term of accreditation, CE Providers must respond to requests for information, and must undergo periodic monitoring to assure full compliance with NANCEAC standards.

At its discretion, NANCEAC may audit a CE activity by appointing a member of the Board or other designee to conduct a review of activity materials to verify content and adherence to standards, or to attend the CE activity. If a NANCEAC representative attends a CE activity, the representative will not be charged any registration or entry fees. The CE Provider will be notified of the outcome of the audit by NANCEAC.

Refusal to submit to an audit may result in the loss of accreditation for up to five (5) years or permanent revocation of status.

Documentation Checklist

This page should be used as a checklist and as a table of contents for the binder. The binder should include tabs for all four sections of the application. Supporting documentation should be placed in the appropriate tab (e.g., *Fiduciary Disclosure Worksheet* (Addendum3) supports Standard 3 and should be placed in Section 1 tab of the binder). In addition the entire application should be submitted in pdf format on a CD-ROM or USB flash drive.

When the documentation required for each Standard has been completed, the page number should be placed in the far right column.

Section	Standard and Documentation required	Page
Contact Information		
Section 1: Provider Standards (Standards 1-3)	Standard 1–Mission and Goals	
	Mission statement	
	Articles of Incorporation	
	Standard 2–Educational Needs Assessment	
	Samples/Examples of needs assessment instruments	
	Summary of data collected from the needs assessment instruments	
	List of educational needs (practice gaps) identified by the needs assessment	
	Explanation of how identified need is related to activities being offered	
	Indication of how often educational needs assessments will be performed	
	Standard 3–Fiduciary Relationships and Commercial bias	
	Policies and procedures for handling commercial bias and conflict of interest	
	Samples of promotional materials that are/will be given to participants	
	Samples of educational materials that are/will be given to participants	
	Completed <i>Fiduciary Disclosure Worksheet</i> (Addendum3)	

Section 2: Administration Standards (Standards 4 & 5)	Standard 4–CE Program Director	
	CV of CE Program Director	
	Signed <i>Affidavit of Adherence</i> (Addendum 2)	
Section 2: Administration Standards (Standards 4 & 5)	Standard 5–Record keeping	
	Description of the method used for verifying attendance/participation in CE activities	
	Sample/Examples of attendance records	
	Sample/Example of documentation the participant receives upon completion of a CE activity	
Section 3: Activity Standards (Standards 6-8)	Standard 6–Learning Objectives	
	The process that will be used to develop learning objectives from a needs assessment:	
	Full accreditation: Examples of previous measurable learning objectives	
	Probationary accreditation: Measurable learning objectives that may be used in future CE activities	
	Standard 7–The Presenter(s)	
	CV(s) of presenter(s) involved in CE activity development	
	The relationship between the presenter(s) and CE Provider	
	Standard 8–Methods and Materials	
	Description or samples of methods used to promote active participation in CE activities	
	Provide an example of a CE activity syllabus/outline that was/will be given to participants	

Section 4: Evaluation Standards (Standards 9 & 10)		
	Standard 9–Learning assessment	
	For Full accreditation: Description of how participants are assessed in terms of learning objectives; and samples of learning assessment instruments completed by participants.	
Section 4: Evaluation Standards (Standards 9 & 10)	For Probationary accreditation: Description of how participants will be assessed in terms of learning objectives; and an example of learning assessment to be completed by participants	
Section 4: Evaluation Standards (Standards 9 & 10)	Standard 10–Evaluation of activities	
	For Full accreditation: Description of how CE Provider or Presenter will encourage participants to complete the evaluation form; and sample of a previous evaluation form	
	For Probationary accreditation: Description of how CE Provider or Presenter will encourage participants to complete the evaluation form; and example of a planned evaluation form	

Affidavit of Adherence

Initial each statement to indicate agreement to adhere to NANCEAC policies. Non-agreement to adhere to these policies may result in the denial of your application.

1. The CE Program Director listed below has the authority to enforce adherence to NANCEAC standards. _____ (initial here)
2. The CE Program Director listed below must be an active participant in the planning, implementation, and evaluation of each CE activity. _____ (initial here)
3. The CE Provider must disclose to NANCEAC and to participants of CE activities all fiduciary relationships. _____ (initial here)
4. Any products mentioned in CE activities must be objectively selected and presented, with favorable and unfavorable information and balanced discussion of prevailing information on the product(s) and/or alternative treatments. _____ (initial here)
5. The CE Provider will offer credit hours only for activities that address an educational need in the delivery of naturopathic medicine. Practice-building activities or other business-related activities are not eligible for credit hours. _____ (initial here)
6. The CE Provider must not give credit hours to participants for breaks taken during the activity. Credit hours will only be given for actual presentation-time rounded to the nearest 15-minute increment. _____ (initial here)
7. The CE Provider must not give credit hours to participants for presentations involving proprietary services and/or products. _____ (initial here)
8. The CE Provider has sufficient resources to comply with the standards. If yes, _____ (initial here)
If no, provide explanation.

I hereby certify that this application is accurate to the best of my knowledge, and I agree to abide by the policies initialed above. Additionally, I agree to inform NANCEAC of any changes that affect the ability to adhere to NANCEAC Standards and policies.

Name of CE Program Director _____

Signature of CE Program Director _____ Date _____

Fiduciary Disclosure Worksheet

NANCEAC does not allow the promotion of commercial interests in the development or execution of CE activities. Commercial entities can become NANCEAC-accredited CE Providers if they adhere to NANCEAC Standards and policies.

A commercial entity is defined as any organization that produces, markets, resells, or distributes health care goods that are consumed by patients, or services used in patient care. Providers of direct clinical services are not considered commercial entities.

This worksheet consists of two sections:

- Evaluation of the CE Provider as commercial entity; and
- Evaluation of any business enterprises associated with the CE Provider as commercial entities.

Evaluation of the CE Provider:

Based on the definition above, is your organization considered a commercial entity?

- No** – We are not a commercial entity
- Yes** – We are a commercial entity
- Uncertain

Please provide the rationale for your response above in a separate document labeled “Addendum 3 -1” and attach it to the application.

Evaluation of associated business enterprises:

Based on the definition above, is your parent company or larger organization considered a commercial entity?

- No** – Our parent company or larger organization is not a commercial entity
- Yes** – Our parent company or larger organization is a commercial entity
- Uncertain
- Not applicable

Please list and describe any other business enterprises (e.g. parent or higher organizations) that either directly or indirectly participate in the development or provision of CE activities: Include the name of company/organization, and the purpose of the business in a separate document labeled “Addendum 3 -2” and attach it to the application.

CE Activity Development Requirements

During the term of accreditation, the CE Provider must submit the required NANCEAC-reporting forms in a timely manner, and accurately and fully report the information requested. One of those required forms is the *CE Activity Development Worksheet*.

The *CE Activity Development Worksheet* will assist in planning and developing the proposed CE activity to ensure NANCEAC Standards are met. Completion of all sections of the worksheet is required. **You must submit the worksheet no less than three (3) months before the CE activity.** NANCEAC staff will be available to help you complete the worksheet.

The *CE Activity Development Worksheet* is available on the FNMRA website (www.fnmra.org/NANCEAC).

The *CE Activity Development Worksheet* requires the following:

Section 1 of 8: CE Activity Description

- Title of CE Activity
- Number of proposed CE credit hours* to be awarded to participants.
* See Addendum 6 “*Calculating CE Credit Hours*” for additional information

Section 2 of 8: Administrative and Presenter Information

- CE Program Director name, degree, title, phone and email
- Presenter (if different from the Program Director) name, degree, title, phone and email
- Administrative support staff contact information.

Section 3 of 8: Planning

- Identify who developed the learning objectives.
- Indicate the criteria used in presenter selection.
- Indicate if any employees of a commercial entity involved with the identification of presenters and/or learning objectives.

Section 4 of 8: Educational Needs Assessment and Learning Objectives

- Identify educational need.
 - Knowledge: philosophy, research, biomedical sciences, public health
 - Competence: evidence-informed clinical practice, public health
 - Performance: clinical skills, hands-on therapeutics
- Organize the educational needs into a prioritized list.
- Clarify desired results.
- Determine learning objectives.
- Provide the needs assessment data and sources.

Section 5 of 8: Methods and Materials

- Indicate the educational method(s) that will be used to achieve the stated learning objectives.
 - Didactic lecture
 - Case presentations
 - Simulations
- Include a copy of the syllabus or outline.

Section 6 of 8: Learning Assessment and Evaluation

- Identify learning assessment tools.
- Determine appropriate CE activity evaluation questions.
- Indicate how changes in knowledge, competence, or performance will be measured.
 - Evaluation forms
 - Surveys
 - Customized pre/post tests
 - Demonstration of hands-on skill
- Include a copy of the evaluation form.

Section 7 of 8: Fiduciary Relationships and Commercial bias

- Indicate if the activity will receive commercial support from a commercial entity.
- A complete *Financial Disclosure and Attestation Form* for every individual involved in the development or execution of the CE activity.
- Preliminary budget

Section 8 of 8: Additional Information

Required Attachments for the CE Activity Development Worksheet

The following attachments must be included with the submission of this worksheet:

1. **Presenter's CV**
2. **Needs assessment supporting documentation** (e.g., if you checked "Survey of Target Audience" in the "Needs Assessment Data and Sources" table, you must provide the survey results)
3. **Syllabus or outline** with times, topics, and specific type and number of CE credit hours awarded.
4. **Evaluation form** that will be given to participants.
5. **All completed NANCEAC Financial Disclosure and Attestation Forms.**
6. **Budget** detailing projected income and expenses

Post-Activity Requirements

During the term of accreditation, the CE Provider must submit the required NANCEAC-reporting forms in a timely manner, and accurately and fully report the information requested. One of those forms is the *Post-Activity Report*.

The *Post-Activity Report* will supply all information necessary to record the CE activity to maintain NANCEAC accreditation. Completion of all sections of the report is required. **You must submit the *Post-Activity Report* no more than thirty (30) days after the activity.** NANCEAC staff will be available to help you complete the worksheet.

The *Post-Activity Report* is available on the FNMRA website (www.fnmra.org/NANCEAC).

The *Post-Activity Report* requires the following:

Section 1 of 6: CE Activity Description

- Title of CE Activity
- Number of CE credit hours awarded to participants.

Section 2 of 6: Administrative and Presenter Information

- CE Program Director name, degree, title, phone and email
- Presenter (if different from the Program Director) name, degree, title, phone and email
- Administrative support staff contact information.

Section 3 of 6: Number of Participants

- Total number of participants who attended.
- Number of participants by type of health care provider.
- Include completed sign-in sheets or credit attestation forms for each day.
- Include a sample of the certificate of attendance that was awarded.

Section 4 of 6: Methods and Materials

- Indicate the educational method(s) used to achieve the stated learning objectives:
 - Didactic lecture
 - Case presentations
 - Simulations
- Include 3 copies of the brochure, enduring materials, marketing materials.
- Include 1 copy of the syllabus/meeting folder.
- Include a copy of all materials that will be given to participants in the future:
 - Newsletters
 - Follow-up emails
 - New information

Section 5 of 6: Learning Assessment and Evaluation

- Indicate how changes in participant knowledge, competence, or performance were measured.
 - Evaluation forms
 - Surveys
 - Customized pre/post tests
 - Demonstration of hands-on skill
- Provide summary data of the evaluation results for all participants.
- Provide summary data of the evaluation results, by type of health care provider.

Section 6 of 6: Fiduciary Relationships

- Final budget report, listing all income and expenses.
- List of the commercial support grant(s), including amount(s) and date(s) received.

We strongly encourage you to use the budget template provided by NANCEAC. If you have your own template, please ensure that income and expenses are listed in detail as requested in the NANCEAC budget template.

Required Documents to Attach to Post-Activity Report

The following attachments must be included with this report:

- 1. Copies of completed sign-in sheets or credit attestation forms for each day**
- 2. Copies of materials given to participants:**
 - Include a copy of the brochure, enduring materials, and marketing materials.
 - Include a copy of the syllabus/meeting folder.
 - Include a copy of all materials that will be given to participants in the future (e.g., newsletters, follow-up emails, new information etc.).
 - Include sample of the certificate of attendance that was awarded
- 3. Evaluation summary by types of healthcare professionals**
- 4. Final budget report**
- 5. List of the commercial support grant(s)**

Calculating CE credit hours

A CE credit hour is defined as one contact hour (60 minutes) of an accredited continuing education activity.

- 1) A minimum of one credit hour (60 minutes) is required for the CE activity to be accredited.
- 2) In calculating the number of credit hours:
 - a) Include the number of hours of the in-person program plus the estimated time it takes the participant to complete the learning assessment.
 - b) Deduct break time of greater than 15 minutes from the number of credit hours for the program.

DRAFT