



**UNC Eshelman School of
Pharmacy
Office of Lifelong Learning
Speaker Packet**



Event Title

Speaker Name

Credentials

Please read, complete, sign, & return the required items by the due date listed below.

	Required	Not Required	Items	Due Date
1			UNC ESOP OLL Speaker Agreement (In this packet)	
2			Disclosure of Relevant Relationships (In this packet)	
3			Completed Active Learning Plan and Gap Analysis (In this packet)	
4			CV/Resume	
5			Short Bio (for introduction purposes)	
6			W9 and Independent Contractor Checklist	
7			Agenda	
8			Presentation Materials (PowerPoint(s)/Handouts)	
9			ACPE/Dental presentation requirements needed All pharmacy/dental presentations should include title (slide #1), disclosure (slide #2), objectives (slide #3) and assessment questions throughout presentation.	

Please mail, email, or fax completed items to:

Mailing Address: UNC ESOP Office
of Lifelong Learning
Attn:
CB #7574
301 Pharmacy Lane Chapel Hill,
NC 27599

Contact Information:

Name:
Phone:
Fax:
Email:



UNC ESOP Office of Lifelong Learning Speaker Agreement

Please submit this completed agreement at least 30 days prior to program date

This agreement made between _____ (Speaker Name) (hereinafter referred to as Speaker), of _____ (company) and the **UNC Eshelman School of Pharmacy Office of Lifelong Learning** (hereinafter referred to as UNC ESOP OLL), **301 Pharmacy Lane, Chapel Hill, NC 27599** is effective _____ and will expire **1 YEAR FROM WEBINAR DATE** (date webinar accreditation ends).

SPEAKER INFORMATION

*First Name: _____ *Last Name: _____

*Degree (check): ☐ RPh ☐ PharmD ☐ PhD Other: _____

*Professional Title: _____

*Company/Pharmacy/Organization: _____

Address: _____

City: _____ State: _____ Zip Code: _____

Country: _____ Email Address: _____

Telephone Number: _____ Fax Number: _____

Cell Phone Number: _____

* Please make sure to print this information as you want it to appear on the registration page.*

PRESENTATION INFORMATION

Speaker agrees to provide the following presentation for UNC ESOP OLL in accordance with the learning objectives and course description for the program provided below. The speaker's presentation must comport with these criteria.

Session Date: _____ **Session Time (Start - Finish):** _____

Your presentation title: Please provide your session title below

Checklist for CE Presenters

The checklist below outlines information necessary for each presentation. This information complies with the Accreditation Council for Pharmacy Education (ACPE) standards. Please complete this checklist and return it, along with your introductory bio, CV, and your Conflict of Interest Disclosure at least 30 days prior to your program date

Step One: Please list your professional title, name, and credentials as you would like them listed on the program registration page:

Step Two: Which activity type do you plan to present?

☐ **Knowledge-Based (at least 15 minutes)**
(recall of facts/acquire factual knowledge)

Knowledge-based can be summed up by the following:

- Require a single thought step to answer correctly
- The answer is often directly in program materials
- Good test takers often can answer without knowing content area

If knowledge-based, please check off the learning assessment component(s) you plan to use*:

- ☐ Quizzes
- ☐ Group Discussion
- ☐ Fill-in activities
- ☐ Questions
- ☐ Other:

☐ **Application-Based (at least 1 hour)**
(apply information learned in time frame allotted)

Application-based can be summed up by the following:

- Require multiple thought steps to answer correctly, each of which must be correct to get to final correct answer
- More difficult for good test takers to get correct answer without knowing content area

If Application-based, please check off the learning assessment component(s) you plan to use*:

- ☐ Case Studies
- ☐ Vignettes
- ☐ Observations
- ☐ Hands on workshop
- ☐ Simulations
- ☐ Paired practice (role playing)
- ☐ Other:

UNC ESOP OLL will utilize informal audience response as well.
Please reserve a brief question and answer session at the end of your session.

Step Three: Identify your target audience. NOTE: Program objectives must be applicable to that specific profession and may require separate objectives for each. (check all that apply):

☐ Pharmacists

☐ Pharmacy Technicians

Step Four: Please list 3-4 learning objectives for each session, and identify which profession they apply to. Learning objectives must be consistent with the above activity type. Describe what the pharmacists/technicians can expect to know or be able to do after completion of the CPE activity. Objectives should suggest outcome measures for an activity's success or effectiveness. Please use the CPE guide (Pages 11-13) to help identify appropriate verbs based on the activity type.

1. _____

2. _____

3. _____

4. _____

Step Five: Which of these eight topic areas do you expect your presentation will address? (check all that apply):

☐ Disease State Management/Drug Therapy

☐ Patient Safety

☐ AIDS Therapy

☐ Immunizations

☐ Law Related to Pharmacy Practice

☐ Compounding

☐ General Pharmacy

☐ Pain Management

Step Six: Please provide a session description of how your presentation intends to create changes in behavior that will lead to better business practices or patient care for pharmacists and/or technicians:

Step Seven: Please include questions with possible answers to be used during your presentation and what objective it helps to meet. Use word doc if needed.

Answer Objective#
Letter

1.

2.

3.

POLICY OF NON-COMMERIALISM

UNC ESOP OLL maintains a policy of non-commercialism in collaboration and is accredited in accordance with the Accreditation Council for Pharmacy Education, which states “**continuing pharmacy education programs should provide for an in-depth presentation with fair and full disclosure and equitable balance**. Appropriate topics and learning activities shall be distinguished from those topics and learning activities which are promotional or appear to be intended for the purpose of endorsing either a specific commercial drug or other commercial product (as contrasted with the generic product/drug entity and its contents or the general therapeutic area that it addresses), or a specific commercial service (as contrasted with the general service area and/or the aspects or problems of professional practice that it addresses).”

PRESENTATION MATERIALS

Speaker agrees to provide UNC ESOP OLL with **one (1) presentation of slides** to be provided to attendees.

Speaker also agrees to provide slides in the following format:

- A Word, PDF, or PowerPoint attachment sent via email to bmbell@email.unc.edu

Securing permission for use within the slide presentation of any material under copyright is the speaker's responsibility. Release and/or letters of permission, if required, shall be provided by the speaker to UNC ESOP OLL at the time slides are provided.

If you do not wish for your presentation to be emailed to attendees either in advance of or following the delivery of the educational program, please submit your request in writing to Barbara Bell, bmbell@email.unc.edu, no later than thirty (30) days prior to the initial delivery of the educational program. Unless such a written request is received in the time specified, UNC ESOP OLL reserves the right to distribute the presentation in an Adobe Acrobat PDF format to all webinar attendees in advance of or following the delivery of the educational program.

Please note, final presentation materials must be received no later than 10 days prior to your presentation date for review and reproduction for distribution to attendees. (UNC ESOP OLL reserves the right to modify the handout and require re-submission to adhere to ACPE Guidelines).

Please follow these guidelines for developing and submitting your PowerPoint presentation:

- * Text should not be smaller than 18 points to be visible on the screen.
- * Submit handouts and PowerPoint presentations electronically.
- * Include supplement materials for future reference purposes (such as articles or sample forms).
- * Include a bibliography of related literature in your handout, especially if you refer to certain studies or publications in your presentation.
- * No commercial information of any kind is to be included in your handout.
- * Avoid ALL CAPS.

BIOGRAPHY AND CV

Please provide a brief paragraph format biography in a Microsoft Word document as well as an updated CV. This biography will be used to introduce you during the program and also for promotional purposes to inform potential educational program participants. The CV is required by ACPE to help verify the speaker is knowledgeable and has an understanding of the program topic. Email your biography and CV to [Barbara Bell: bmbell@email.unc.edu](mailto:bmbell@email.unc.edu).

GAP ANALYSIS AND ACTIVE LEARNING PLAN

The Gap Analysis is used to describe what is currently done in practice compared to best practice, thereby identifying the gap in practice and need for education.

ACPE **requires the use of active learning strategies** in all continuing pharmacy education (CPE) activities. The Active Learning Plan outlines these activities in relation to the program objectives. Audience polling questions, cases, Q&A, and other activities can be used with in the presentation to create an active learning environment. Each learning objective should have an active learning activity that provides you and the audience learner a form feedback and assessment.

CONFLICT OF INTEREST

It is the policy of UNC ESOP OLL to insure balance, independence, objectivity, and scientific rigor in all its individually or jointly sponsored CE programs. All meeting planners and faculty participating in any UNC ESOP OLL programs are expected to disclose any real or apparent relevant financial relationships that may have a direct bearing on the subject matter of the continuing education program. (Note: If you are a resident presenter, then you are required to have a presentation advisor and they will also be required to submit a conflict of interest disclosure). This information, for anyone that may influence the content of the presentation, will be disclosed to the audience on the second slide of your presentation materials, after the program title slide.

Approved Disclosure Slide Wording: I have no relationships with commercial interests related to content of this presentation

- **Review, complete and return a signed and dated “Disclosure of Relevant Financial Relationships with Commercial Interests”** via e-mail to Barbara Bell: bmbell@email.unc.edu

VIDEO/AUDIO RECORDING

The aforementioned educational program may be distributed by UNC ESOP OLL in an audio, visual or print format. UNC ESOP OLL may distribute your recorded presentation to webinar attendees that wish to purchase the online recorded version. UNC ESOP OLL may syndicate your live and recorded presentation to syndicated state pharmacy associations thereby offering this program to their members. All claims for royalties in conjunction with the sale of this webinar, DVD/CD's or handout materials are waived. Your signature on this agreement represents your consent to the recording of your remarks UNC ESOP OLL's right to copy and distribute them.

CONFIRMATION

PRESENTATION

Session Date and Time: _____ **from** _____ **EST**

Please see the presentation section of this speaker agreement for further details.

IMPORTANT DEADLINES

DEADLINE DATE: 30 days prior to presentation

- Speaker Agreement with session description and learning objectives due
- Biography and CV submission due
- Conflict of Interest form due
- Completed Gap Analysis
- Completed Active Learning Plan

DEADLINE DATE: 10 days prior to presentation date

- Slide Presentation/Handout submission due

I have read the terms of this Speaker Agreement between UNC ESOP OLL and myself for the program, “_____”, on _____ and agree to the terms presented. There are no other terms or conditions to my engagement other than those written here. There can be no changes unless agreed to in writing.

Failure to comply with the handout requirements described in the Presentation Materials section above will also result in the loss of compensation.

Print Full Name

UNC ESOP

Signature

Date

Date

Please complete and return to bmbell@email.unc.edu

Office of Lifelong Learning
Eshelman School of Pharmacy
The University of North Carolina
Campus Box 7574, Beard Hall
Chapel Hill, NC 27599
Telephone: 919.962.5382

Disclosure of Relevant Financial Relationships with Commercial Interests

It is the policy of the Office of Lifelong Learning to insure balance, independence, objectivity, and scientific rigor in all its individually or jointly sponsored CE programs. All meeting planners and faculty participating in any University of North Carolina Eshelman School of Pharmacy Office of Lifelong Learning are expected to disclose any real or apparent relevant financial relationships that may have a direct bearing on the subject matter of the continuing education program. Disclosure pertains to relationships with any pharmaceutical companies, biomedical device manufacturers, or other corporations whose products or services are related to the subject matter of the program planning and / or presentation topic. This relevant information will be obtained from all program planners and speakers and summarized in the program packet and disclosed in the presentation materials.

The intent of this policy is not to prevent a meeting planner or speaker with potential relevant financial relationship with commercial interest from planning or making a presentation after review and resolution / approval by this ACPE provider. It is intended that any potential relevant financial relationship should be disclosed so that the audience can form their own opinion about any bias in the planning or presentation.

CE Program Name: _____

Title of the Presentation: _____

Planner's / Presenter's Name: _____

I have no actual or potential relevant financial relationship with commercial interest in relation to this program.

Signature

Date

I or my spouse/domestic partner have a relevant financial relationship with commercial interest(s) or affiliation with one or more organizations within the past 24 months that could be perceived as a real or apparent relevant financial relationship in the context of the planning or subject of this presentation, including but not limited to: consulting; a family member employed by the organization; a fiduciary responsibility; membership on a governing board; recipient of a grant or research support; a major stockholder; receiving other financial or material support; and/or membership on a speaker's bureau.

Name of Organization

Name of Relationship

Signature

Date

Please return this form as soon as possible to the Office of Lifelong Learning at the address shown above.

Active Learning Plan for _____

Complete a row for each learning objective you will cover during your presentation. Provide a copy to your host when you submit your slides for review.		
Learning Objective	Planned Active Learning Activity	How Active Learning Activity Will Be Assessed

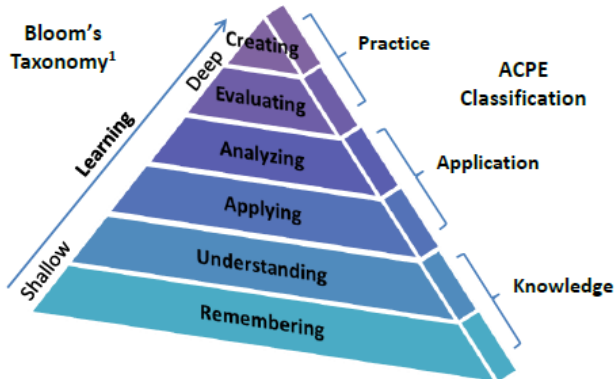
Gap Analysis Form

Directions: Please complete this form by describing current practice compared to best practice, thereby identifying the gap in practice and need for education.

Current Practice	Best/Better Practice	Educational Need	Activity Type (Knowledge, Application)
<i>Example: An Estimated 70-80% of patients undergoing chemotherapy experience nausea and vomiting</i>	<i>Only 10% of patients undergoing chemotherapy should experience nausea and vomiting</i>	<i>Pharmacists should know that poorly controlled CINV can result in weakness, weight loss, electrolyte imbalance, dehydration, or anorexia among chemotherapy patients</i>	<i>Knowledge-based to address lack of knowledge on consequences of CINV</i>
			<p>Knowledge</p> <p>Application</p> <p>Rationale:</p>
			<p>Knowledge</p> <p>Application</p> <p>Rationale:</p>

CPE Activity Guidance

ACPE has defined three types of CPE-based activities designated by their expectations of the audience members. Level of expectations for an activity may vary based on the pre-established baseline knowledge of the audience or the amount of time allocated to building the knowledge and skills of the audience members during the CPE activity. This document defines the ACPE-Activities and can assist with identifying appropriate learning expectations through developing activity objectives with appropriate action verbs and potential active learning strategies to assess the effectiveness of the audience's ability to meet an objective.



Knowledge-Based CPE Activity:

primarily constructed to transmit knowledge (i.e., facts). The facts must be based on evidence as accepted in the literature by the health care professions. Transmitting knowledge is usually assessed at the cognitive domains of remembering and understanding. The minimum amount of credit for these activities is 15 minutes or 0.25 contact hour.

Suggested Objective Verbs			Suggested Active Learning Techniques
<i>Knowledge-type verbs (Remembering)</i>			<ul style="list-style-type: none">• Lecture• Visuals• Examples• Illustrations• Analogies
Define	Record	List	
Label	Select	Record	
Match	State	Recall	
Name	Repeat		
<i>Comprehension-type verbs (Understanding)</i>			<ul style="list-style-type: none">• Test/Assessment• Review• Writing• Presentations• Matching questions/answers• Questions• Discussion• Report
Discuss	Recognize	Restate	
Describe	Identify	Express	
Explain	Translate	Classify	
Locate	Outline	Summarize	
Review	Report		

- For knowledge-based CPE activities, only verbs listed within this table should be used when developing objectives.

CPE Activity Guidance

Application-based CPE Activity

primarily constructed to apply the information learned in the time frame allotted. The information must be based on evidence as accepted in the literature by the health care professions. Applying information is usually assessed at the cognitive domains of applying and analyzing. The minimum amount of credit for these activities is 60 minutes or one contact hour.

Suggested Objective Verbs			Suggested Active Learning Techniques
<u>Application-type verbs</u>			<ul style="list-style-type: none">• Role play• Simulations• Practice exercises• Demonstrations• Projects
Interpret	Employ	Use	
Apply	Demonstrate	Illustrate	
Practice	Operate	Produce	
<u>Analysis-type verbs</u>			<ul style="list-style-type: none">• Case studies• Problems• Discussion• Pro/con grids• Application exercises
Distinguish	Analyze	Differentiate	
Calculate	Compare	Contrast	
Criticize	Debate	Diagram	
Discriminate	Examine	Interpret	
Investigate	Research	Test	

- For application-based CPE activities, a combination of knowledge-based and application-based verbs may be used when developing objectives.

Practice-based CPE Activity:

Do Not Use

primarily constructed to instill, expand, or enhance practice competencies through the systematic achievement of specified knowledge, skills, attitudes, and performance behaviors. The information within the practice-based CPE activity must be based on evidence as accepted in the literature by the health care professions. The formats of these CPE activities should include a didactic component (live and/or home study) and a practice experience component (designed to evaluate the skill or application). This should employ an instructional design that is rationally sequenced, curricular based, and supportive of achievement of the stated professional competencies. Instilling knowledge, skills, and attitude are usually assessed at the cognitive domains of evaluating and creating but can also include other cognitive domains. The minimum amount of credit for these activities is **15 contact hours.**

Suggested Objective Verbs			Suggested Active Learning Techniques
<u>Evaluation-type verbs</u>			<ul style="list-style-type: none">• Case studies• Problem exercises• Projects• Critiques• Simulations
Recommend	Compare	Select	
Evaluate	Revise	Criticize	
Rate	Appraise	Assess	
Justify	Support	Propose	
<u>Synthesis-type verbs (Creating)</u>			<ul style="list-style-type: none">• Problems• Case studies• Develop plans• Simulations• Projects
Plan	Compose	Design	
Propose	Formulate	Arrange	
Construct	Create	Set up	
Organize	Prepare	Develop	
Generate			

- For practice-based CPE activities, a combination of knowledge-based, application-based, and practice-based verbs may be used when developing objectives.

CPE Activity Guidance

When applicable, we encourage speakers to utilize the Joint Commission of Pharmacy Practitioners (JCPP) Pharmacists' Patient Care Process Model for developing learning activities.

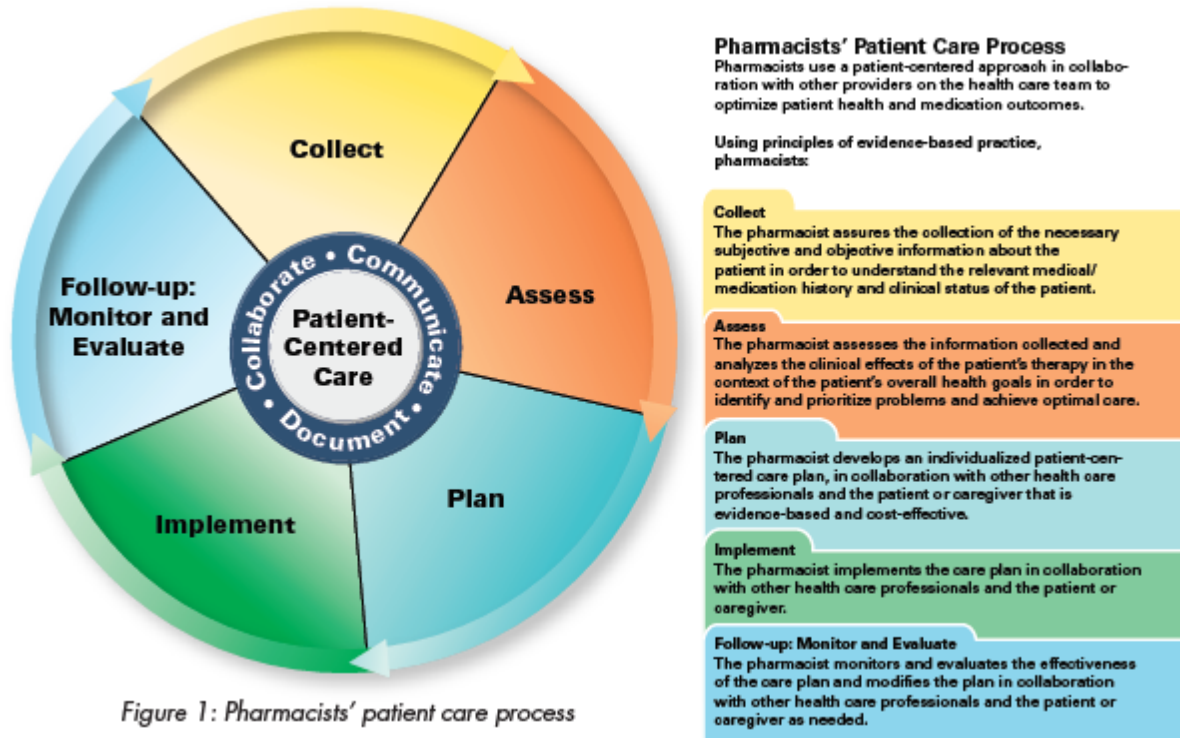


Figure 1: Pharmacists' patient care process

Adapted from

- ACPE Accreditation Standards for Continuing Pharmacy Education. 2017
- Phillips, L. *The Continuing Education Guide The CEU and other Professional Development Criteria*. 1994
- Framework for CPE Activity Types and Learning Objectives. ACPE. 2017
- Joint Commission of Pharmacy Practitioners (JCPP) Pharmacists' Patient Care Process. 2014

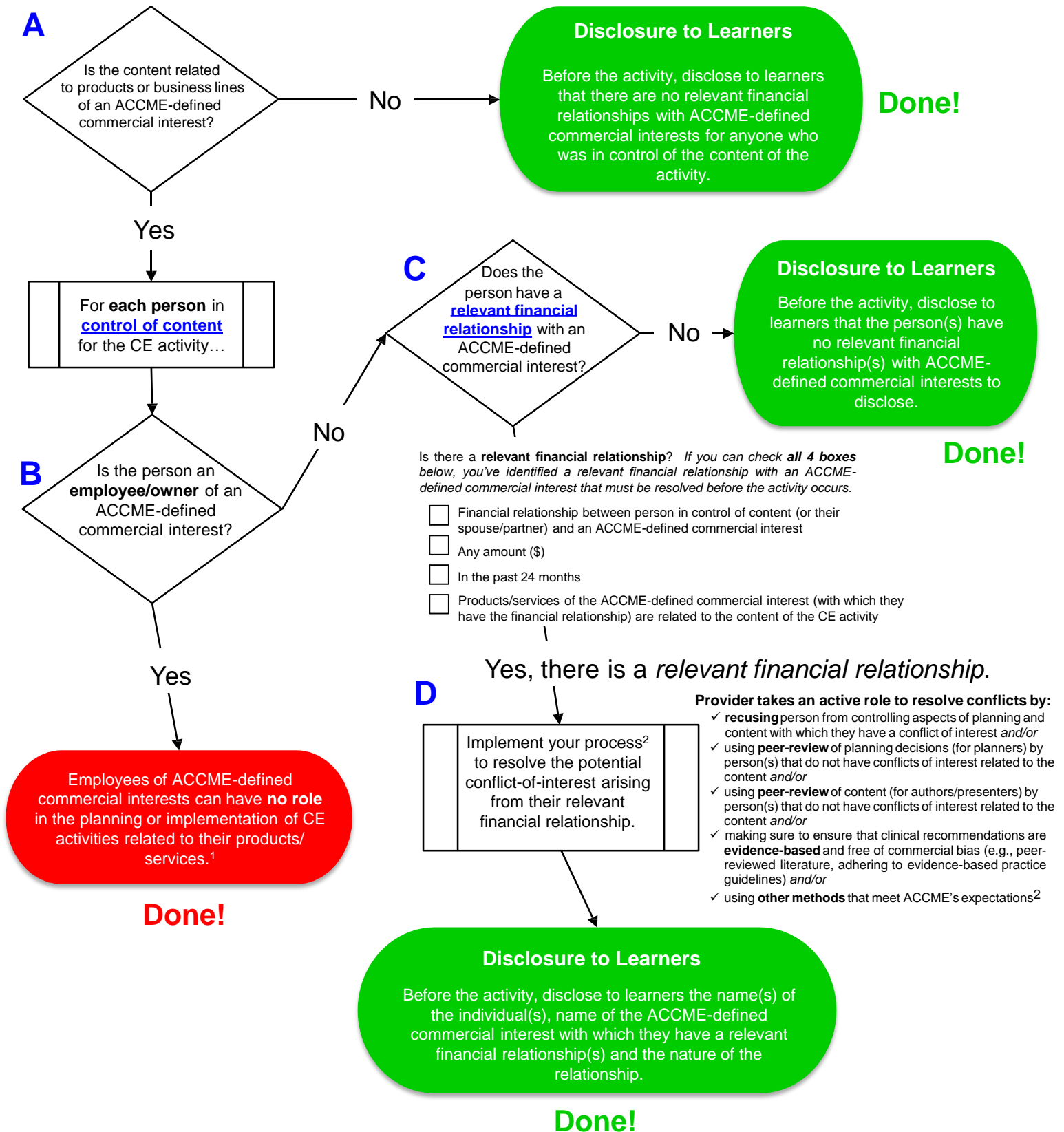


Flowchart for the Identification and Resolution of Personal Conflicts of Interest

(Last updated: February 1, 2017)



Use this flowchart at the beginning of your planning process for CE activities to ensure independence from ACCME-defined commercial interests. **Start at A below.** For step-by-step instructions for using this flowchart, visit www.accme.org/coiflowchart.



Footnotes

1. The use of employees of ACCME-defined commercial interests as faculty and planners or in other roles where they are in a position to control the content of accredited CE is prohibited, except in specific situations. For more information, visit [this Ask ACCME frequently-asked-question](#) regarding commercial employees.
2. There are a range of approaches providers can use to resolve potential conflicts of interests. For more information, visit ACCME's [Provider Examples of Compliance and Noncompliance](#). ACPE-accredited providers can find examples and resources on the [ACPE website](#).