

THE COLLEGE OF  
FAMILY PHYSICIANS  
OF CANADA



LE COLLÈGE DES  
MÉDECINS DE FAMILLE  
DU CANADA

# QUICK TIPS

## Identification and Management of Conflicts of Interest and Transparency to Learners

For presenters and planning committee members  
of Mainpro+<sup>®</sup> certified programs and events

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## What is conflict of interest? Why is it important?

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A conflict of interest is a set of conditions in which judgement or decisions concerning a primary interest (e.g., a patient's welfare, the validity of research, the quality of medical education) is unduly influenced by a secondary interest (personal or organizational benefit including financial gain, academic or career advancement, or other benefits to family, friends, or colleagues).

The purpose of identifying and addressing potential conflicts of interest is to ensure proper balance, independence, objectivity, and scientific rigor for educational activities.

The College of Family Physicians of Canada (CFPC) does not view the existence of a financial relationship itself as necessarily implying bias or decreasing the value of an individual's participation in a continuing professional development (CPD) activity. However, when actual or potential conflicts of interest are identified, organizers (as well as presenters, facilitators, and authors) must ensure that they are appropriately addressed.

## Who should disclose conflicts of interest? What should be disclosed?

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Anyone in a position to control the content of a CPD activity should disclose any and all potential conflicts of interest that are relevant to the content of the presentation and resolve them prior to the CPD activity. The CFPC requires all members of scientific planning committees, speakers, moderators, facilitators, and authors to complete the CFPC Mainpro+® Declaration of Conflict of Interest form.

Examples of potential conflicts of interest include the following:

- Any direct financial or in-kind interest in a for- or not-for-profit entity such as a pharmaceutical organization, medical device company, communications firm, government agency, charitable organization, patient advocacy group, research groups, or other sources of financial and in-kind relationships (the organization) with relevance to the CPD activity content or development
- Investments held in the organization
- Membership on the organization's advisory board or similar committee

- Participation—current or recent—in a clinical trial sponsored by the organization
- Membership in a speakers' bureau connected to the organization
- Any other paid relationship with the organization
- Patent holder for a product, drug, or device referred to in the CPD activity

Organizers of CPD activities can prevent or reduce the risk of conflict of interest by selecting scientific planning committee members, speakers, authors, and facilitators who do not have relationships to organizations related to the content. They may also assign to the speaker/author/facilitator aspects of the content that do not place the presenter in a potential conflict of interest.

## There might be a conflict of interest— now what?

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Once a conflict of interest is identified, organizers of a CPD event must determine if the conflict of interest can be practically managed. If it cannot, organizers will need to select another presenter; in the case of scientific planning committee members, they will need to be replaced.

Appropriate mechanisms for resolution can include altering control over content, or independent content validation.

## Altering control over content

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- Choose someone else to present the problematic part of the content
- Change the focus of the CPD activity so that the content is not about the products or services of the supporting organization, if that is the basis of the conflict of interest
- Limit the content presented by the person in question to a report of the data without providing recommendations; another presenter can be assigned to address broader implications and recommendations
- Limit the sources for recommendations
- Limit the role of the speaker/facilitator in question to reporting recommendations based on formal structured reviews of the literature, along with a clear statement of the inclusion and exclusion criteria; that is, present information that is explicitly evidence-based rather than personal recommendations, or select the evidence to be presented



## Independent content validation

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Conflict of interest may be resolved if: the CPD material is peer reviewed; all the recommendations involving clinical medicine are based on evidence that is accepted within the profession; and all scientific research referred to, reported, or used in the CPD activity in support or justification of patient care recommendations conforms to the generally accepted standards. Determining the right course of action can be facilitated by asking a few useful questions:

- How were the topics and the presenter/facilitator/author determined?
- What content is expected to be included in the presentation?
- Will the speaker be making clinical recommendations?
- What sources of evidence will support the presentation?

Organizers of CPD activities should maintain documentation of the resolution of conflict of interest in their files.

## How do we address transparency?

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CPD event organizers and presenters must take steps that allow participants to make independent judgments on the relationships identified and management strategies employed to deal with any conflicts of interest.

For Mainpro+ certified programs, the CFPC requires additional slides/steps with specific disclosure information about potential conflicts of interest to supplement the traditional one-slide/step format providing information about the speaker only. Scientific planning committees must take ownership of the content of these conflict of interest disclosure slides/steps to the same extent they do the content of the rest of the educational program.

At the start of each live activity certified by the CFPC, program facilitators/chairs must present the three-slide/step conflict of interest declaration:

- Slide/Step 1: Faculty/Presenter Disclosure—Personal relationships with for-profit and not-for-profit interests (one slide/step per faculty member/presenter).
- Slide/Step 2: Program Disclosure of Financial Support—Specific outline of connections/support for development/presentation of the program from external entities (for-profit and not-for-profit) or organizations including educational grants, in-kind services (e.g., logistics) AND specific aspects of the faculty/presenter connections that a reasonable program participant might consider relevant to the presentation, (e.g., products made by companies named in Slide/Step 1 that could be germane to the presentation). This slide/step should be completed and presented by the scientific planning committee
- Slide/Step 3: Mitigation of Bias—Description of measures taken by the scientific planning committee to deal with and mitigate potential sources of bias in the presentation.

For live activities, these slides/steps are to be visually and verbally presented to the audience. Sufficient time **must** be allowed for the audience to read and comprehend the information being shared. There must be an opportunity for the audience to ask questions about the disclosure should they arise.

Templates provided by the CFPC must be used (see below); however, colours and slide themes may be modified to match that of the program.

## INSTRUCTIONS

- Examples are shown below; the **bold** text within brackets must be modified by the scientific planning committee or course director, as per the program
- Where a faculty/presenter has no relationships to disclose, indicate **Not Applicable** under Relationships with Financial Sponsors on Slide/Step 1
- Where a program has received no external financial or in-kind support (e.g., monies for food, logistics assistance such as registration, AV set-up), indicate **No External Support** on Slide/Step 2
- Where there are no potential biases identified in Slides/Steps 1 **and** 2, indicate **Not Applicable** on Slide/Step 3
- When a speaker/facilitator has no relationships that might pose a potential conflict of interest **and** the program has been developed without external support, Slide/Step 3 may be omitted
- Scientific planning committees **must** review and approve the content of Slides/Steps 1 and 2 for each speaker/facilitator associated with the program. Where potential for conflicts exist, the committee must discuss and approve the management plan outlined on Slide/Step 3.

### Clarifications for multi-speaker conferences and online activities

- For large events with multiple sessions and speakers, information about financial support of the entire program needs to be presented only once at the beginning of the conference, as well as in written program materials (website and/or printed program). Individual speakers need only present information about their own relationships, or lack thereof.
- If a CPD activity is delivered without using presentation software (e.g., PowerPoint, Prezzi) or other presentation aids, declaration information must be provided verbally (for live events) and in print (e.g., printed program, online module, program website). Declarations must be easily accessible to participants and follow a format similar to the three-slide/step disclosure.

#### Slide/Step 1

To be presented by speakers/facilitators as part of their presentation.

##### Faculty/Presenter Disclosure

Faculty: [Speaker's name]

- Relationships with financial sponsors:
  - Grants/research support: [PharmaCorp ABC]
  - Speakers bureau/honoraria: [XYZ Biopharmaceuticals Ltd.]
  - Consulting fees: [MedX Group Inc.]
  - Patents: [Widget ABC]
  - Other: [Employee of XXY Hospital Group]

#### Slide/Step 2

To be completed and presented by the scientific planning committee/program chair.

##### Disclosure of Financial Support

This program has received financial support from [organization name] in the form of [describe support here (e.g., an educational grant)].

This program has received in-kind support from [organization name] in the form of [describe support here (e.g., logistical support)].

- Potential for conflict(s) of interest:
  - [Speaker/faculty name] has received [payment/funding, etc.] from [organization supporting this program and/or organization whose product(s) are being discussed in this program].
  - [Supporting organization name] [develops/licenses/distributes/benefits from the sale of, etc.] a product that will be discussed in this program.

#### Slide/Step 3

To be completed and presented by the scientific planning committee/program chair.

##### Mitigating Potential Bias

- [Explain how the potential sources of bias identified in Slides/Steps 1 and 2 have been mitigated by the scientific planning committee]