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**ILLINOIS ASSOCIATION OF SCHOOL NURSES**

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| **APPROVED PROVIDER CNE ACTIVITY PLANNING GUIDE** |

Criterion 1-10, with corresponding requirements below, refers to procedures relative to the planning and implementation of specific activities. Approved Providers must demonstrate adherence to the following criteria requested in narrative and/or checklist format. ***All criteria listed below must be documented for each activity provided within the Approved Provider Unit.***This Approved Provider CNE Activity Planning Guide (or an equivalent form/narrative that includes all elements below) is required to be completed for each educational activity to meet the recordkeeping requirements for each activity provided.

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| **Activity Title**:  |
| **Individual Session Title (if different)**:  |
| **Activity Date(s)**:  |
| **Location(s) of Activity**:  |
| **Contact Hours**:  |  |
| **Other credits issued**: | [ ]  CME [ ]  Pharmacy [ ]  Social Work [ ]  PT [ ]  OT [ ]  RT [ ]  Mental Health[ ]  Other:   |
| **Provider Approval #:** |  | **Activity #**: *(if applicable)* |  |
| **Activity Type:** *(please select one)* | [ ]  Live [ ]  Enduring [ ]  Blended |
| **If enduring activity, date content was/or needs to be reviewed**: | mm/dd/yy |
| **Activity Format**: [ ]  Conference/Symposium [ ]  Podcast [ ]  CD/DVD [ ]  Journal/Article[ ]  Webinar/Webcast [ ]  Satellite Symposium [ ]  Audioconference [ ]  Case Study[ ]  Meeting Series/Journal Club [ ]  Computer based [ ]  Other:  |
| **Will this activity be repeated?** [ ]  Yes [ ]  No [ ]  Unknown  |
| **Nurse Planner:**  |
| **If System Provider, identify organization within the system providing the activity:** |
| **This planning document was completed by: Name, Credentials on Date** |

**Educational Design Criteria**

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| 1. **Jointly Provided Activities**
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| **Jointly provided?** [ ]  Yes [ ]  No |
| **If yes, provide Organization(s) Name(s):** |  |
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| **If yes, joint-provider agreement attached** [ ]  Yes [ ]  No |
| *The joint provider agreement must be signed by representatives legally authorized to enter into contracts on behalf of each organization involved in the activity and must identify the responsibilities of each organization.* |

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| 1. **Effective Design Principles**
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Continuing education activities are developed in response to, and with consideration for, the unique educational needs of the target audience. At a minimum for CNE the target audience must include Registered Nurses. The educational design process incorporates identified gap(s), measurable outcomes, best available evidence, and appropriate learner engagement strategies.

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| **Professional Practice Gap(s) –** *Identify the gap(s) (difference between current state and desired state) in knowledge, skills or practice revealed by the needs assessment, which the activity addressed (e.g. change in practice, problem in practice, opportunity for improvement).* |
| [ ]  **Completed Gap Analysis Worksheet Attached** |
| [ ]  **Gap(s) Identified/Described –** *at least* ***one*** *gap must be identified* |
| [ ]  **Gap(s) in Knowledge (does not know):**       |
| [ ]  **Gap(s) in Skills (does not know how):**       |
| [ ]  **Gap(s) in Practice (does not show/do in practice):**       |
| **Evidence to Validate Professional Practice Gap(s) –** *Check all that apply* |
| [ ]  Written needs assessment or survey of stakeholders, target audience members, subject matter experts[ ]  Individual input from stakeholders such as learners, managers, or subject matter experts[ ]  Requested by nursing management, based on internal quality measures or identified need[ ]  Quality studies/performance improvement activities[ ]  Evaluation data from previous educational activities[ ]  Trends in literature, law and/or healthcare[ ]  Trends in practice, treatment modalities, and/or technology[ ]  Other – (Describe):       |
| **Sources of Supporting Evidence –** *Check all that apply* |
| [ ]  Annual needs assessment or survey[ ]  Literature review[ ]  Requests (phone, in-person, email)[ ]  Activity evaluation summary requests[ ]  Surveys from stakeholders or learners | [ ]  Outcome/Quality data (i.e. Regulatory)[ ]  Research findings[ ]  Content expert[ ]  Other – (Describe):       |
| **Supporting Evidence is Located:** [ ]  On file [ ]  Attached [ ]  Other – (Describe):       |
| **Brief Executive Summary of Data Validating the Need for the Activity:**      |
| **Target Audience –** *Check all that apply* |
| [ ]  Registered Nurses – RNs [ ]  Advanced Practice Registered Nurses – APRNs[ ]  Registered Nurses in a Specialty Area – (Identify specialty):      [ ]  Inter-professional e.g., Physicians, Pharmacists, Social Workers – (Describe):      [ ]  Other – (Describe):       |
| **Desired Learning Outcome(s) –** Outcomes are evaluated to determine the impact of educational activities on patient care and professional development of the learner.  |
| **Learning Outcome(s) listed on Educational Planning Form:** [ ]  Yes  |
| **Outcomes used to evaluate educational activity’s impact on:**[ ]  Nursing Professional Development[ ]  Patient Outcome[ ]  Other – (Describe):       |
| **Educational Planning Form(s)** *– learner outcomes, related content outline and learner engagement strategies for each session/presentation during this educational activity. Note: Use of the Educational Planning Form is required*[ ]  **Completed Form(s) Attached**  |
| **Learner Engagement Strategies –** Strategies utilized during the educational activity to engage learners |
| **Learner Engagement Strategies listed on Educational Planning Form:** [ ]  Yes  |

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| 1. **Qualified Planners**
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Planning for each educational activity must include one Nurse Planner and one other planner. One of the planners must have appropriate subject matter expertise for the educational activity (*this individual is identified as the content expert*). List the names and credentials of the Nurse Planner(s) and all other persons involved in planning the educational activity.

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| **Nurse Planner(s) Name and Credentials** | **Disclosure/ COI Form Attached?** | **Was COI found?** | **Bio form** |
|  | [ ]  Yes [ ]  No | [ ]  Yes [ ]  No | [ ]  Attached [ ]  On file |

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| **Is the Nurse Planner also the Content Expert?** | [ ]  Yes [ ]  No |

 ***If no*, please provide the name of the individual who served as the Content Expert below:**

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| **Content Expert(s) Name and Credentials** | **Disclosure/ COI Form Attached?** | **Was COI found?** |
|  | [ ]  Yes [ ]  No | [ ]  Yes [ ]  No |

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| **How were qualifications verified?** | [ ]  Review of resume/CV/bio [ ]  Certification in content area[ ]  Current position/title/certification [ ]  Other – (Describe):        |
| **Qualifications of Content Expert verified by:** | **Name, Credentials on Date** |

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| **Planning Committee Member(s) Name and Credentials:** | **Disclosure/COI Form Attached?** | **Was COI found?** |
|  | [ ]  Yes [ ]  No | [ ]  Yes [ ]  No |
|  | [ ]  Yes [ ]  No | [ ]  Yes [ ]  No |
|  | [ ]  Yes [ ]  No | [ ]  Yes [ ]  No |
|  | [ ]  Yes [ ]  No | [ ]  Yes [ ]  No |

*REMINDER: Strategies utilized by the Nurse Planner to resolve COI must be documented on the individual’s Conflict of Interest Form.*

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| 1. **Qualified Faculty**
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List the names and titles of the activity presenters/faculty/ speakers/authors, and/or content reviewers who participated in the planning of the educational activity.

| **Name and Credentials of Presenter(s)/Faculty/ Speaker(s)/Author(s):** | **Disclosure/ COI Form Attached?** | **Was COI found?** | **How did the planning committee assure the qualifications of this individual are appropriate and adequate? (*Check all that apply*)** |
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|  | [ ]  Yes [ ]  No | [ ]  Yes [ ]  No | [ ]  Review of resume/CV[ ]  Current position/title/ certification[ ]  Recommendation by colleagues[ ]  Review of literature written by faculty[ ]  Observation of previous presentation[ ]  Other:       |
|  | [ ]  Yes [ ]  No | [ ]  Yes [ ]  No | [ ]  Review of resume/CV[ ]  Current position/title/ certification[ ]  Recommendation by colleagues[ ]  Review of literature written by faculty[ ]  Observation of previous presentation[ ]  Other:       |
|  | [ ]  Yes [ ]  No | [ ]  Yes [ ]  No | [ ]  Review of resume/CV[ ]  Current position/title/ certification[ ]  Recommendation by colleagues[ ]  Review of literature written by faculty[ ]  Observation of previous presentation[ ]  Other:       |
|  | [ ]  Yes [ ]  No | [ ]  Yes [ ]  No | [ ]  Review of resume/CV[ ]  Current position/title/ certification[ ]  Recommendation by colleagues[ ]  Review of literature written by faculty[ ]  Observation of previous presentation[ ]  Other:       |

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| The Approved Provider Unit must take precautions to prevent bias and ensure content integrity during the educational activity, whether or not commercial support was received or exhibits were present.  |
| **The following precautions taken to prevent bias in the educational content:** *(Check all that apply)*[ ]  Each Faculty/Presenter/Author has agreed that s/he will present information fairly and without bias.[ ]  The potential for bias was discussed/reviewed with each presenter (*trade names, relationships with commercial entities and any commercial support received, etc*.).[ ]  In conjunction with the above, the session will be monitored for potential violation(s) and any violations will be addressed. [ ]  Other (Describe):      |

| **Name and Credentials of Content Reviewer(s):** *(if applicable)* | **Disclosure/COI Form Attached?** | **Was COI found?** |  |
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|  | [ ]  Yes [ ]  No | [ ]  Yes [ ]  No | [ ]  Review of resume/CV[ ]  Recommendation by colleagues[ ]  Current position/ title/certification[ ]  Certification in content area[ ]  Other:       |
|  | [ ]  Yes [ ]  No | [ ]  Yes [ ]  No | [ ]  Review of resume/CV[ ]  Recommendation by colleagues[ ]  Current position/ title/certification[ ]  Certification in content area[ ]  Other:       |

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| 1. **Contact Hour Calculation**
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Contact hours are determined in a logical and defensible manner, and awarded to participants for those portions of the educational activity devoted to learning and evaluation. One contact hour = 60 minutes. Activities must be a minimum of 30 minutes. After the first contact hour, fractions or portions of the 60-minute hour should be calculated e.g. 150 minutes of learning experience equals 2.5 contact hours. Contact hours can be awarded in the hundredths (i.e., two digits past the decimal point) or you may round down. Do not round up. Time allowed for registration, introductions, announcements, breaks, meals, business meetings and viewing of exhibits should be excluded from the calculation of contact hours.

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| **Full Agenda/Schedule for the Educational Activity**[ ]  **Copy of Full Agenda Attached** *– from registration to closing, including breaks* |
| **Method Used to Calculate Contact Hours** |
| [ ]  Total number of eligible minutes for the entire activity/event divided by 60[ ]  Total number of eligible minutes for each session attended, divided by 60[ ]  Pilot study – average time for completion of activity by testers[ ]  Historical data – compared this activity to a similar existing enduring material activity[ ]  Professional opinion based on complexity of content and delivery method[ ]  Other (Describe):      |
| **Successful Completion Requirements –** *Check all that apply* |
| [ ]  Attendance at entire activity – *as determined by planning committee’s selected methodology or Board of Nursing requirement*[ ]  Attendance at 1 or more sessions[ ]  Participation in key interview(s)[ ]  Participation in case study analysis[ ]  Return skill demonstration[ ]  Submission of required assignment(s)[ ]  Other – (Describe):       | [ ]  Completion/submission of evaluation form[ ]  Completion of self-study packet[ ]  Achieving passing score on posttest – *attach a copy of the post-test & indicate scoring methodology*[ ]  Small group work/exercises[ ]  Observation of practice implementation[ ]  Participation in audience response system |

*REMINDER: Successful completion requirements must be shared with learners prior to the start of the learning activity, e.g. brochure, announcement, flyer, email, website, etc. Ensure that the method of communicating this with learners is documented.*

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| **How was attendance verified?** |
| [ ]  Pre-registration with check-in at event[ ]  Sign-in sheet/scanning system at event[ ]  Self-reported attendance | [ ]  Log-in or electronic verification[ ]  Collection of participation via computer log[ ]  Other – (Describe):       |

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| 1. **Certificate of Completion**
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Participants receive written verification of their successful completion of an activity that contains the following: (a) participant name, (b) title and date of activity, (c) name and address of Approved Provider, (d) number of contact hours awarded/received, (e) Midwest MSD Provider Approval number, and (f) the official Midwest MSD Provider Approval statement.

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| **Certificate of Completion Attached** [ ]  Yes  |
| **Process for issuing certificates to participants:**[ ]  Receipt of evaluation form at the end of the activity/or thereafter[ ]  Copy of document listing sessions attended/contact hours awarded collected at the event[ ]  Individual certificates generated after the activity based on evaluation/sessions attended or completion of post-test[ ]  Certificates generated by online evaluation program[ ]  Other – (Describe):       |
| **Unique Identifier for Participants in this Event/Activity:** |
| [ ]  Email Address [ ]  Professional License number [ ]  Home Address [ ]  Birthdate (MM/DD) [ ]  Employer ID number [ ]  Phone Number [ ]  Auto-generated number provided to participant [ ]  Other – (Describe):       |

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| 1. **Activity Evaluation**
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A clearly defined method that includes learner input is used to evaluate the effectiveness of each educational activity. Results from the activity evaluation are used to guide future activities. The evaluation components and method of evaluation should be relative to the desired learning outcome of the educational activity.

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| **Method(s) of Evaluation Used –** *Check all that apply**Short Term Methods:*[ ]  Evaluation form [ ]  Self-reported intent to change practice[ ]  Pre- and/or Post-test [ ]  Return skill demonstration [ ]  Other – (Describe):      *Long Term Methods:*[ ]  Self-reported change in practice [ ]  Data collection related to change in quality outcome measures [ ]  Observation of performance [ ]  Return on investment (ROI) [ ]  Other – (Describe):       |
| **Evaluation Online** [ ]  No [ ]  Yes – URL/Website/Intranet:      ; Log-in:      ;  |
| **Evaluation Summary Attached** [ ]  Yes  |
| **How will the evaluation results be used to guide the development of future activities?**[ ]  Revisions to subsequent offerings *(repeat activities)* [ ]  Shared with presenters[ ]  Provide feedback to participants [ ]  Shared with planning committee[ ]  Future planning of educational activities [ ]  Shared with administration/QI staff[ ]  Other – (Describe):       |

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| 1. **Promotional Materials**
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The official approval statement must be provided to learners prior to the start of every educational activity and on each certificate of attendance. The approval statement must be displayed clearly to the learner and be written exactly as indicated by the Midwest MSD.

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| **Method(s) used to promote the activity** *– check all that apply* |
| [ ]  Flyer/brochure[ ]  Memo/Letter[ ]  Meeting notice[ ]  Other – (Describe):       | [ ]  Email notification[ ]  Website/Intranet – *please provide screen shot or URL*[ ]  Social media/Blog – *please provide screen shot* |
| **All Types/Forms of Promotional Materials Attached** [ ]  Yes [ ]  No**Provider Approval Statement listed** *[Insert Name of Approved Provider] is an approved provider of continuing nursing education by the Midwest Multistate Division, an accredited approver by the American Nurses Credentialing Center's Commission on Accreditation*.[ ]  Yes  |
| **If no promotional materials developed, describe how the target audience was made aware of the educational activity**      |
| **Online Registration?** [ ]  Yes [ ]  No | **Event Website?** [ ]  Yes [ ]  NoURL/Website:      |

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| 1. **Commercial Support and Exhibits**
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The Approved Provider Unit must adhere to the [ANCC *Content Integrity Standards for Industry Support in Continuing Nursing Educational Activities*](http://130.94.17.6/Doc-Vault/Individual/Content-Integrity-Standards.pdf) at all times. The Approved Provider Unit must have a written policy or procedure that includes a signed, written agreement when commercial support is received. They must also take precautions to prevent bias and ensure content integrity when exhibits/vendors are present.

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| **Did this activity receive commercial support** [ ]  Yes [ ]  No |

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| **NAME OF COMMERCIAL INTEREST ORGANIZATION** | **TYPE OF SUPPORT** |
| FUNDING AMOUNT |  IN-KIND DONATION |
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| **Commercial Support Agreements Attached** *(if applicable)* [ ]  Yes [ ]  No [ ]  N/A |
| **Content Integrity will be/has been maintained by:** (*check all that apply)*[ ]  Commercial supporter(s) did not participate in the planning of this activity in any way.[ ]  The commercial support policy/procedure was discussed with those providing the support.[ ]  The commercial support policy/procedure was shared in writing with those providing the support.[ ]  Support agreement terms and conditions was discussed and clarified prior to signing[ ]  Presenters/faculty/authors were informed of and agreed not to promote the products or the company providing financial or in-kind services[ ]  Presence of commercial support and need to avoid bias was discussed with each presenter/faculty/ author[ ]  Advertising/company logos were removed from any educational content *(slides, handouts)*[ ]  Educational materials were not packaged in items bearing logos of a commercial interest[ ]  Commercial supporter(s) were not referenced during the activity except for required disclosure[ ]  In conjunction with above, the session(s) were monitored & violators of policy are not asked to present again.[ ]  Other – (Describe):        |
| **Were exhibits/vendors present at this educational activity?** [ ]  Yes [ ]  No |
| **The following strategies/precautions have been taken to prevent bias/ensure content integrity with the presence of exhibits/vendors:** *(Check all that apply)*[ ]  Exhibiting, promoting or selling products will not take place during scheduled educational time[ ]  Exhibit area will be physically separated from area where educational content will be delivered[ ]  Marketing/advertising will not be included within educational content (slides, handouts, etc.)[ ]  ‘Giveaways’ will be kept separate from educational materials/delivery[ ]  Learner contact information will not be shared without written permission from the learner[ ]  Commercial interest organizations are not allowed to influence the audience during the educational activity for any reason[ ]  Other – (Describe):       |

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| 1. **Disclosure Responsibilities**
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All required disclosures and any other applicable disclosures must be provided to learners *prior to the start* of an educational activity. Evidence of disclosures to the learner must be retained in the activity file.

For *live* activities, disclosures must be made prior to the initiation of the educational content. In *enduring* activities (print, electronic, or web-based activities), disclosures must be visible to the learner prior to the start of the educational content. Required disclosures may not occur or be located at the end of the educational activity.

*Use an ‘X’ to identify the disclosures that are applicable for this educational activity, and the place(s) where learners will receive each applicable disclosure in writing prior to the start of the educational activity.*

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| **DISCLOSURE** | **APPLICABLE?** | **WHERE IS THIS ITEM DISCLOSED?** |
| NO | **YES** | Promotional/Advertising Materials | Participant Handout/ Packet | On Screen/Disclosure Slide  | Sign at Check-In Area | Other\* (Specify) |
| Provider Approval Statement  |  | **X** |  |  |  |  |  |
| Successful Completion Requirements |  | **X** |  |  |  |  |  |
| Presence/Absence of COI for Planners and Presenters/Authors/ Content Reviewers |  | **X** |  |  |  |  |  |
| Commercial Support *(if applicable)* |  |  |  |  |  |  |  |
| Joint Providers Identified *(if applicable)* |  |  |  |  |  |  |  |
| Expiration Date for Awarding Contact Hours *(Enduring Material activities only)* |  |  |  |  |  |  |  |

\* Providers must specify method and provide written documentation.

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| **Copies of methods noted above to deliver required disclosures to learners attached** *(promotional materials, letters, program schedules, presentation materials, announcements, etc. as identified above)*[ ]  Yes [ ]  No |

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| **Required Attachments** |

[ ]  Joint-Provider agreement (if applicable)

[ ]  Gap Analysis Worksheet (if applicable)

[ ]  Sources of evidence to support the professional practice gap(s) the activity will address

[ ]  Complete Educational Planning Form(s)

[ ]  Full agenda/schedule for the educational activity – *from registration to closing, including breaks*

[ ]  Signed biographical data and conflict of Interest forms for all Nurse Planners involved in the activity

[ ]  Signed conflict of Interest forms for all members of the planning committee and presenters/authors/content reviewers involved in the activity.

[ ]  Certificate of attendance including all required elements

[ ]  Evaluation method used including a summary of evaluation data

[ ]  Commercial Support agreement (if applicable)

[ ]  Promotional materials (resources used to market the activity to the target audience)

[ ]  Required disclosure delivery mechanisms

[ ]  List of participant names and unique identifier assigned

[ ]  Record of the number of contact hours earned by each participant