
Funding Playbook: Bringing Financial Innovation & Creativity to Continuing Education

A Resource Guide

A product of the
Using Innovation and Creativity to Fund Your CME/CPD Activities
Working Group at Learn to Thrive 2023

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Introduction

Raising funds to support accredited continuing education (CE) can be challenging. Financial models for CE or continuing professional development (CPD) departments and programs are ever changing, volatile, and dependent upon many factors.

This Funding Playbook is designed to provide CE/CPD professionals develop strategies for exploring funding opportunities in the context of ensuring compliance with accreditation requirements. The authors of this resource—CE and CPD professionals—offer insights to fundraising based on their own experiences and lessons learned.

Fifty-three educational leaders from 47 institutions convened the *Using Innovation and Creativity to Fund Your CME/CPD Activities* Working Group at the Accreditation Council for Continuing Medical Education (ACCME) 2023 Learn to Thrive meeting in Chicago followed by monthly virtual meetings from July through November 2023. This effort was built upon the work of a Funding Working Group that was initiated in 2020 to address the changing landscape in funding to support accredited CE as a result of the global pandemic.¹

The Working Group addressed the following concerns:

- Accredited CE professionals often feel uncomfortable talking about money.
- Funding development takes place in different silos that can depend on the type of organization.
- Colleague organizations may be viewed as competitors for funding dollars.
- There are few tools available to help CE providers developing fundraising skills and strategies.
- Availability of funds (e.g. commercial support, grants) is ever-changing.

1. Donawa, A.M. (2020) Funding working group. Philadelphia, PA.

Using Innovation and Creativity to Fund Your CME/ CPD Activities Working Group

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Accreditation Guidelines

Accredited CE providers use accreditation requirements to guide the creation of high-quality education that is independent of industry influence. Companies that are ineligible for accreditation—as defined in the Standards for Integrity and Independence of Accredited Continuing Education®—are those whose primary business is producing, marketing, selling, re-selling, or distributing healthcare products used by or on patients.

Since healthcare professionals serve as the trusted authorities when advising patients, accredited CE must protect their learning environment from industry influence and ensure they remain true to their ethical commitments. When healthcare professionals who have a role in CE have financial relationships with ineligible companies, CE professionals identify and mitigate relevant financial relationships to create a protected space to learn, teach, and engage in scientific discourse free from influence from ineligible organizations that may have an incentive to insert commercial bias into education.

View the Standards for Integrity and Independence in Accredited Continuing Education®

<https://www.accme.org/accreditation-rules/standards-for-integrity-independence-accredited-ce>

Institutional Guidelines

CE and CPD offices vary widely in the approaches they use to fund accredited educational programs. Although education providers may be for-profit organizations, this resource will be most applicable to academic and non-profit organizations. Institutional and organizational financial guidelines will be dictated by their parent organization.

In the realm of non-profit organizations, some are partially or fully funded by their institutions, some are expected to be self-supporting, and some are expected to return revenue to the organization to which they belong. CE/CPD offices generate revenue through registration fees; funding from grants originating from eligible/ineligible companies, state and federal government sources, and foundations; donations; tuition; fees for services such as accreditation, program management, financial management, conference management for both internal or external partners; exhibits, sponsorships, and product theatres; and subscriptions. Some groups' overall expenses include not just salaries, fringe benefits, and direct activity expenses, but also fees imposed by their organization such as indirect expenses against revenue and/or administrative overhead.

Understand Your Financial Needs

As an accredited provider, seek to understand the actual costs of the work that you do by assessing how much time it takes your program to plan and deliver education as well as providing services such as joint providership (i.e. partnering with non-accredited organizations to develop accredited CE). These calculated costs should include salaries and fringe benefits of the individuals who support the work and overall office costs such as accreditation fees paid annually to accrediting bodies (e.g., ACCME, American Nurses Credentialing Center (ANCC), Joint Accreditation, etc.) and annual learning management system licensing fees. If your CE program is expected to transfer revenue to the overall organization, those costs should be included.

Institutional Guidelines

Tracking Strategies to Measure Your Fundraising Success

It is beneficial to maintain a database (or even a simple spreadsheet) of potential funders that includes links to grant application portals, contact information, areas of clinical interest, fiscal year, links to transparency reports, and any information related to grant funding. Successful funding management requires tracking the applications your program submits in a centralized database that includes the following variables to calculate grant success rate trends over time:

- Name of the potential funder
- Amount requested
- Therapeutic area of interest
- Educational format
- Application date
- Funder response date
- Application decision including the amount funded if the decision is positive

Educational Grants

Funding for independent continuing education comes from various sources. It is important for applicant organizations to carefully review the funder's requirements to determine if your organization is eligible to apply for funding.

General tips for seeking grants:

- Protect staff time for development of grant applications.
- Seek partners who can help you navigate the processes involved in pursuing grants from different sources, such as foundations, industry, and government agencies.
- As many grantors award funds from finite budgets provided on an annual basis, submit your grant proposals as early as possible in the fiscal year (i.e., complete all submissions in the first quarter of the year).
- Identify potential grantors whose interests (e.g. mission, stated goals, therapeutic areas) are aligned with your organizational mission and CME Mission.
- Familiarize yourself with grantmaking processes—particularly timelines and requirements—for any grantors you are considering.

Educational Grants

The Grant Process

Planning

All grantors are interested in using funds to support effective education. As you pursue grants, consider the following approaches to enhance your educational impact.

- Consider multimodal educational interventions.
- Provide learners with opportunities to apply what they learn and receive feedback.
- Design longitudinal education initiatives, rather than “one and done” activities.
- Define the overall education purpose and outline specific reasons why funding support is necessary. For example, creation of a published survey, research project, or development of a new quality improvement tool.
- Use the Plan, Do, Study Act (PDSA) model to demonstrate how continuous improvement will inform educational interventions and their impact.
- Apply the Inclusion, Diversity, Equity, Accessibility (IDEA) principles to develop learning opportunities.²
- Conduct a needs assessment to define the professional practice gap(s)—that is, the difference between actual and desired professional practice and/or outcomes for learners and patients.
- Identify gaps using methods such as examining current practices in comparison to clinical practice guidelines, searching medical literature, using epidemiological data, reviewing published data from recent conference or scientific meetings, reviewing data from registries, reviewing follow-up survey data from past activities, and public health data.
- Use Bloom’s Taxonomy or other frameworks² to define clear learning objectives that help learners to understand what the education will help them to accomplish.

2. For tools and examples applying these frameworks to accredited CE, see the CE Educator’s Toolkit (<https://www.accme.org/ceeducatorstoolkit>).

Educational Grants

- Identify the learners best served by the education and ways to effectively engage them. Identify whether the education is targeting an interprofessional audience (i.e. comprised of two or more different professions).

Developing the Grant Proposal

- Use a mind map or chart to identify and link professional practice gaps, educational needs, learning goals/objectives, and desired results of the education.
- Include evaluation and outcomes assessments using frameworks² such as the Reach, Effectiveness, Adoption, Implementation, Maintenance (RE-AIM) Framework, the Kirkpatrick Barr framework with four levels of education outcomes; and/or Moore's Expanded Outcomes Framework.
- Utilize approaches to measure and analyze learner change(s) and/or patient/community health outcomes through feedback surveys, pre-/post-tests, learners' reflective statements, structured interviews, clinical vignettes, simulation, learning from teaching, chart audits, quality improvement or other data sources.
- Develop an Executive Summary that briefly describes the process used to identify professional practice gaps, underlying educational needs, and learning goals/objectives. Focus on clear and concise language to make it easy for potential funders to understand and evaluate your program's proposal.
- Share a rationale for how you chose educational formats, how they will be implemented, and how you intend for them to contribute to meeting learning goals/objectives.
- Include interactive elements and active learning to enhance learner engagement and outcomes.
- Identify and select faculty as early as possible.
- Develop a budget. Grant supporters often have their own budget templates that may include financial thresholds for some budget line items, descriptions of expenses that can or cannot be included, and expectations to itemize both estimated costs and actual costs.

Educational Grants

- Be strategic when seeking support from several different grantors. Consider identifying alternative sources and the amount(s) being requested.

Letters of Agreement (LOA)

- Consider including an explicit statement that the commercial supporter will comply with Standards for Integrity and Independence in Accredited Continuing Education, including the expectations of Standard 4: Manage Commercial Support Appropriately.³
- Name of the entity who is the accredited provider of the educational activity.
- Contact information for the commercial supporter.
- CE activity name, date, and location (for live meetings only)
- For Jointly Provided⁴ activities, name(s) of the partnering organization(s).
- Amount of monetary commercial support and/or description and value of in-kind commercial support.
- Signature of commercial supporter representative, accredited provider, and any partnering organization(s). Some commercial supporters may issue written agreements for commercial support electronically that require an electronic signature of acceptance by the accredited provider.

Budget Reconciliation

- After the educational initiative is completed, budget reconciliation is required for all CE activities as part of the final reporting for the accredited provider and grantor(s). For monetary commercial support, the commercial supporter's name, financial amount of support (dollar value), and details of how the funds were utilized toward the CE activity must be summarized for each commercial support contribution.

3. See the Standards for Integrity and Independence in Accredited Continuing Education™, <https://www.accme.org/accreditation-rules/standards-for-integrity-independence-accredited-ce>.

4. For more information about Joint Providership, see <https://www.accme.org/accreditation-rules/policies/joint-providership>.

Educational Grants

- Financial reconciliation is the key to demonstrating that the actual costs of the grant were aligned with what was originally estimated.
- The grantor may use the financial reconciliation to evaluate costs for future budgets in given therapeutic areas.
- Unused grant funds may have to be returned to the grantor.
- The timeframe for financial reconciliation is usually 90 days and should be completed on time to not jeopardize for future funding opportunities.

Outcomes Reporting

- Measuring educational outcomes, as required by ACCME and Joint Accreditation, is an important way for CE providers, joint providers, and grantors to understand the impact of CE on improving learners'/teams' competence (i.e. strategies), performance, and/or patient outcomes and community health.
- Outcomes reporting can also demonstrate the degree to which the education reached its intended audience.
- Consider using Moore's Expanded Outcomes Framework as an approach to measure impact of education.⁵

5. Moore, D. E., Jr, Green, J. S., & Gallis, H. A. (2009). Achieving desired results and improved outcomes: integrating planning and assessment throughout learning activities. *The Journal of continuing education in the health professions*, 29(1), 1-15. <https://doi.org/10.1002/chp.20001>.

Educational Grants

Types and Sources of Grants

Educational grants can be obtained from foundations, government agencies, organizations, and companies. Funding can be obtained from companies or institutions that are either eligible or ineligible for accreditation within the ACCME system. The following sections provide an overview of grants obtained from ineligible and eligible companies.

Ineligible Company Grants (Commercial Support)

The Standards for Integrity and Independence of Accredited Continuing Education™ provide expectations that accredited CE providers use to create education that creates, “a clear, unbridgeable separation between accredited continuing education and marketing and sales.” When seeking funding it is imperative to determine if the grantor is an eligible or ineligible company.

The ACCME defines an ineligible company⁶ as any company whose primary business is producing, marketing, selling, re-selling or distributing healthcare products used by or on patients. An educational grant from an ineligible company is **commercial support**. Ineligible companies that offer commercial support typically have a competitive online application process. These companies may also issue Requests for Proposals (RFP) that align with their specific product and service offerings and/or the company’s mission. If a commercial support grant is awarded, a written agreement (also known as a letter of agreement [LOA]) is required and must be fully executed before the accredited education activity occurs. It is important to note that this agreement applies to both in-kind support as well as monetary support. Accredited providers must also disclose to the audience prior to the activity, the names of the ineligible company(ies)—for in-kind support—nature of the support. Companies’ corporate or product logos, trade names, proprietary font(s), or product group messages may not be included as part of the disclosure.

6. For information regarding eligibility, see the Standards for Integrity and Independence in Accredited Continuing Education: Eligibility at <https://www.accme.org/accreditation-rules/standards-for-integrity-independence-accredited-ce/eligibility>.

Educational Grants

Be aware that ineligible companies may have separate legal entities with distinct legal restrictions that are established as charitable organizations. **The ACCME considers these types of organizations as ineligible companies and Standards for Integrity and Independence in Accredited Education would apply for any funding received.**

Learn More:

ACCME Standards for Integrity and Independence in Accredited Education

<https://www.accme.org/accreditation-rules/standards-for-integrity-independence-accredited-ce>

Educational Grants

Funding from Eligible Companies

Financial support for accredited CE from eligible companies can include grants from private or public not-for-profit local and national associations and foundations. Like institutional grants, foundations award financial grants to support education that aligns with their mission and strategic initiatives. ACCME does not consider these grants to be commercial support if the granting organizations meet the definition of eligibility for accreditation.

According to their website, the **Patient-Centered Outcomes Research Institute (PCORI)** is, “an independent, nonprofit research organization that seeks to empower patients and others with actionable information about their health and healthcare choices. PCORI funds comparative clinical effectiveness research (CER), which compares two or more medical treatments, services, or health practices to help patients and other stakeholders make better informed decisions.”

<https://www.pcori.org/funding-opportunities/what-who-we-fund>

The **Physicians Foundation** is a national organization that provides grants specifically for education that strengthens the physician-patient relationship, supports medical practices' sustainability, and helps physicians be leaders in the ever-changing healthcare system. The Physicians Foundation grant proposals are reviewed and awarded on a quarterly basis to nonprofits, universities, hospital systems and medical society foundations through a solicited request for proposal process. The Physicians Foundation requires that applicant organizations must be tax exempt under section 501(c)(3) of the Internal Revenue Code or educational institutions, not a private foundation as defined in the IRC section 509(a), and located in the United States.

<https://physiciansfoundation.org/grants/>

Educational Grants

Learn More:

Look to Candid's **Foundation Directory** and **GuideStar** webpages to research information about not-for-profit organizations and foundations, including publicly available financial reports and information about their mission, strategic priorities, governance, and stakeholders served.

<https://candid.org/>

Educational Grants

Government Grants

Several federal agencies provide financial support via grants to improve the quality of the healthcare system, the skills and performance of health professionals, and the health of the nation. The purpose of these grants is to enhance the quality of healthcare by ensuring that healthcare professionals have access to ongoing education, training, collaboration and research, and professional development opportunities. This can include funding for attending conferences, workshops, seminars, courses relevant to their respective fields, as well as institutional training initiatives. By investing in the education of healthcare professionals, government agencies aim to improve patient care, promote medical innovation, and address the evolving healthcare and public health challenges.

Numerous government grants are available for organizations in many industries, including healthcare, education, commerce, and other sectors. They are typically awarded through a competitive application process, and recipients may be required to demonstrate their commitment to serving the public interest and contributing to the improvement of healthcare outcomes. The specific eligibility criteria, application procedures, and the scope of educational activities covered by the grant may vary depending on the government agency or program administering the funding.

Drafting the proposal is the most taxing part of a grant application as government grants are subjected to formal criteria. Government grants can require complex reporting and data tracking to ensure accountability as the money comes from taxpayers.

Grant funding for CE from government agencies may vary by region, so it is important to check with specific government agencies at the national, state, or local level.

Many states across the country have established foundation grants that support education that address individual health and healthcare needs as well as physician wellness initiatives. Funding amounts may be limited, but there is less competition for state grants. Check with your state's medical society and health department for available grants.

Educational Grants

State health departments often provide grants and funding for healthcare professionals within their jurisdiction. Check with your state's health department for information on available programs. When searching for CME grant funding, it's crucial to regularly check relevant government agency websites, subscribe to newsletters, and stay informed about new opportunities.

Sources of government funding you could explore include:

Grants.gov

<https://www.grants.gov/>

A central repository of all available federal grants. Users can customize grant search based on needs of your organization.

Agency for Healthcare Research and Quality (AHRQ)

<https://www.ahrq.gov/funding/training-grants/index.html>

AHRQ focuses on improving the safety and quality of America's healthcare system. They may have funding opportunities related to research and education. Visit their website for more information.

Federal Emergency Management Agency (FEMA)

<https://www.fema.gov/grants>

FEMA grants focus on disaster and emergency preparedness programs. Available grants focus on hazard mitigation, continuing education, etc.

Centers for Disease Control and Prevention (CDC)

<https://www.cdc.gov/grants/index.html>

The CDC may offer funding opportunities related to public health education and research. Check their website for announcements and programs that align with your CME needs.

Congressionally Directed Medical Research Programs

<https://cdmrp.health.mil/funding/>

The Congressionally Directed Medical Research Programs website provides a list of medical research opportunities in the US military.

Educational Grants

Health Resources and Services Administration (HRSA)

<https://bhw.hrsa.gov/funding/apply-grant>

HRSA may provide funding opportunities for healthcare professionals, especially those serving in underserved areas. Explore programs such as the Bureau of Health Workforce (BHW) for potential grants.

Military Health System Research Branch (MHSR)

<https://health.mil/Military-Health-Topics/Research-and-Innovation/DHA-Research-and-Engineering/Research-Support-Division/Military-Health-System-Research-Branch>

The MHSR program supports research projects with potential to innovate and improve military health care through annual grant awards. Funding for MHSR grants is made available through the Defense Health Program.

National Institutes of Health (NIH)

https://grants.nih.gov/grants/funding/funding_program.htm

The NIH may offer grants and funding opportunities for medical professionals engaged in research and continuing education. Explore the NIH website or specific institutes related to your field of interest.

Substance Abuse and Mental Health Services Administration (SAMHSA)

<https://www.samhsa.gov/grants>

SAMHSA offers training opportunities to help new organizations apply for grants related to substance abuse and mental health.

US Department of Health and Human Services (HHS)

<https://www.hhs.gov/grants-contracts/index.html>

HHS provides grants to educational and community organizations and is the largest grant-making agency in the US.

Educational Grants

Additional Resources for Information Regarding Government Grants

FederalGrantsWire

<https://www.federalgrantswire.com/medical-education-training-federal-grants-5.html>

A list of medical education and training federal grants, including some specific topics such as HIV and training for nurses.

Institutional Educational Grants

An institutional education grant is a monetary award offered by an established organization or corporation (such as a bank or university). This broad definition excludes funds awarded by the federal government. This sector awards financial grants to support education that aligns with their strategic initiatives, because many institutions have a charitable or foundational arm that is dedicated to supporting projects that further their mission and goals.

It is important to think outside the box when it comes to looking for institutional grants. Local, regional, or national corporations may operate charities that could potentially fund educational activities. For example, international corporations like McDonald's® often operate charity programs (e.g., the Ronald McDonald House Charities) that support community-based programs that can address health or healthcare. For example, a healthcare professional developing an educational event for community-based pediatricians may find they are eligible for a grant from their local Ronald McDonald House. United Healthcare's United Health Foundation awards grants for projects focused on expanding access to care and addressing social determinants of health for people in underserved communities. As you explore these opportunities, be sure to verify whether the charitable organization is an eligible company. If it is an ineligible company, grants from the organization would be considered commercial support.

Educational Grants

In addition to the institutional grants that are awarded to support a variety of research opportunities, there are grants that go beyond clinical care such as the [ChangeMedEd](#) initiative of the American Medical Association. This initiative aims to hasten the transformation of medical education by supporting the research, implementation and expansion of key innovations and projects. The American Board of Internal Medicine Foundation also provides [education grants](#) that are aligned with their mission to advance medical professionalism to promote excellence in healthcare.

There are many sources of institutional educational grants and their timelines, submission processes, and reporting requirements can vary widely. It may be more difficult to find grants in this category that award large sums for education. Nevertheless, because institutions can be found on local, state, or even national levels, they can serve as valuable resources for accredited providers who need education funding.

Suggested Resources for Community-based Opportunities

Rural Community Toolbox

<https://www.ruralcommunitytoolbox.org/funding/applicant/cbo-nonprofit>

Funding and resources to help rural communities address substance use disorders.

Advertising, Exhibits, and Promotion

Accredited education must always be separate from marketing by ineligible companies, including advertising, sales, exhibits, and promotion—irrespective of educational format (e.g. in-person, virtual, enduring materials). Although CE providers can make arrangements to allow ineligible companies to market or exhibit in association with accredited education as a source of revenue, the Standards include several expectations to ensure the separation between education and marketing.

Standard 5 of the Standards for Integrity and Independence in Accreditation Continuing Education provides expectations regarding advertising, sales, exhibits, and promotion (including nonaccredited education) by ineligible companies in conjunction with accredited CE.

Learn more about Standard 5.

<https://www.accme.org/accreditation-rules/standards-for-integrity-independence-accredited-ce/standard-5-manage-ancillary-activities-offered-conjunction-accredited>

Best-Practice Approaches for Meeting Expectations of the Standards

Planning (Compliance Consideration to protect Standard 5.1)

Make sure that arrangements to allow ineligible companies to market or exhibit in association with accredited education do not:

- Influence any decisions related to the planning, delivery, and evaluation of the education.
- Interfere with the presentation of the education.
- Be a condition of the provision of financial or in-kind support from ineligible companies for the education.

Advertising, Exhibits, and Promotion

Virtual and Hybrid Formats

- Create a separate link for the learners to be able to choose to visit exhibitors. Participants may visit exhibitors during breaks.
 - » **Compliance consideration to protect Standard 5.2:** To maintain a separation between CE and promotional activities, the booths must be held on a separate stream from the CE content (separate hyperlinks from the educational programming).
- Include an interactive link to schedule time to meet a company representative in the virtual exhibit booth. This showcases an opportunity to visit with a company representative.
 - » **Compliance consideration to protect Standard 5.2:** The booths must be held on a separate stream from the CME content (separate hyperlinks from the educational programming).
- Advance Exhibit Hall: Open a virtual exhibit hall a few weeks before the launch of the education.
 - » **Compliance consideration to protect Standard 5.2:** Even if CE content is not yet available, the virtual exhibit hall should be held on a separate stream from the upcoming education. Educational materials that are part of accredited education (such as slides, abstracts, handouts, evaluation mechanisms, or disclosure information) must not contain any marketing produced by or for an ineligible company, including corporate or product logos, trade names, or product group messages (Standard 5.2c). But, information distributed about accredited education that does not include educational content, such as schedules and logistical information, may include marketing by or for an ineligible company (Standard 5.2d).

Advertising, Exhibits, and Promotion

- Commercials/advertisements from ineligible companies: Unless separated in a virtual or physical space, promotional opportunities such as commercials or advertisements can only appear 30 minutes before or 30 minutes after accredited CE takes place.
 - » **Compliance consideration to protect Standard 5.2:** “Commercial breaks” are not permitted in between CME content. For instance, a commercial cannot air in between sessions that carry CME credit on the same stream, to ensure that learners can interact with CME content without engaging with promotional messages. Similarly, advertising is prohibited within the educational content of the CME activity (e.g., banner ads, subliminal ads, popup window ads).
- Corporate logos: Ineligible companies who provide commercial promotion may use logos only if they are placed on non-CME-related pages.
 - » **Compliance consideration to protect Standard 5.2:** If the corporate or product logos of ineligible companies will be used, they cannot be visible on any item or webpage including the educational materials and CME content (e.g., slides, abstracts, scientific program agenda). Logos should never be used in the disclosure of commercial support regardless of where disclosure is made.
 - » Consider building out a tab separate from CME-related components on the website dedicated solely to promotional content, which can include logos in addition to links to the commercial companies’ web pages. This works to highlight your promotional partners in addition to ensuring the required separation between education and promotion.

Advertising, Exhibits, and Promotion

- » Note that if a program book for a CME activity does not include educational content, i.e., if it is limited to scheduling or logistical information, ACCME policies would not prohibit that program book from including marketing by or for ineligible companies (see: Standard 5.2d). However, if a program book contains educational materials that are part of the accredited education, including disclosure information that would be required by Standards 3 or 4, that program book must not contain marketing by or for ineligible companies, including corporate or product logos, trade names, or product group messages.
- Create and send a virtual prospectus or promotional flyer with interactive hyperlinks that link out to the company's website.
 - » **Compliance consideration to protect Standard 5.2:** These approaches should not include educational materials.
- Create and send a virtual email blast with interactive hyperlinks that link out to the company's website.
 - » Use registration emails to highlight these options, and to encourage participant awareness and interest.
 - » **Compliance consideration to protect Standard 5.2:** E-mails should not include educational materials.

Advertising, Exhibits, and Promotion

There are many creative ways to fundraise for accredited educational activities. The below list includes ideas generated from the working group.

Please note: Funds provided by an ineligible company to support these items might be considered commercial support.

Exhibiting:

- Booth location:
 - » Corner
 - » Entrance
 - » Inline
 - » Island
 - » Food/beverage
 - » Virtual
 - Size:
 - » Large
 - » Medium
 - » Small
- » Bingo
 - » Challenge
 - » Childcare
 - » Community service project
 - » Cooking class
 - » Financial service
 - » Head shot
 - » Huddle space
 - » Hydration station
 - » Ice Cream Social
 - » Mindfulness class
 - » Mobile App
 - » Open bar/ Wine tasting
 - » Parking
 - » Photo booth
 - » Photographer
 - » Poster session
 - » Product Theater
 - » Quiet space
 - » Raffle
 - » Relaxation space
 - » Restroom amenity
 - » Run/walk
 - » Sanitation station
 - » Scavenger hunt

Marketing:

- Digital:
 - » Email
 - » Mobile App
 - » Newsletter
 - » Social media
 - » Website locations: Banner, Help page, Pop-up, Video
- Events/Services:
 - » Audio visual
 - » Arcade
 - » Ancillary/business meeting

Advertising, Exhibits, and Promotion

- » Snack break
- » Silent disco
- » Travel scholarship
- » Wi-Fi
- » Welcome reception
- » Yoga class
- Locations:
 - » Atrium
 - » Carpet
 - » Column
 - » Elevator
 - » Escalator
 - » Fitness room
 - » Hotel room
 - » Pool/spa
 - » Key Card
 - » Kiosk
 - » Lactation room
 - » Lounge
 - » Monitor
 - » Restroom
 - » Welcome Center
- Print:
 - » Attendee list
 - » Exhibit guide
 - » Program location: Center, Back cover, Bellyband, Front page, Insert, Inside back cover, Inside front cover, Table of contents
- » Page size: Full, Half-Page, Junior Page, Quarter Page
- » Pre-Forum
- » Publication rack
- » Save the date
- Products:
 - » Badge lanyard
 - » Badge ribbons
 - » Bag/backpack
 - » Chapstick
 - » Clothing
 - » Cups
 - » Cup sleeve
 - » Edible: Beverage, Breakfast, Candy, Dinner, Dessert, Lunch, Snack
 - » Fidget toy/stress ball
 - » Flash drive
 - » Flashlight
 - » Gift Bag
 - » Hand sanitizer
 - » Key changes
 - » Lotion
 - » Lapel pin
 - » Mug
 - » Napkins
 - » Notepad
 - » Pen
 - » Phone holder
 - » Presenter gift

Advertising, Exhibits, and Promotion

- Raffle item
- Raffle ticket
- Tissue
- Water bottle
- Welcome amenity
- Wet wipes

Commercial Support

Commercial support can include **monetary support** or **in-kind support** from ineligible companies, such as supplies (instruments, materials, non-biological items), equipment loaned for activities, services, human tissue, animal tissue, and facilities or space for training.

Some important tips regarding commercial support are listed below.

Education Activities

- Commercial supporters may not influence content, planning, or implementation of education.
- Food and beverages distributed during education can be paid for by commercial support funds.
- Printing costs, WiFi service, registration bags (without logos), audio/visual fees, medical equipment are examples of expenses that can be used if they are a part of the education. Grant support can be used to pay for faculty/staff expenses.
- Commercial support be used for a specific activity.

Disclosure to Learners

The accredited provider must disclose to the learners the name(s) of the ineligible company(ies) that gave the commercial support, and the nature of the support if it was in-kind, prior to the learners engaging in the education. Disclosure to learners of commercial support must not include the ineligible companies' corporate or product logos, trade names, or product group messages.

Commercial Support

In-Kind Support

- Request supplies (e.g., instruments, materials, non-biological items, loaner equipment).
- Research what vendors your clinicians have existing relationships with.
- Research what equipment your system or clinicians use.
- The incidental appearance of logos on equipment is not prohibited.
- If you receive in-kind support (e.g., equipment loan, disposable materials, facilities/space rental, etc.), the acknowledgments must specifically indicate the support type.

Exhibit Income

- Exhibit income is not considered commercial support because the exhibitor is sold booth space in exchange for money.
- Exhibit income is often used to help offset general costs related to an activity.
- Exhibit income does not require a Letter of Agreement.
- Payment and arrangements for exhibits must be separate business transactions and cannot be conditions for commercial support.
- Revenue received from exhibits must be recorded separately from revenue received from commercial support in the activity budget.
- Information about exhibits can appear in a program with commercial support disclosures if expectations for Standard 5 are met.

For more information, see ACCME's Standards Resources

<https://accme.org/standards-resources>

Eligible Company Donations

Organizations accredited to provide CE within the ACCME System abide by the Standards for Integrity and Independence of Accredited Continuing Education to ensure that CE (1) presents learners with only accurate, balanced, scientifically justified recommendations, and (2) learners are protected from promotion, marketing, and commercial bias.

Organizations eligible to be accredited in the ACCME System (**eligible organizations**⁷) are those whose mission and function are: (1) providing clinical services directly to patients; or (2) the education of healthcare professionals; or (3) serving as fiduciary to patients, the public, or population health; and other organizations that are not otherwise ineligible. Examples of such organizations include:

- Ambulatory procedure centers
- Blood banks
- Diagnostic labs that do not sell proprietary products
- Electronic health records companies
- Government or military agencies
- Group medical practices
- Health law firms
- Health profession membership organizations
- Hospitals or healthcare delivery systems
- Infusion centers
- Insurance or managed care companies
- Nursing homes
- Pharmacies that do not manufacture proprietary compounds
- Publishing or education companies
- Rehabilitation centers
- Schools of medicine or health science universities
- Software or game developers

7. Accreditation Council for Continuing Medical Education. (2023). Eligibility. <https://www.accme.org/accreditation-rules/standards-for-integrity-in-dependence-accredited-ce/eligibility>.

Eligible Company Donations

The Standards for Integrity and Independence do not address or set requirements regarding monetary or in-kind donations from eligible companies.

Resources

ACCME Academy (Selected curricula and courses on Standards for Integrity and Independence)

<https://academy.accme.org>

ACCME Compliance Library

<https://www.accme.org/resources/compliance-library>

ACCME Website FAQs

<https://www.accme.org/faq>

CE Educator's Toolkit (developed by SACME through an ACCME research grant)

<https://www.accme.org/ceeducatorstoolkit>

Standards for Integrity and Independence in Accredited Continuing Education

<https://accme.org/accreditation-rules/standards-for-integrity-independence-accredited-ce>

“Ask the Grantor” Series from the Alliance for Continuing Education in the Health Professions (ACEHP) Almanac. Published 2022.

- Part 1: Total Reach and Ensuring Compliance
<https://almanac.acehp.org/Leadership/Leadership-Article/ask-the-grantor-part-1-total-reach-and-ensuring-compliance>
- Part 2: The Value of IME Funding
<https://almanac.acehp.org/Leadership/Leadership-Article/ask-the-grantor-part-2-the-value-of-ime-funding>
- Part 3: The ‘Why’ Behind Providing Grants, RFPs, and More
<https://almanac.acehp.org/Leadership/Leadership-Article/ask-the-grantor-part-3-the-why-behind-providing-grants-rfps-and-more>
- Part 4: Impacting Patient Outcomes and Requesting Financial Support
<https://almanac.acehp.org/Leadership/Leadership-Article/ask-the-grantor-part-4-impacting-patient-outcomes-and-requesting-financial-support>

“The Needs Assessment in Continuing Medical Education” Nicola M.A. Parry. Medical Writing, V. 23, No. 2, (2014) pp. 125-128.

Appendix

In October 2023, a survey of funding practices was sent to the Society of Academic Continuing Medical Education (SACME) listserv. Key data points are highlighted below. Sixty-one responses were received from 49 medical schools; 8 hospital/health systems, 3 medical specialty societies; and 1 “other”.

- A. **Organizational financial support for CME/CE offices:** 49% partially funded, 28% fully funded; 23% fully self-supported
- B. Fifty-one percent do not return revenue to their organization and 49% do return revenue to their organization.
- C. **Sources of revenue**, in descending order, include (n=61):
 - a. Fees for services such as accreditation, program management, financial management, conference management for both internal and external partners
 - b. Registration and tuition fees
 - c. Exhibits, sponsorships, and product theaters
 - d. Grants from ineligible companies
 - e. Collaboration fees with educational partners
 - f. Grants from foundations
 - g. Grants from state and/or federal government sources
 - h. Donations
 - i. Subscription fees
 - j. Other – institutional support, application fees, qualitative data collection and analysis services

Appendix

- D. **Types of service fees charged to departments and partners**, in descending order include (n=59):
- a. Accreditation fees
 - b. Commercial support grant management (e.g. application submission, tracking)
 - c. Logistics management
 - d. Program management
 - e. Financial management
 - f. Marketing/promotion fees
 - g. Other
- E. What is the **percentage of revenue you charge** (n=16)?
- a. 1-5% (6)
 - b. 6-10% (2)
 - c. 11-15% (4)
 - d. >15% (1)
 - e. Other (3) - \$1500 or 20% of overall expenses, whichever is greater; 20%
- F. Do you accredit **regularly scheduled series (RSS)** (e.g. grand rounds, case conferences, tumor boards, M&M) (n=59)?
- a. Yes (55)
 - b. No (4)
- G. Please indicate **how much you charge per series**. Check all that apply if the frequency of session necessitates multiple categories. (n=40)
- a. Up to \$500 annually (9)
 - b. \$501 - \$1000 annually (13)
 - c. \$1001 - \$1500 (15)
 - d. \$1501 - \$2000 (14)
 - e. \$2001 - \$2500 (10)
 - f. >\$2500 (10)

Appendix

- H. Do you charge extra for **more than one accreditation** (e.g., CME plus CNE or CPE) (n=31)?
 - a. Yes (16)
 - b. No (15)
- I. Do you charge extra for offering **Maintenance of Certification (MOC)** Part 11 credit (n=28)?
 - a. Yes (19)
 - b. No (9)
- J. Do you have a **per credit registration/tuition fee** (n=57)?
 - a. Yes (46)
 - b. No (11)
- K. What is your current **per credit registration fee** (n=11)?
 - a. <\$10 (1)
 - b. \$10 - \$19 (2)
 - c. \$20 - \$29 (5)
 - d. \$30 - \$39 (3)