Planning a Successful Diabetes Educational Conference—Can the CE Application Process be Easy, too?
Tammi Boiko
BSN, RN, CDE
Chair, California Coordinating Body
Diabetes Program Coordinator
Saddleback Memorial Medical Care
Laguna Hills, California

Jill S. Walsh
DNP, RN, CEN
Accreditation Manager
American Association of Diabetes Educators
Chicago, Illinois
Learning Objectives

• Describe the steps in planning an educational event.

• Describe the process for developing activities in adherence with accreditation criteria.

• State four tips for ensuring a smooth and efficient process when submitting an application for continuing education credits.
Education for the Educator

- Annually, National AADE develops and presents a professional conference for diabetes educators
  - AADE identifies and confirms venues at least 5 years in advance
- Annual Meeting Planning Committee is by invitation from the AADE President
  - Reviews past conference evaluations for education topics
Education for the Educator (cont.)

• Cost of attending the AADE Annual Meeting can be expensive for those who are required to pay for the conference themselves.
  – AADE Foundation does offer some scholarships to attend

• State Conferences provide networking opportunities and provide AADE approved CEs
Benefits of a State Conference

• A State Conference provides a wonderful opportunity for diabetes educators to attend a diabetes focused education program

• Reduced Costs
  – Decreased travel costs and hotel fees

• Members of Local Networking Groups (LNGs) from around the State have the opportunity to network and share success stories from community events
Timing of Conference

Considerations:

• Time of year
  – Think of quarters: Spring, Summer, Fall and Winter
• Other conferences in the area
• Holidays, and non-holidays
  – Any three day week-end
  – President’s Day week-end
• Summer vacation
  – June, July and August
• National AADE Conference
  – State Conferences should be adjunct educational programs and should not compete
Where to Start?

- Planning Committee
  - State Coordinating Body
  - Local Networking Facilitators

- Identify talents within the planning committee
  - Budgets
  - CE application
  - Grant writing
  - Working with vendors
Developing a Timeline

• Initiate a planning timeline based on the following:
  – Hotel/Venue availability
  – CE Application deadline
  – Educational Grants submission dates
• Monthly committee tasks updates
• Bi-monthly committee tasks updates
• Weekly committee tasks updates
• A well planned conference should not require ‘tasks’ during the week of the conference!
  – You may have last minutes emergencies to deal with!
Venue Location

• Hotel
  – Conference rooms, banquet rooms, vendor display area, individual dining options
  – Room accommodations, discounts

• Airports, trains
  – Cost to fly, location to hotel and venue

• Appeal of Venue
  – Rooms clean, valet, exercise room, pool/sauna

• Off-sight opportunities
  – Amusement parks, beaches, wine tasting, sporting events
Venue Contracts

- Contracts are legal and binding
- Review the ‘fine print’
  - Fees for audio/visual aids
  - Screens
  - Laptops
- Who carries the liability insurance if someone is hurt on the property?
- Rooms blocked each day
- Vendor location, additional fees?
Catering Ideas

• May not bring in any outside food or drinks

• Continental breakfast
  – Juice, coffee, fresh fruit, bagels, eggs, string cheese

• Lunch
  – Served or buffet style

• Dinner
  – No scheduled dinner
  – Provide contact information for local restaurants
Meet and Greet

- Offers a time for attendees to meet other attendees
- If a 2 day conference, schedule first day
- Allows ‘mental let-down’ after sitting all day
- Budget appetizers and beverages
- 2 drink tickets per person
  - Covers water, soda and other beverages
Conference Theme

- Theme should be fun, upbeat and encouraging
- Tie into the venue location if possible
- Pull the theme throughout the conference
2011- ‘Bridging the Gaps Between Research and Clinical’
Don’t ask yourself what the world needs; ask yourself what makes you come alive. And then, go and do that. Because what the world needs are people who have come alive”

Dr. Howard Thurman
2013- ‘Pearls of Wisdom, Practical Pearls for your Patients and Practice’
Topics of Interest

• Follow AADE Healthy 7™
  – Allows you to have all educational topics covered

• Current trends in Diabetes
  – Medications, Devices, Research

• Previous conference evaluations
  – Each year
Identifying Speakers

- Local content experts
- Super-Star your State AADE Members
  - Honorarium
  - Attend conference for free
  - Hotel fees
- Speaker fees
  - Honorarium
  - Travel expenses
    - Taxi to and from the airport, parking fees
    - Rooms and meals
Conference Agenda

- Welcome, housekeeping
- Two presentations (one hour each)
- 20 min break - morning coffee and vendors
- Two presentations
- Lunch (1.5 hours)
- Two presentations
- 20 min break - afternoon snack and vendors
- One presentation
- First night, Meet and Greet and dinner on your own
- Provide a list of local restaurants in the area so reservations can be made ahead of time
Conference Agenda

• When developing the agenda, keep in mind the CE requirements of sitting time
• CDR allows CE for attending the Vendor displays
• 7 CE’s per day is a good education day!
• 14 CE’s for the entire Conference allows time for networking
CE Application - New in 2013

• New application
• New forms
• New “Content Integrity Standards for Industry Support”
• CB’s and LNG’s can provide CPE credits for dietitians through AADE
  – No longer need to send separate application to CDR
  – Submit one application to AADE and request continuing education credits for nurses, dietitians and pharmacists
The American Association of Diabetes Educators is accredited by the 
**Accreditation Council for Pharmacy Education** as a provider of continuing pharmacy education

The American Association of Diabetes Educators is accredited as a provider of continuing nursing education by the **American Nurses Credentialing Center's Commission on Accreditation**

The American Association of Diabetes Educators is accredited as an approver of continuing nursing education by the **American Nurses Credentialing Center's Commission on Accreditation**

The American Association of Diabetes Educators is a Continuing Professional Education (CPE) Accredited Provider with the **Commission on Dietetic Registration**
Educational Design Process

- Assessment of Learners’ Needs
- Qualified Planners and Faculty/Presenters/Authors/Content Reviewers
- Effective Design Principles
- Awarding Contact Hours
- Evaluation
- Accreditation/Approval Statement
Educational Design Process

- Documentation of Completion
- Commercial Support and Sponsorship
- Conflicts of Interest Evaluation and Resolution
- Disclosures Provided to Participants
- Recordkeeping
Assessment of Learners’ Needs

• Identify target audience

• Needs assessment method
  – Survey stakeholders, target audience, SMEs; review quality studies/PI activities: opportunities for improvement; review evaluations from previous educational activities; **review trends in literature, law and healthcare**

• Supporting evidence of needs assessment data
  – Annual employee survey data, literature review, outcome data, survey results from stakeholders, quality data, requests, written evaluation summary data
Qualifications

Qualified Planners and Faculty/Presenters/Authors/Content Reviewers

- Planning Committee
  - Must have a minimum of one Nurse Planner (if seeking CNE) and one other planner
  - Nurse Planner must have a BSN
  - Biographical Data/Conflict of Interest

- Faculty/Presenters/Authors/Content Reviewers
  - Biographical Data/Conflict of Interest
  - Describe expertise relative to the content in the presentation – not “CV attached”
Conflict of Interest

• **Conflict of Interest**
  The potential for conflicts of interest exists when an individual has the ability to control or influence the content of an educational activity and has a financial relationship with a *commercial interest,* the products or services of which are pertinent to the content of the educational activity

• **Commercial interest,** as defined by ANCC, is any entity producing, marketing, reselling, or distributing healthcare goods or services consumed by or used on patients, or an entity that is owned or controlled by an entity that produces, markets, resells, or distributes healthcare goods or services consumed by or used on patients.
Resolution of Conflict of Interest

Definition
• Relationships with commercial interest organizations
• Include spouse/significant other
• Past 12 months

Evaluation
• No relationship
• Relationship present, not relevant to content, no resolution required
• Relationship present, relevant to content, resolution required

Resolution and Assessment
• Remove individual with relationship
• Revise role for individual with relationship
• Don’t award contact hours
• Review content for bias before activity and monitor activity
• Review content for bias before activity and evaluate participant feedback
Educational Design Principles

• Purpose: (write as an outcome statement, e.g. "The purpose of this activity is to enable the learner to…..”

• Identified gaps – validates the need for activity
Purpose: (write as an outcome statement, e.g. "The purpose of this activity is to enable the learner to.....")

The purpose of this activity is to enable the learner to become more knowledgeable about advanced insulin pump features to better meet the challenges of daily diabetes management.
Identified Gap

Identify appropriate gap for the intended target audience – What is the need for this educational activity?

Identified Gap(s): 
Description of current state: 
Description of desired/achievable state: 
Gap to be addressed by this activity: 
___ Knowledge (knows)
___ Skills (knows how)
___ Practice (shows/does)
Identified Gap

Miller’s Model of Clinical Competence

Knows: learner has knowledge about the topic/subject
Knows how: learner is capable of applying the knowledge
Shows how/does: learner is able to apply knowledge and skills in a simulated setting (shows how) or the practice environment (does)
Identified Gap - Example

**Title of Activity:** Advanced Insulin Pump Management

**Identified Gap(s):** Insulin pumps are becoming more common for treatment of type 1 diabetes as an alternative to multiple daily injections. Diabetes educators need advanced knowledge about insulin pump management.
Description of current state: Diabetes educators are responsible for providing diabetes self-management education including topics relevant to insulin pump use.
Identified Gap - Example

Description of desired/achievable state: Diabetes educators will have increased knowledge about advanced insulin pump features to better meet the challenges of daily diabetes management
Identified Gap - Example

Gap to be addressed by this activity:

X Knowledge (knows)
___ Skills (knows how)
___ Practice (shows/does)
<table>
<thead>
<tr>
<th>Desired state</th>
<th>Current state</th>
<th>Identified gap</th>
<th>Gap due to knowledge, skills or practices</th>
<th>Purpose</th>
<th>Outcome Measure</th>
</tr>
</thead>
<tbody>
<tr>
<td>Registered nurse compliance with the Virginia Nurse Practice Act 2012</td>
<td>Registered nurse compliance with the Virginia Nurse Practice Act 2010</td>
<td>Registered nurses may be out of compliance with new 2012 requirements if unaware of new requirements</td>
<td>Lack of knowledge related to new requirements in Virginia Nurse Practice Act 2012</td>
<td>Registered nurses will comply with requirements in the Virginia Nurse Practice Act 2012</td>
<td>Registered nurses will successfully pass post-test related to new requirements in Virginia Nurse Practice Act 2012 with score of 80% or higher</td>
</tr>
</tbody>
</table>

Educational Design Principles

• Measurable educational objectives –
  – List learner-oriented outcomes that may be expected as a result of participating in the educational activity

Bloom’s Taxonomy
(Revised)


Based on an APA adaptation of Anderson, L.W. & Krathwohl, D.R. (Eds.) (2001)
## Behavioral Objectives

<table>
<thead>
<tr>
<th>Basic Knowledge</th>
<th>Intermediate Comprehension</th>
<th>Advanced Application</th>
</tr>
</thead>
<tbody>
<tr>
<td>Define</td>
<td>Discuss</td>
<td>Apply</td>
</tr>
<tr>
<td>Repeat</td>
<td>Describe</td>
<td>Use</td>
</tr>
<tr>
<td>Record</td>
<td>Identify</td>
<td>Demonstrate</td>
</tr>
<tr>
<td>List</td>
<td>Recognize</td>
<td>Show</td>
</tr>
<tr>
<td>Describe</td>
<td>Explain</td>
<td>Interpret</td>
</tr>
<tr>
<td>State</td>
<td>Restate</td>
<td></td>
</tr>
</tbody>
</table>
Educational Design Principles

Teaching-Learning Strategies

• Identify methods, strategies and materials
  • Lecture/PowerPoint slides
  • Discussion
  • Case Studies
  • Demonstration
  • Q & A

• Develop ways to provide learner feedback
• Define successful completion
• Determine how participation will be verified
Educational Design Principles

- Content must be evidence–based or based on the best available evidence
  - Cite from peer-reviewed journals
  - Clinical guidelines (e.g., www.guidelines.gov)
  - Expert resource
  - Organization websites
  - Textbook reference

- List the web page or reference
Awarding Contact Hours

• One contact hour = 60 minutes
• Contact hours may not be awarded retroactively except in the case of a pilot study
• Minimum time for educational activities in order to award contact hours
  • ANCC – nursing – 0.25 hours
  • ACPE – pharmacy – 0.25 hours
  • CDR - dietitians – 1 hour
Activity Evaluation

Learner input is used to evaluate the effectiveness of each educational activity.

• Examples of short –term methods:
  – Evaluation form with questions related to individual activity objectives
  – Active participation in learning activity
  – Post-test
  – Return demonstration
  – Case study analysis
  – Role-play
Accreditation Statements

• All communications, marketing materials, certificates and documents that refer to the approver/provider’s accredited status contain the official accreditation statements for ANCC, CDR, ACPE (as applicable to the audience)
Documentation of Completion

Certificate must include:

- Title and date of the educational activity
- Name and address of the provider of the educational activity (Web address acceptable)
- Number of contact hours awarded
- Accreditation/approval statement
  - The accreditation/approval statement must be provided to learners prior to the start of every educational activity and on each certificate of completion.
- Participant name
Commercial Support and Sponsorship

What type of organization is providing support (where does the support come from)?

- **Commercial support**: financial or in-kind contribution given by a commercial interest that is used to pay for all or part of an educational activity

- **Sponsorship**: financial or in-kind contribution given by a non-commercial interest organization that is used to pay for all or part of an educational activity

Must have a signed and dated agreement
Content Integrity

Content integrity of the educational activity

• Actual or potential conflicts of interest resolved (individuals in a position to control/influence content of the activity)
• Content is based on best available evidence
• Independence from any organization providing funding for the activity (commercial interest organization or sponsor)
• Free from promotional activity
• Content is fair, balanced and there is no commercial bias
Disclosures

Required:

• Requirements for successful completion including purpose or objectives AND criteria used to determine successful completion (Stay for entire activity? Evaluation form completed? Claim credit commensurate with participation?)

• Presence or absence of conflicts of interest

If applicable:

• Commercial support / sponsorship

• Requirement for “non-endorsement disclosure” statement has been eliminated
Disclose Commercial Support

• Keep education separate from promotional activities and disclose all commercial support of educational activities.

• Commercial support must not influence the planning, development, content, implementation or evaluation of education.

• If you are receiving commercial support, you must submit a Written Agreement for Commercial Support.
Post Activity Documentation Requirements

To be submitted to AADE no later than 30 business days after the educational activity

- Copy of brochure used for marketing
- Final copies of handouts
- Attendance Rosters (all sign-in sheets)
- Summary of participant evaluations
Recordkeeping

Activity program coordinator is responsible for assuring that the file records are maintained in a retrievable file (electronic or hard copy) that is accessible to authorized personnel for 7 years.
Submitting the Application

• Submit at least 45 BUSINESS days prior to date of educational activity
  – AADE uses a pool of member volunteer reviewers

• Submit completed application and forms
  – Incomplete applications will be returned to reduce the “back and forth” between AADE national office and the activity coordinator
Application Review Process

Each application is reviewed by members of the Continuing Education Approval Unit – an inter-professional peer reviewer group. The qualitative review process ensures that the application is:

• Accurate
• Meets Accreditation criteria (ANCC, CDR, ACPE)
• Relevant to professional practice
• Meets the learning level of the target audience
Volunteer Reviewers

AADE Volunteer Reviewer opportunities available for 2014

Log into “My AADE Network” and go to the Volunteer section
https://www.diabeteseeducator.org/Members/GetInvolved.html
Lessons Learned

- Vegetarian meals
- Not enough rooms block
- Round tables vs. lecture style seating
- Two screens
- Water on each table
- Coffee and tea offered throughout the day
- Language barriers