



## Conflict of Interest (COI) Management at UBC CPD

Note: these instructions have been developed by UBC CPD for internal use. Other organizations are welcome to use these instructions as a guide for managing conflict of interest disclosures.

### Instructions

#### STEP 1: Collect information

- ✓ Collect the UBC CPD COI disclosure form:
  - for every Scientific Planning Committee (SPC) member as the committee is being formed
  - for every content contributor (presenters, facilitators, authors etc.) as soon as they are identified

Assign to: Staff or SPC member

#### STEP 2: Exclude HPI owners/employees

- ✓ Identify any owners or employees of **health care/pharmaceutical industry commercial interests** (HPIs; see definition below) → Exclude these individuals

*Per the National Standard and the UBC CPD Ethical Standards for Accreditation, HPI owners and employees cannot serve as SPC members or content contributors.*

Assign to: SPC chair or staff manager (use UBC CPD Ethical Standards for Accreditation for guidance)

#### STEP 3: Determine if the relationship is relevant

- ✓ Review any disclosed relationships → are they relevant to the CPD activity?

Assign to: SPC / SPC chair (use UBC CPD Ethical Standards for Accreditation for guidance)

#### STEP 4: Mitigate relationship

- ✓ For any relevant relationships → mitigate potential impact on the CPD activity.

Assign to: SPC / SPC chair (use UBC CPD Ethical Standards for Accreditation for guidance)

#### STEP 5: Inform learners



- ✓ For each SPC member and content contributor, inform learners of all disclosed relationships, where applicable, and describe the mitigation strategy.

Assign to: Staff or SPC member (use UBC CPD Ethical Standards for Accreditation for guidance)

#### STEP 6: Check content for bias

- ✓ Where feasible, check content for indications of bias *before* it is made available to learners.

Assign to: Staff or SPC member (use UBC CPD Ethical Standards for Accreditation for guidance)

#### STEP 7: If bias is detected, inform and take appropriate action where necessary

On occasion, bias may be detected by learners or others *after* content is available to learners.

- ✓ Ensure responses to the evaluation question regarding bias is reviewed
- ✓ Share information regarding detection of bias with the SPC and UBC CPD Accreditation team.
- ✓ SPC and UBC CPD Accreditation team review information regarding bias. If a serious issue is detected and/or the CPD activity is found to be non-compliant, take appropriate action. Actions may include:
  - a. in cases of non-compliance, follow **UBC CPD Non-Compliance procedures**
  - b. inform content contributors\* and/or remove/update content
  - c. inform learners\*
  - d. inform those who detected bias (when known)\*
  - e. SPC debrief to inform future CPD activities
  - f. update content contributor records to inform future CPD activities

\*For any external communication, consult with UBC CPD Communications team.