

COURSE DIRECTOR ORIENTATION

PURPOSE: This packet has been prepared by the MDS Secretariat and approved by the MDS Education Committee and the Regional Education Chairs to provide a Course Director with a high level overview of the responsibilities of accepting the position of Course Director. The responsibilities listed do not include every decision that needs to be made. The Course Director may volunteer to host a course in his/her locale or respond to a request by the Regional Educational Chair to host a course.

TRAVEL WARNING to consider: Per MDS policy, an in person course may not be held in a location where there is a current travel warning from the United States State Department.

<https://travel.state.gov/content/passports/en/alertswarnings.html>

COURSE TIMELINE

This timeline represents the critical points for moving through the planning, implementation and post course deliverables.

Orange highlight indicates responsibilities of Course Director

TIMELINE (Prior to course start)	ACTION	RESPONSIBILITY
9-12 months	Identify Course Director (1-2 per course)	Regional Education Chair/ Course Director
	Schedule Course Director orientation	MDS Program Manager
	Determine course date, location and venue	Course Director
	Create course proposal using current MDS documents: <ul style="list-style-type: none"> • Agenda – Keep in mind the guidelines for number of faculty for a course • Budget • Learning Objectives • Marketing Targets (institutions, organizations, groups) • Funding Targets (local supporters – institutions, organizations, or industry; and global support companies) • Use correct proposal form for CME, non-CME or Allied Health Courses 	Course Director with MDS Program Managers
	Create Development Plan and propose funding	MDS Director of Development
	Become familiar with Funding Policy	Course Director
8 months	Review and approve course proposal, budget, agenda & Development Plan	Regional Education Chair/s Regional Education Committee Regional Executive Committee

	keeping in mind the Guidelines given to the Committees.	
7 months	Review and approve course proposal, including agenda	MDS Education Chairs MDS Education Committee
	Develop marketing plans & branding; incorporate any suggestions from Course Director from the proposal	MDS Marketing
	Send out funding requests	MDS Director of Development (Can happen as soon as region approves proposal)
4 - 5 months	Schedule telephone call with Course Director, Development Director & MDS Program Manager	MDS Program Manager
	Review budget and allocate additional funds as needed.	MDS Director of Development; MDS Program Manager; Course Director
4 months	Formally invite faculty; open registration (within one month of course being approved)	MDS Program Manager
3 months	Faculty Management <ul style="list-style-type: none"> Oversee faculty organization to ensure presentations are relevant, timely and do not overlap Communicate with faculty regarding their topics and presentation content 	Course Director
2 months	Assist with final arrangements within the institution, including room rental reservations, Audio/Visual equipment and catering arrangements, as needed. <ul style="list-style-type: none"> MDS signs all contracts and arranges all payments 	Course Director MDS Program Manager
Course Date(s)	Manage time to ensure lectures begin and end on time.	Course Director MDS Program Manager
	Facilitate audience questions and discussion	
Post Course	Complete Budget Reconciliation & Course Report	MDS Program Manager Course Director
	Receive and review course evaluations	Course Director
	Schedule time for a course debrief meeting	Course Director MDS Program Manager

COURSE PROPOSAL

A course proposal form, shared by the MDS Secretariat, must be completed for all MDS educational programs. The course proposal provides the information necessary for review and approval of the program. This form includes the following required appendices: program schedule, program budget, and brief CV of course director(s). An MDS Program Manager will work with the Course Director to complete the proposal form.

Course Proposal Form

The course proposal form includes basic information on the program (faculty, audience, course format, and program description), budget, and the educational needs assessment and professional practice gaps.

The recommendation is to start the course proposal a **MINIMUM** of 9-12 months before the date of the Course.

Attachment 1: Budget

REGISTRATION FEES:

- Registration fee information can be provided, if available from other similar courses
- Different registration classifications: non-member, member, junior/waived dues members
- Registration fees should, at minimum, cover the cost per participant for course materials and catering

COMMERCIAL SUPPORT: The Course Director is required to involve the MDS Director of Development to create the Letters of Agreement (LOAs) and ensure the deliverables are appropriate for the support level. Any in-kind support also needs a completed form for audit purposes.

HONORARIUM: All faculty who are responsible for a presentation are expected to be given some remuneration. Any on-site students or junior faculty who help with live or video case presentations involving patients but are not course faculty per se can be invited to attend the course sessions as remuneration for their volunteer time but are not expected to receive an honorarium.

TRAVEL: MDS has a travel reimbursement policy that indicates:

- All expenses for travel will be reimbursed in US dollars
- Round trip business class airfare can be eligible for reimbursement for all Officers travel, for transoceanic flights and/or flights over six hours, provided through the official MDS travel agency or through a member's own agency.

REGIONAL EDUCATION FUND POLICY: The MDS Officers have designated an amount of money for each region to use if attempts at commercial funding fall short of projected plan in budget. The use of this money must be requested and approved by the Regional Executive Committee. Any travel grant requests need to be included in the budget.

MDS SECRETARIAT FEES: MDS is a professional association, which has asked EDI (Executive Director, Inc.) to provide management services for the Society. The MDS Officers approve a management fee to EDI with the approval of the yearly budget. As part of the management fee, EDI employs staff for MDS, which is referred to as the International Secretariat. The MDS Officers have requested that the management fees are included in individual course budgets, so that course directors and the regions are aware of the internal costs to run education programs. In addition, including these fees in the course budgets allows for course sponsorship/funding to cover some of these costs.

The fees are allocated for:

- Marketing (all the branding, email blasts, membership emails, program design, etc)
- Meeting logistics (time spent contracting for venue, business logic, catering, transportation, applications/registrations of participants, translation, airfare for course director and faculty, all communications with vendors, budget reconciliation, etc.)
- Content development coordination (time spent creating course proposal, communication calls with course director, program, budget, faculty invitations, honoraria distribution, expense reimbursements, etc.)
- Fund development (time Development spends raising commercial support)
- CME/CPD Credits (Time spent working on ACCME or EACCME accreditation)

If no fund development is needed or no CME/CPD credits will be granted, these fees are typically eliminated from budget. The Program Manager for the course will review the management fees with the Course Director when creating the budget for course. Some courses may require higher fees, however, typically \$3,000 is budgeted for each item. Fees are applied to the course budgets and regional budgets at the end of the year, based on the amount of work each course required.

Attachment 2: Program Agenda

A program agenda template is included as part of the course proposal form. The course agenda (program) will be finalized at time of approval.

TOPIC SUGGESTIONS

In planning the program, the Course Director identifies what topics should be part of the course and the sequence in which the topics should be presented. It is important to start with basic or foundational lectures before moving to specific and more advanced topics. The Regional education chairs and committees can serve as resources for topic developments so that course topics are in line with educational needs and strategic planning

FORMAT

According to the results of a bi-annual Education Needs Assessment, MDS members are looking for opportunities for live interaction with faculty. The methods to use for the course presentation could be: lecture, case discussion, patient practicum, panel discussion, workshops, demonstrations/simulation, online/self-guided, and question/answer period. The use of the

Virtual Professor Program also provides for interaction among presenter and audience. Any opportunity to provide interaction would be beneficial to the learners.

FACULTY SELECTION

Faculty should be selected from the Course Director's institution or other nearby institutions in addition to other experts from within the regional section. Consideration for faculty selection should include diversity among the speakers. If there is a need for experience from outside the region, consider using the Virtual Professor Program. The Course Director will need to explain within the course proposal the reason for his/her choice of each faculty member. The MDS Education Committee recommends that each faculty member, including the course director(s) be asked to prepare a minimum of two lectures (or lecture and video session; or lecture and panel) to limit the total number of faculty needed for a course. The approval Committees will be taking into consideration the number of faculty.

"With regards to the number of faculty, it is important to carefully consider that faculty travel time is well used, that the attendees have sufficient exposure to each faculty member, and that costs are responsibly allocated. In general, it is recommended that each faculty member, including the course director(s) be asked to prepare a minimum of two sessions (i.e. a combination of 2 lectures, lecture and small group session or tutorial, video session, etc.) per course, generally translating to at least 1 hour of direct teaching time (and in many/most cases, faculty will provide more teaching time than this). This implies that, for example, in a typical 2-day course with 16 hours of teaching, there would be a maximum of 16 faculty. Such a typical course would have 1-2 course directors. It is recognized that not all courses are structured alike, and that in some cases, more course directors and/or faculty might be needed. If this is the case, please provide specific justification for why this number of course directors or faculty are required."

It is further recommended to invite faculty from the same region (to minimize travel costs and time), when appropriate but also with considerations of faculty diversity. Moreover, course directors are encouraged to consider having some lectures to be provided remotely, by using the Virtual Professor technique."

Attachment 3 – The Course Director(s) needs to provide a brief CV in English.

COURSE PROPOSAL REVIEW PROCESS

Each course proposal needs to reach the MDS Education Committee no later than 7 months prior to course in order to receive approval. This timeline allows enough time to fundraise and market the course after its approval, and thus ensure its success. The MDS Regional Program Manager will send the course proposal for review and approval to the following:

1. MDS Regional Education Chair
2. MDS Regional Education Committee
3. MDS Regional Executive Committee

4. MDS Education Chairs
5. MDS Education Committee

A quorum (half of the number of committee members, plus one) needs to be reached on each committee level, before a course proposal can be moved to the next committee level. The MDS Regional Program Manager will inform the Course Director after the course has been approved and is ready for implementation.

After approval,

1. A marketing plan will be implemented
2. Fundraising for the course will begin
3. Registration will begin within one month of course being approved

Course Director Responsibility during Review Process

The Course Director's responsibility during the review process will be as follows:

- Be available to answer any questions about the course that may arise by committee members during the review process
- With the help of the MDS Secretariat, make any needed adjustments to the course proposal or budget as a result of these questions/suggestions

AWARDING CME CREDIT FOR A COURSE

Planning

The Course Director works with the MDS Program Manager to discover learner's needs, educational gaps, learning objectives. The Course Director selects speakers and verifies their competency in the subject area. They may also choose to have a speaker present using the Virtual Professor Program (web conferencing).

During Activity

The Course Director shares the responsibility of the MDS Program Manager to ensure that there is no marketing or sales activity in the room where the education is being offered. In the event a speaker should begin to promote a single product or commercial service the Course Director has the responsibility to focus and facilitate discussion that includes recommendations from multiple and balanced sources, uses generic names (when applicable) and cites evidence based medicine.

Requesting CME Credit

The course proposal form includes requests for CME credits. The MDS Program Manager will complete additional forms as needed for accreditation. If requesting EACCME (European credit), the MDS Program Manager requests the Course Director's physician license number as they are recognized as the major planner of the event. The application is sent to UEMS a

minimum of fourteen weeks before the course date. For ACCME (USA) credit, disclosures for all faculty are sent to the CME Committee 60 days before the course date or the course cannot offer credits.

Audience Information

The disclosure of commercial support (without logos) and all those who had control of content needs to be disclosed to the learners before the activity. The MDS Secretariat manages all this information.

SPONSORSHIP SUPPORT

The Director of Development collaborates with the Course Director to secure and document corporate funding for courses. In addition to ensuring that all sponsorship benefits are delivered, this process is designed to ensure that sponsorship opportunities are consistent for all courses. Funding can be awarded by a company's global headquarters and/or from a regional (or national) office. Our experience has been that approximately 20% of funding is identified by course directors and 80% from previous leadership and Secretariat relationships. This can vary based on the course and location.

Potential Limitations of Corporate Support

Pharmaceutical and medical device companies are increasingly limited by government regulations and industry associations to supporting programs which are held at appropriate venues or limit expenses related to hotels, meals, etc. If applicable, course directors are reminded to propose venues and expenses which comply with organizations. Your Program Manager can make you aware of any specific things that you need to be aware of.

Please contact the Director of Development if you have questions about potential compliance issues related to the funding sources which may be sought.

Types of Corporate Support for Courses

Pharmaceutical and medical device companies can support courses through various departments. The application method and benefits provided in return can vary:

1. Unrestricted medical education grants are the most common form of support and usually require a formal application to a medical affairs department. No benefit, other than acknowledgement of the grant, can be provided to the company in return.
2. Commercial support is designed to provide a direct benefit, such as an exhibit or advertisement in return for their support. Application is made to the marketing department.
3. Supporting physicians or health care professionals to attend the course. This can include registration and/or transportation and accommodations. In this case, they register and pay for the supported participants.

4. In some countries, it is common for local pharmaceutical representatives to provide support for a course meal or faculty dinner. This is typically arranged locally between the Course Director and company representative. It is important to share all this information with the Secretariat.

Process of Securing Sponsorship Support

1. Early in the course development process, the MDS Regional Program Manager informs the Director of Development that the course is being developed. The staff liaison will either forward funding related information received from the Course Director, or encourage the Director of Development and Course Director to discuss any funding interest expressed by corporate sources and if any special sponsor benefits will be offered, including a corporate symposium, distribution of marketing materials, or recognition for sponsoring a meal.
2. The Director of Development reviews the Development Section of the course proposal, adds potential sponsors and approves the sponsorship goal.
3. The Director of Development uses the course proposal to create a course sponsorship prospectus which is circulated to the potential companies. Content from the prospectus is also used to complete online grant applications.
4. The Course Director forwards any interest in supporting the course expressed by local companies to the Director of Development to secure documentation required by the Society's auditors and CME accreditors.
5. The Director of Development informs the Course Director and the MDS Program Manager as funding is committed, secures the Letter of Agreement and sends an invoice for payment. The Course Director will approve any offers of support at levels different than requested, or if a sponsor benefit not offered is requested.
6. The Director of Development notifies the Course Director when funding is approved or declined.

MARKETING SUPPORT

Marketing Plan

All marketing for courses is done by the MDS Secretariat. Once a course is approved by the MDS Education Committee, the marketing team will submit a marketing plan with timeline to the MDS Program Manager. The MDS Program Manager will share this marketing timeline with the Course Director.

Social Media

As social media has become a standard marketing avenue for the Society, all marketing plans for courses will include social media posts in conjunction with scheduled email campaigns. There is also the option to include paid campaigns, which would need to be accounted for in the budget.

Additionally, if course directors have personal social media handles that they would like used in marketing, those should be shared in the course proposal.

Marketing Timeline

The timeline for marketing courses is created with great attention to the timeline of the course, but also where the course falls in the calendar year in relationship to other courses. MDS maintains a detailed calendar of all communications sent to members and is sensitive to the amount of communications sent on a daily and weekly basis.

Mailing Lists/Target Audience

The Course Director/s should support marketing efforts. This can be done in the following ways:

- Provide a list of email addresses of personal contacts for inclusion in marketing.
- Provide guidance and direction regarding relevant organizations outside of MDS. It is important to keep in mind that some of these organizations require payment for use of their member lists and that would need to be listed within the course proposal for budgeting purposes.
- The MDS Secretariat marketing team can research other relevant contacts that are a natural fit for course promotion, but this does require extra time to gather and would require clear direction from the course director on where to find these groups.

ON-SITE AND POST- COURSE RESPONSIBILITIES

On-site responsibilities of Course Director

Pre-Course

- It is necessary to adhere to deadlines regarding finalizing the program, logistics and course details with the Secretariat in a timely manner for communication with all faculty and participants.
- Meet with the MDS Program Manager the day before the course (schedule the date/time/place before arrival on-site) to walk through the event space, determine last minute logistics, and review the program.

Duration of course

- Be present and available throughout the course
- Encourage and promote MDS Associate Membership, and other MDS programs
- Encourage participants to ensure all contact information, especially email address, is correct
- The evaluation is considered part of the course. Ensure that all participants complete the evaluation either online or on hard copy.

Post-Course responsibilities of Course Director

- Approve “Thank You Letters” to faculty and participants
- Review the post course evaluation results which is then sent to faculty

- Review and approve the Executive Summary Report by the MDS Program Manager. The Course Director adds his/her perspective of the course within this summary. Once approved it is shared with the MDS Education Committee.
- Review and approve the reconciled budget
- Review and approve the course report for the MDS webpage and *Moving Along*. The Course Director can add personal perspectives of the course and photos (if available).

VIRTUAL PROFESSOR PROGRAM

The Virtual Professor Program is a web-conferencing program that can be used with an in-person course to invite international faculty to present a topic without incurring the expense or time commitment of travel. The Education Committee requests that this be highly considered for at least one faculty member from a distance.

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