GUIDELINES
for Submission of Applications
for Approval of
Continuing Nursing Education Activities through the
SGNA Approver Unit

SGNA

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Appendices

**Guidelines for Submission of Applications
for Approval of Continuing Nursing Education (CNE) Activities
through the SGNA Approver Unit**

These Guidelines have been developed to assist SGNA Approver Unit applicants in developing educational activities for nursing contact hours. Applicants are strongly encouraged to review each section of the Guidelines to gain a deeper understanding of the approval process.

I. Introduction

Since its inception, the Society of Gastroenterology Nurses and Associates, Inc. (SGNA) has been dedicated to the competence of individuals who are working in the specialty area of gastroenterology and endoscopy nursing practice. Participation in continuing education activities is one way nurses and associates can maintain their competence.

Continuing education activities that maintain and improve competence are based upon the principles of adult learning. Principles of adult learning include:
   a. the learner experiences a need to learn;
   b. the learning environment is characterized by physical comfort, mutual trust, respect and helpfulness, freedom of expression, and acceptance of differences;
   c. the learner perceives the goals of a learning experience to be compatible with his/her own learning goals;
   d. the learner accepts mutual responsibility for planning, implementing and evaluating the learning experience, and therefore is committed to learning;
   e. the learner participates actively in the learning process;
   f. the learning process relates to and uses experiences of the learner as a basis for teaching new knowledge and skills; and
   g. the learner has a sense of progress toward achievement of his/her goals.

Continuing nursing education (CNE) builds on various educational and experiential bases in order to enhance nursing practice, education, research, and theory development. Ultimately, continuing education in nursing will help maintain and improve the health of the public.

SGNA conducts an approval process for continuing education in nursing activities under the auspices of the American Nurses Credentialing Center's (ANCC) Commission on Accreditation. SGNA's approval process must adhere to the criteria and standards published by ANCC.

The purpose of the information contained in this manual is to assist SGNA Regional Societies or other providers of continuing education activities to design educational activities that will meet quality standards and are eligible for contact hour approval through the SGNA Approver Unit, which is accredited by ANCC.

II. Approver Unit

A. Philosophy

Based on the mission and purpose statement of the Society of Gastroenterology Nurses and Associates, Inc. (SGNA), the philosophy of the Approver Unit is predicated on the belief that nursing is the art and science of care of the patient and family through scholarly practice provided by professional practitioners.

Further, these professional practitioners are adult learners who have primary responsibility for the development and maintenance of their nursing expertise. The individual nurse is further responsible for identifying his/her own learning needs and taking the initiative to meet those needs. Particularly in view of the current emphasis on health care reform, the individual nurse must accept and act upon his/her responsibility to remain current in his/her specialty practice.

To meet nurses' learning needs and, as a result, improve patient care, it is essential that educational opportunities for the specialty area of gastroenterology and endoscopy nursing practice exist. These educational activities should be designed to assist nurses to acquire new knowledge, skills and behaviors in view of advancing technologies, changing health care delivery systems, expanding nursing roles, and the outcomes of nursing research.

Through its Approver Unit, SGNA assures quality educational activities for its members and constituents.

Through a peer review process, the Approver Unit of the SGNA reviews and approves those educational activities related to gastroenterology and/or endoscopy that are designed to assist nurses to increase their knowledge, understanding and skill in order to improve patient care and promote professional development through the application of adult education concepts.

B. Purpose

The purpose of the Approver Unit of SGNA is to improve the quality of gastroenterology and endoscopy nursing practice through the approval of educational activities that both prepare nurses for this specialty area and serve to maintain nurses' knowledge and skills in the area of practice.

C. Goals

The goals of the Approver Unit of SGNA are to:
1. Approve, through a peer review process, educational activities that meet the American Nurses Credentialing Center's Commission on Accreditation criteria.
2. Encourage SGNA Regional Societies and other providers to submit for approval those education activities that meet nurses' learning needs and have as a desired outcome improvement in gastroenterology and endoscopy nursing practice.

D. The Continuing Education Peer Review Group (CEPRG)

The volunteer body within the SGNA Approver Unit is the Continuing Education Peer Review Group (CEPRG). Members of the CEPRG review applications and make decisions based on established criteria, using rating forms specific to the type of educational activity: Provider Directed or Learner Directed. The CEPRG uses the criteria established by the ANCC Commission on Accreditation in its review of applications. The CEPRG is autonomous in making decisions on applications in the approval process.

The CEPRG recommends policies and procedures related to the approval process to the SGNA Board of Directors for approval. The CEPRG is responsible for reviewing applications for contact hour approval of nursing continuing education activities submitted by SGNA Regional Societies and other providers, refining policies and procedures related to the approval process, and evaluating the overall approval mechanism.

E. CEPRG Composition

The CEPRG is composed of at least eight members, all of whom are members of SGNA. All are registered nurses with knowledge and experience related to nursing education and have a baccalaureate or higher degree in nursing. Past involvement with an application for contact hour approval according to ANCC Commission on Accreditation criteria is preferred.

III. Application Process

Providers of continuing education in nursing activities that are eligible to use SGNA's approval process are SGNA Regional Societies and other non-profit providers whose subject matter is related to gastroenterology, gastroenterology nursing and/or endoscopy.

SGNA provides assistance with the approval process to applicants. If assistance is requested in designing the educational activity or in completing application forms, please call SGNA Headquarters at 800.245.7462. Appendices A-D in this manual also contains information that may be useful in the design and submission of educational activity approval applications.

Applications are to be submitted online.

A. Preparing the Application

The provider prepares an application for contact hour approval of a continuing nursing education activity using the appropriate forms contained in these guidelines. The application requests demographic data about the educational activity provider and specific information about the educational activity. The information provided

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on the form should be comprehensive. The application forms are specific to each type of continuing education activity.

PROVIDER DIRECTED ACTIVITY: A <u>Provider Directed</u> activity is one in which the provider controls all aspects of learning. The provider determines the learning objectives based on needs assessments, content of the learning activity, the method by which it is presented and evaluation methods. Contact hour credit awarded is based on the time allocated for the activity. Examples of Provider Directed activities include but are not limited to conventions, courses, seminars, workshops, lecture series, and distance learning activities such as webinars. It is possible for an activity that is "learner-paced" to be provider directed. An example of this would be a continuing education activity presented as a journal article. Knowledge and use of adult learning principles should be reflected in all aspects of the educational design, e.g., objectives, content, teaching methods, physical facilities.

LEARNER DIRECTED ACTIVITY: A <u>Learner Directed</u> activity is designed for completion by learners, independently, at the learner's own pace and at a time of the learner's choice. The Learner determines his/her learning needs, formulates learning goals, identifies human and material resources for learning, chooses and implements appropriate learning strategies, and evaluating learning outcomes. Learning –directed activities may be developed with or without the help of others but they are engaged in by only one individual.

Applications must be submitted electronically and received by SGNA Headquarters at least 42 days (6 full weeks) prior to the scheduled date of the educational activity.

NOTE that applications received less than 42 days prior to scheduled activity will not be accepted for review. Processing applications takes several weeks and possibly longer if additional documentation is needed. The application should be completed well in advance of the scheduled date of the continuing education activity. Retroactive approval is not given. All applications must be reviewed and acted upon before the date of the activity.

Each criterion identified in the application must be addressed. All required documents and fees must be submitted as per application requirements. Receipt of applications will be acknowledged via email.

B. *Fees/Refunds*

Fees for review of contact hour applications are based on the date the application is submitted online and whether or not the application is for an SGNA Regional Society or another non-profit provider.

Only programs provided by SGNA Regional Societies will receive the discount. Programs are considered to be provided by an SGNA regional Society if they are:
a. Primarily for the benefit of SGNA regional members
b. Applicable to SGNA's regional society requirement of providing at least six contact hours for re-chartering

Fee Structure			Discounted fees for SGNA Regional Societies only	
Application received prior to activity date:	60+ days	42-59 days	60+ days	42-59 days
0.5 to 1.0 contact hour	$60	$120	$30	$50
1.1 to 5.0 contact hours	$155	$295	$75	$140
5.1 to 10.0 contact hours	$225	$435	$110	$200
>10.1 contact hours	$295	$575	$140	$260

Effective January 1, 2014

NOTE: No application will be accepted for review less than 42 days (6 weeks) prior to the date of the activity.

<u>Refunds</u>: If the application is withdrawn prior to action by the CEPRG, one-half the fee is refunded. If the

application is withdrawn after action by the CEPRG, no fees are refunded. No fees are refunded if the provider cancels an activity. The full fee is refunded to ineligible applicants.

C. *Review Process*
Three members of the CEPRG independently review each application. A simple majority forms the basis of the decision to approve the application. Conflict in reviews is handled through a conference call of the CEPRG. If additional information is required before an approval decision can be made, the applicant will be notified.

D. *Types of Action*
Applications may be:
1. Approved
2. Approved pending submission of additional information
3. Not approved

Applicants will be notified of the CEPRG's action on their application within five business days of the date of the action. This communication will include, when applicable, the following information:
1. The action of the CEPRG
2. The appropriate approval terminology to be used on all written materials related to approved educational activities
3. The appeal process

Approval of activities is valid for two years from the date of final approval; an activity may be repeated as originally approved multiple times within that period without payment of additional fees. **However, the provider must notify the Approver Unit if there is a change in faculty for the activity, and submit a Biographical Data/Conflict of Interest form for that person.**

A Post Activity report including a list of participants, sample certificate, and evaluation summary must be submitted each time the activity is presented. **Changes to content will require application as a new program.**

E. *Withdrawal of Applications*
The applicant has the right to withdraw any application without prejudice to any future applications prior to action being taken by the CEPRG.
1. Notice of withdrawal must be received in writing at SGNA Headquarters.
2. One-half the application fee will be refunded. All other documents and/or copies will be returned to the applicant if still at SGNA Headquarters

F. *Re-submission of an Application*
Any application that has been withdrawn prior to review and action can be resubmitted without prejudice. The application fee must be paid in full for a resubmitted application.

G. *Appeal of a Decision*
A provider that is dissatisfied with the action taken on an application may appeal the decision of the CEPRG. The request for an appeal must be submitted in writing to SGNA Headquarters no more than sixty days after the date of the action. The SGNA Executive Committee shall consider the appeal on a conference call scheduled as soon as possible following the receipt of the notice of intention to appeal. The Associate Executive Director of Clinical Affairs and the Board of Directors liaison to the CEPRG shall be in attendance on the conference call to answer questions and clarify concerns, but shall not be part of the decision-making process.

The Associate Executive Director of Clinical Affairs, who serves as the lead nurse planner, shall communicate action taken by the SGNA Executive Committee to the provider. Action by the SGNA Executive Committee on the appeal is considered final.

H. *Revocation of Approval*
Providers of approved activities that do not comply with the criteria set forth by the Approver Unit may be

subject to revocation of approval of an activity. Revocation action shall be communicated in writing (return receipt requested) to the Regional Society President or contact person designated by the provider. Any mention of approval of the educational activity then must be removed from promotional and other materials (e.g., certificates of attendance) related to the educational activity after the date the notice of revocation was received.

I. Record Confidentiality and Keeping

All records, files and applications related to the approval process are considered confidential.   Only those individuals involved with the approval process have access to records, files and applications. Records should be maintained for six years.

J. Use of Appropriate Language

Providers whose educational activities are approved by the SGNA Approver Unit shall be required to use appropriate approval terminology on all communications related to the approved educational activities (including marketing materials and certificates of attendance). Educational activities approved by SGNA shall carry the following statement. This statement will appear separate and distinct from any other statements.

"This continuing nursing education activity was approved by the Society of Gastroenterology Nurses and Associates, Inc. an accredited approver by the American Nurses Credentialing Center's Commission on Accreditation".

NOTE: The number of contact hours is indicated in a separate sentence.

In the event promotional materials for an educational activity are distributed before approval has been received, the following statement must be used**.** This statement will appear separate and distinct from any other statements.

"This educational activity has been submitted to the Society of Gastroenterology Nurses and Associates, Inc. for approval. The Society of Gastroenterology Nurses and Associates, Inc. is accredited as an approver of continuing nursing education by the American Nurses Credentialing Center's Commission on Accreditation."

K. Calculation of Contact Hours

A contact hour is 60 minutes of an approved, organized learning experience, or 60 minutes of planned, supervised clinical practice that is designed to meet educational objectives. Included in the calculation of contact hours is time for tests, questions & answers, and evaluation.

Calculation of contact hours includes those portions of the educational activity devoted to the learning activity and time spent evaluating the activity. It is exclusive of time spent for meals, breaks, and membership activities.

Contact hours may be awarded in portions. For example, 120 minutes of learning activity equals 2.0 contact hours or a learning activity that consists of 30 minutes equals 0.5 contact hours. Contact hours may be awarded in the hundredths, (e.g. 1.66 contact hours) two digits past the decimal point or rounded down (e.g. 1.6 contact hours) but not rounded up. For example, 90 minutes of instruction equals 1.5 contact hours.

L. Joint-providership

Joint-providership is a joint endeavor between two or more providers, agencies, organizations or institutions for the purpose of offering a continuing education activity. Appropriate agencies include hospitals and health service settings, educational institutes, government agencies, or other nursing and professional organizations. **Commercial interest organizations are not allowed to serve as joint-providers.** Joint-providership includes determination of objectives and content, selection of presenters, awarding of contact hours, budget, record keeping, evaluation, and management of commercial support and sponsorship. Contracting with an institution for specific services such as clerical help, room rental and audiovisual equipment is not considered joint-providership.

M. Conflict of interest

The potential for conflict of interest exists when an individual has the ability to control or influence the

content of an educational activity and has a financial relationship with a commercial interest (see definition below), the products or services of which are pertinent to the content of the educational activity.

Additional information regarding content integrity may be found on the ANCC website: www.nursecredentialing.org and in the American Nurses Credentialing Center's Content Integrity Standards for Industry Support in Continuing Nursing Educational Activities which can be accessed via the link http://www.nursecredentialing.org/Accreditation/ResourcesServices

The Nurse Planner is responsible for evaluating the presence or absence of conflicts of interest and resolving any identified or potential conflicts of interest during the planning and implementation phases of an educational activity. If the Nurse Planner has an actual or potential conflict of interest, he or she must recuse him/herself from the role of nurse planner for the educational activity. Identification of conflicts of interest and the resolution thereof is identified on the SGNA Biographical data/Conflict of Interest form. CEPRG members who have a conflict of interest when reviewing an application must declare such interests.

N. *Commercial Interest*

A commercial interest is any entity either producing, marketing, reselling, or distributing healthcare goods or services consumed by or used on patients or an entity that is owned or controlled by an entity that produces, markets, resells or distributes healthcare goods or services consumed by or used on patients (2013 ANCC Primary Accreditation Application Manual for Providers and Approvers, 2011). Nonprofit or government organizations, non-healthcare-related companies, and healthcare facilities are not considered commercial interests.

O. *Commercial Support or Sponsorship*

The American Nurses Credentialing Center (2011) defines **commercial support** as "financial or in-kind contributions given by a commercial interest that are used to pay for all or part of the costs of a continuing nursing activity (CNE)". Providers of commercial support may not be providers or joint-providers of an educational activity.

Sponsorship refers to any "financial or in-kind contribution that does not fit the category of a commercial interest". The ANCC requires that a written agreement between the commercial interest or sponsor and the individual activity applicant be in place in order to ensure content integrity of the program.

The SGNA Commercial Support and Sponsorship Agreements meet this requirement. The appropriate agreement must be completed for all continuing nursing activities receiving commercial support or sponsorship.

a. **Financial Support**

Financial support is money supplied by a commercial interest to be used by a Provider for expenses related to the educational activity. Financial support may be provided as an unrestricted grant, educational grant, donation or scholarship (American Nurses Credentialing Center, 2011).

b. **In-Kind Support**

In-kind support is materials, space or other non-monetary resources or services used by a Provider to conduct an educational activity. It may include and is not limited to human resources, marketing services, physical space, equipment such as audio-visual materials and teaching tools (for example anatomic models). In-kind donations may not bear the trade names, logos or other identifying insignia of the commercial interest organization. In the event that the trade name, logos or other identifying insignia cannot be removed, the Provider must ensure that learners are aware of similar products produced by other companies. In addition, disclosure of the in-kind donation and a disclaimer of no endorsement by the Provider, SGNA or ANCC must be provided to all learners (American Nurses Credentialing Center, 2011). In the event that any form of commercial support is provided for an education activity, the provider will maintain in control of the educational content and disclose to the learners all financial relationships or lack thereof, between the commercial supporter and the provider or presenters.

P. Disclosure

Providers of CNE must provide the required disclosures to learners. Learners must receive disclosure of the required items prior to the start of the educational activity. Required disclosures may not occur or be located at the end of an educational activity. **Disclosures are made in writing and verbally.**

A list of required disclosures can be found on the **SGNA Required Disclosures to Participants** document and include:
1. Successful Completion of this Continuing Nursing Education (CNE) Activity
2. Conflict of Interest
3. Accreditation /Approval Statement
4. Commercial Support or Sponsorship
5. Expiration of enduring materials

Q.   Marketing Materials

Marketing materials help to promote the CNE Activity. All marketing materials should be professional in appearance and may include flyers, brochures, handouts, emails, etc. A list of required elements can be found on the **SGNA Marketing Form for CNE Activity** template and include:

1. Title of Program
2. Presenter(s) Name and Credentials
3. Date and Time
4. Location of activity
5. Provider of CNE Activity (e.g., region, hospital)
6. Contact Person's Name and Phone Number
7. Contact Hours requested, Contact Hours Pending
8. If there is Commercial Support or Sponsorship, the following statement should appear on the marketing material,
   "**There is commercial support or sponsorship for this program provided by** (*name of commercial interest or sponsor*) **provided in the form of _____ "**

R. Post Continuing Education Activity Reports
Within thirty days following the conclusion of the educational activity, each provider must submit a Post-Activity Report to SGNA Headquarters. The report must include the following:

1. Typed list of participants, including total number of participants
2. Signed copy of the certificate of completion
3. Summary of program evaluations

The following information is provided to assist providers with design of educational activities and completion of the application for contact hour approval. Appendix C- Bibliography lists additional references that may be helpful.

SGNA provides consultation to applicants regarding the approval process. If assistance is needed in designing the educational activity or completing application forms, please call SGNA Headquarters at 800.245.7462.

A. *Planning the Educational Activity*

Planning an educational activity should involve a registered nurse with a baccalaureate or higher degree in nursing who is administratively responsible for the actual planning, development, implementation, and evaluation of the continuing education activity. In addition, the planning committee must include at least one other member who has relevant content expertise.

Needs assessment is the initial step in the continuing education planning process. This must be done for every educational activity. There are questions on the Approver Unit application which address this. The process of needs assessment is identifying discrepancies (gaps) between what is known and/or practiced and what should be known and/or practiced. Gaps can be in the areas of knowledge (what one knows), in skills (what one knows how to do), and in practice (what one shows and does). Needs can be defined by the learner, the employer, the nursing profession, or society.

The following are commonly used methods for assessing the learning needs of adults:
1. The **questionnaire** is the most common method for gathering data on learning needs. To be effective, the questionnaire items should not merely comprise a "wish list" of topics, but should encourage the learner to identify learning needs based on competencies needed in a particular area of practice.
   a. One form of questionnaire often used collects information from attendees at a related educational activity. Participants may be asked (e.g., on the evaluation form) to indicate areas of their practice about which they need more information, or to identify troublesome procedures or issues they would like addressed in an educational activity.
2. The **interview**, used alone or in conjunction with other methods, can provide valid and reliable data on learning needs. Select a sample of learners that is representative of the target population. Ask them to identify their learning needs and those of their colleagues; then validate the data gathered with the learners' supervisors.
3. **Observation** is another method of needs assessment. This method is especially useful in clinical practice settings.
4. **Group discussion** is helpful in identifying and/or validating adult learning needs. A facilitator in the group focuses discussion and documents the outcomes of the discussion.
5. **Advisory committees** are used to help assess ascribed learning needs of groups they represent.
6. **Records and reports** can provide indications of learning needs.
7. The **literature** for nursing issues and trends, interviews with experts in their fields, nursing audits and quality improvement reports also indicate learning needs.
8. **Discussions** with consumers can reveal learning needs for healthcare professionals. Changing conditions within a society often impose learning demands on nurses.

Objectives describe behavioral changes expected in learners as a result of participation in an educational activity. Objectives direct the selection of content, describe the behavioral outcomes the participant is expected to achieve, and provide a means for determining learning has taken place (evaluation). For short continuing education experiences, objectives should state behavioral changes that can be accomplished by the end of the activity. Long-term behavioral changes are difficult to achieve within the time span allotted for most continuing education activities. It is best to confine expected outcomes to those that can be realistically evaluated at the conclusion of the activity.

Behavioral objectives describe what the learner will be able to do if learning has occurred. When stating behavioral objectives, use words that describe Action and what can be Observed and Measured. The following Grid may be useful when writing objectives.

Writing Measurable Learning Objectives

Level	Definition	Sample Verbs		Sample Objectives
Knowledge	Student recalls or recognizes information, ideas and principles in the approximate form in which they were learned	Write Label State Distinguish Describe	List Name Define Match	List two common causes of airway obstruction. Identify the causes of airway obstruction.
Comprehension	Student translates, comprehends, or interprets information based on prior learning	Explain Paraphrase Illustrate Determine Review	Summarize Describe Classify Identify Discuss	Explain the pathophysiology of gastritis.
Application	Student selects, transfers and uses data & principles to complete a problem or task with a minimum of direction	Use Solve Apply Develop Interpret	Compute Demonstrate Construct Classify Relate	Demonstrate the cleaning and high level disinfection of a flexible endoscope.
Analysis	Student distinguishes, classifies, and relates the assumptions, hypotheses, evidence, or structure of a statement or question	Analyze Compare Separate Identify Examine	Categorize Contrast Calculate Distinguish Detect	Compare & contrast the drugs used for sedation
Synthesis	Student originates, integrates & combines ideas into a product, plan or proposal that is new to him or her	Create Hypothesize Develop Collect Modify Propose	Design Invent Classify Combine Formulate	Design a classification scheme for writing educational objectives that combines the cognitive, affective & psychomotor domains
Evaluation	Student appraises, assesses, or critiques on a basis of specific standards & criteria	Judge Critique Choose Assess Argue	Recommend Justify Compare Validate Consider	Critique unit policies based on the SGNA Practice Guidelines

Adapted from: Bloom, B.S. (Ed) (1956) Taxonomy of educational objectives: The classification of educational goals: Handbook I, cognitive domain. New York; Toronto: Longmans, Green. http://www.edpsycinteractive.org/topics/cognition/bloom.html

1. Each objective **should begin** with a verb that describes the behavior to be exhibited by the learner. Verbs such as define, name, and describe are measurable and are preferred.

   Each objective should be stated in terms of the learner and not the person presenting the material. For example, use "Define the terminology," as opposed to "The instructor will define the terminology."

   Words to be **avoided** in constructing behavioral objectives and are not measurable include understand, know, appreciate, realize and learn. For example, "Understand the terminology" is **not** acceptable.

2. Each objective should state only one expected behavioral reaction (e.g. define and describe are two behavioral reactions and should not be used in combination in stating the objective). For example, use "Define the term ERCP" as opposed to "Define and describe the ERCP procedure".

3. Each objective should involve a single subject. If an objective such as, "State five signs and symptoms of IBS and nursing action to be taken," is stated, the learner may be able to state the five symptoms but not the nursing action. An objective that contains more than one subject makes it difficult to evaluate whether the expected

outcome has been achieved.

4. Each objective should be stated clearly so the learner will know what outcome is expected of him/her at the conclusion of the educational activity.

Content consists of the facts, theories, or concepts that the participant must learn in order to achieve the objectives. Each objective must have related content. When submitting an application for contact hour approval of a nursing continuing education activity, content is listed in an outline format along with related time frames on a specific form, the Documentation Form (attachment 2), included with these materials.

For example, content for the objective, "List the steps for reprocessing flexible gastrointestinal endoscopes" might include the content list;
A. Precleaning
B. Leak testing
C. Manual cleaning
D. Rinse after cleaning
E. High level disinfection
F. Rinse after high level disinfection
G. Drying
H. Storage.

B. _Implementing the Educational Activity_

Teaching methods are the design elements used to enhance or facilitate the learning process. Methods should be chosen which take into consideration the target audience: adult learners. The methods should encourage discovery, complement the delivery of content, stimulate interest, take into consideration the availability of resources, and involve as many human senses as possible. Most adults prefer to be actively involved in the learning process, so techniques that involve the learner are encouraged. Some examples of methods that permit adults to actively rather than passively participate are: debates, forums, panels, case presentations, problem-solving clinics, discussion groups, simulations, games, role-playing, demonstrations, skits and vignettes.

Faculty/presenters comprise the human resource component of designing an educational activity. As teachers, they guide the learning process. It is essential that speakers chosen to present topics have the necessary qualifications (e.g., physicians address medical regimes, nurses' address nursing care, and attorneys address legal aspects). Essential qualifications include a comprehensive knowledge base and practical experience in applying such knowledge. Stage presence is not imperative, but helpful if combined with the above qualifications. More importantly, speakers must have the ability to organize their knowledge about a subject and convey it to the participants in a useful way. Because the primary concern of nurses is nursing, one or more speakers in an educational activity for nurses should be nurses. Speaker qualifications should be documented on the Biographical Data Form when making application for contact hour approval for an educational activity. To ensure that continuing education activities are free from bias, all speakers must declare any conflicts of interest they may have during their presentations. Additionally, the conflict must be resolved prior to the presentation. .

C. _Evaluating the Educational Activity_

Evaluation is the process used to describe the effectiveness of the educational activity in meeting the stated objectives and should be done after every learning activity. There is an evaluation template included on the Approver Unit application. In addition, a template for the outcomes measures survey can be found on the application as well.

Time should be allocated at the completion of the educational activity for evaluation to take place.
This time is included in the calculation of contact hours.

Evaluation data are used as feedback for future learning. A process evaluation evaluates the learner's overall general satisfaction with the learning experience. This component of evaluation usually asks questions relating to faculty, course objectives, course content, teaching/learning methods and physical facilities. The content evaluation evaluates change in knowledge, affect or skill. Areas usually covered by this part of the evaluation can include self-evaluation

of achievement of objectives, a pre- and post-test to illustrate change in knowledge from the beginning to the end of the educational activity, or a return-demonstration to document achievement of a skill. With adult learners, the evaluation tool should include both process and content components.

Post activity, an outcomes measures survey is to be distributed to participants to further evaluate the changes in knowledge, affect or skill based on the information learned during the activity.

Accreditation. A voluntary process in which a nongovernmental agency or institution, organization, or agency appraises and grants accredited status to institutions and/or programs or services that meet predetermined structure, process, and outcome criteria.

Adult Learning Principles. "The basis for or the beliefs underlying the teaching and learning approaches to adults as learners based on recognition of the adult individual's autonomy and self-direction, life experiences, readiness to learn, and problem orientation to learning. Approaches include mutual, respectful collaboration of educators and learners in the assessment, planning, implementation, and evaluation of educational activities." (ANA, 2010).

Appeal. A process that allows a provider to request that the SGNA Executive Board review a decision by the Continuing Education Peer Review Group not to approve an application.

Approval. A decision made by an accredited approver that the criteria for approval of continuing education have been met.

Bias. Tendency or inclination to cause partiality, favoritism or influence.

Biographical Data. Information required of persons involved in the peer review process or the planning and delivery of continuing education activities. The data provided should document their qualifications relevant to the continuing education process or a specific activity with respect to their education, professional achievements and credentials, work experience, honors, awards, and/or professional publications.

Commercial Interest. Any entity either producing, marketing, re-selling, or distributing healthcare goods or services consumed by or used on patients or an entity that is owned or controlled by an entity that produces, markets, re-sells or distributes healthcare goods or services consumed by or used on patients. Exceptions are made for non-profit or government organizations and non-healthcare related companies.

Commercial Support. Financial or in-kind contributions given by a commercial interest, which is used to pay all or part of the costs of a CNE activity. Providers of commercial support may not be providers or joint-providers of an educational activity.

Conflict of interest. An affiliation or relationship of a financial nature with a commercial interest organization that might bias a person's ability to objectively participate in the planning, implementation, or review of a learning activity. All planners, reviewers, and faculty/presenters/authors are required to complete biographical/conflict of interest forms.

Consistency. Holding the same or comparable principle or practice.

Content reviewer. An individual selected to evaluate an educational activity during the planning phase or after it has been planned but prior to delivery to learners for quality of content, potential bias, and any other aspects of the activity that may require evaluation.

Contact Hour. A unit of measurement that describes 60 minutes of an organized learning activity. One contact hour = 60 minutes

Content. "Subject matter of education activity that relates to the education objectives." (ANA, 2010).

Content Expert. An individual with documented qualifications that demonstrates education, knowledge, and experience in a particular subject matter.

Continuing Education Unit (CEU). The CEU is an educational measurement utilizing the criteria of the International

Association for Continuing Education and Training (IACET). CEU and CNE are not synonymous.

Continuing Nursing Education (CNE) activities. "Those learning activities intended to build upon the educational and experiential bases of the professional RN for the enhancement of practice, education, administration, research, or theory development, to the end of improving the health of the public and RNs' pursuit of their professional goals." (ANCC, 2013)

Continuing Education Peer Review Group (CEPRG). The administrative body within SGNA responsible for implementing the approval process.

Criteria. Relevant, measurable indicators of the standards.

Educational Activity. "A planned, organized effort aimed at accomplishing educational objectives." (ANA, 2010).

Educational Objective. "A statement of a learner outcome(s) of an education activity that is measurable and achievable within the designated time frame." (ANA, 2010)

Enduring material. A non-live CNE activity that "endures" over time. The learning experience by the nurse can take place at any time and in any place.

Evaluation. The process of determining significance or quality by systematic appraisal and study (ANA, 2010).

Goal. A statement of broad direction or general intent.

Inservice Education. Learning activities which take place in the work setting and are intended to help staff members in performing their assigned responsibilities specific to the expectations of the employer.

Joint-providership. Shared planning, developing, and implementing an educational activity by two or more individuals, organizations, or agencies.

Learner-Directed, learner-paced activities. A learning activity where the learner takes the initiative in identifying his/her learning needs, formulating learning goals, identifying human and material resources for learning, choosing and implementing appropriate learning strategies, and evaluating learning outcomes. The learner determines the pace at which he/she engages in the activity. Learner directed activities may be developed with or without the help of others but they are engaged in by only one individual (ANCC, 2011).

Need. "Discrepancy between what is desired and what exists." (ANA, 2010).

Needs Assessment. Process by which a discrepancy between what is desired and what exists is identified (ANCC, 2013).

Nurse Peer Reviewer. The nurse peer reviewer is:
- Actively involved in evaluating each approved provider or individual activity applicant to evaluate adherence to ANCC criteria
- Currently licensed RN with a baccalaureate or higher degree in nursing

Nurse Planner. The Nurse planner is:
- Currently licensed RN with a baccalaureate or higher degree in nursing or international equivalent
- Involved in all aspects of planning, implementation, and evaluation of each CNE activity
- Responsible for ensuring that appropriate educational design principles are used and processes are consistent with the ANCC accreditation program criteria.

Off label Use. Use of products for a purpose other than that for which it was approved by the Food and Drug Administration (FDA).

Orientation. The means by which new nursing staff are introduced to the philosophy, goals, policies, procedures, role

expectations, physical facilities, and other factors needed to function in a specific work setting. Orientation is provided at the time of employment and at other times when changes in roles and responsibilities occur in a specific work setting.

Outcome measurement. "The process of observing, describing, and quantifying predefined indicators of outcomes of performance." (ANA, 2010).

Peer Review. Professional judgment on the quality of the continuing education offered based on designated standards and criteria for continuing education in nursing.

Planning Committee. A group of at least two individuals which includes one nurse planner and one individual with subject matter expertise, who are responsible for planning the educational activity.

Provider. An individual, institution, organization, or agency responsible for the development, implementation, evaluation, financing, record keeping, and quality of nursing continuing education activities.

Provider Directed, learner paced. An educational activity where the provider controls all aspects of the learning. The provider determines the learning objectives based on needs assessments, content of the learning activity, the method by which it is presented and evaluation methods. The learner determines the pace at which the learning activity is engaged (ex. self-study module).

Provider Directed, provider paced. An educational activity where the provider controls all aspects of the learning. The provider determines the learning objectives based on needs assessments, content of the learning activity, the method by which it is presented and evaluation methods.

Purpose: A statement describing what the learner will be able to do at the conclusion of the educational activity.

Sponsorship. Financial or In-Kind contribution from an organization that does not fit the category of a commercial interest.

Target Audience. Group for which an educational activity has been designed.

Teaching Strategies. Instructional methods and techniques which are in accord with principles of adult learning.

**APPENDIX C
Bibliography**

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Anderson, L.W., & Krathwohl (Eds.). (2001). A *Taxonomy for Learning, Teaching, and Assessing: A Revisions of Bloom's Taxonomy of Educational Objectives*. New York: Longmans, Green.

Bloom, B., Englehart, M., Furst, E., Hill, W., Kwathwohl, D. (1956). *Taxonomy of educational objectives: The classification of educational goals. Handbook I: Cognitive domain.* New York, Toronto: Longmans, Green.

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Demographic Data

Activity Title: Endoscope Reprocessing: A Quick Review

What is the Purpose or Goal of the Activity? The purpose of this program is to review of the steps of gastrointestinal endoscope reprocessing for GI nursing staff.

What is the start date of the activity? May 16, 2015

Tell us about the planning committee contact person:

    First Name: Grace

    Last Name: Kelsey

    Email: gracern1@yahoo.com

    Phone: 555.555.5555

    Address: 1060 West Addison

    City: Chicago

    State: Illinois

    Zip: 60613

Name of Region or Non-profit organization applying: South Chicago SGNA

This program is provided by a (check one):

■ *SGNA Regional Society   ☐Other Non-Profit Organization

*SGNA Regional Society programs are those provided by an SGNA Regional Society for their members.

Activity type (check one):

■ Provider directed, provider paced: Live (in person or webinar)

☐ Provider directed, learner paced: Enduring material

  Start date of enduring material: _____

  Expiration date of enduring material: _____

Target Audience and Needs Assessment

Who is the target audience for this activity?

▮ RN's
▮ LVN's/LPN's
▮ Nursing Assistive Personnel
☐ Other, Provide Details _____

How was the need for this activity assessed? (Check all that apply)

▮ Surveying or requesting input from stakeholders, target audience, learners, managers, or subject matter experts
☐ Reviewing evaluation summaries of previous educational activities
▮ Reviewing performance improvement activities to identify opportunity for Improvement
☐ Reviewing trends in literature, law, and healthcare

Findings from the needs assessment indicated. (Check all that apply)

▮ Gap in knowledge
▮ Gap in skills
▮ Gap in practice
Other, describe _____

The gaps in knowledge, skills or practice are related to (Describe)

Staff performing gastrointestinal endoscope reprocessing lack the knowledge and skills to properly perform the reprocessing procedure.

Is the content of this program evidence-based or based on the best available evidence?

▮ Yes. Examples may include but are not limited to evidence-based practice, literature/peer reviewed journals, clinical guidelines, best practices, and content experts/expert opinions.
☐ No. If no, explain why not: _____

Participant information

How will you verify attendance at the activity?

■ *Sign-in sheets

☐ Computer login

☐ Other, please describe: _____

*Any sign-in method must include name and a unique identifier (e.g. email address)

What will successful completion of this educational activity be based on?

■ Attendance at the entire event or session

☐ Partial credit based on partial attendance at the event or session

How will learners be told about the completion criteria?

☐ Flyer or brochure

■ Announcement at beginning of activity

☐ Handout or syllabus

Planning Committee and Presenter information

NOTE: A minimum of two (2) people <u>must</u> be involved in the planning process. One program planner must have a baccalaureate degree in nursing (BSN) or higher.

Planners and Presenters

List each planner and presenter name.

DOWNLOAD, complete and attach the SGNA Biographical/Conflict of Interest (BIO/COI) Form for EACH planner and presenter.

Note that all forms must be attested by the planner or presenter AND by a nurse planner. Nurse planners cannot attest their own form.

If forms are filled out incorrectly or inadequately, the forms will need to be corrected and resubmitted.

Last Name	First Name	Planner	Presenter	
Kelsey	Grace	X		Bio_Kelsey.docx
Kerry	Patricia		X	Bio_Kerry.docx
Christopher	Alan	X		Bio_Christopher.docx

Activity Documentation

Title of Activity: Endoscope Reprocessing: A Quick Review

Total Number of Contact Hours: 1.33 Total Minutes **80** divided by 60 = **1.33** contact hour(s)	Total number of GI-Specific Hours (*estimate):

Activity Objectives

Objectives Objectives must be measurable, singular, and learner focused. *Ex: List the indications for colonoscopy.*	**Content** Content should be listed and not merely a restatement of the objective. It should be directly related to the corresponding objective. *Ex: a) Lower GI bleeding, b) evaluation of abnormalities found on radiographic exam, c) screening in patients with a personal history of polyps or colorectal cancer*	**Time Frame** List time allotted. *Ex: 15 minutes*	**Presenter** List the presenters for each objective. *Ex: Christopher A. Kelsey, MD*	**Teaching Strategies** List all strategies utilized. *Ex: Slide presentation, lecture, case study*
Discuss resources for reprocessing guidelines.	1. SGNA 2. ASGE/SHEA Multisociety guideline on reprocessing 3. OSHA	10 minutes	P. Kerry	Lecture, Slide presentation
Review the steps for reprocessing	1. precleaning, 2. leak testing, 3. manual cleaning, 4. rinse after cleaning, 5. high level disinfection,(manual or automated) 6. rinse after high level disinfection, 7. drying, and 8. storage	60 minutes	P. Kerry	Lecture, Slide presentation, Discussion
Q&A and evaluation		10 minutes	Unassigned	

Add additional Objective:
Objectives:
List the educational objectives

How To Write Clear Objectives

3

Content:

Provide an outline of the content topic presented and indicate to which objective(s) the content is related

| |
| |

Time Frame:

Provide a time frame for topic/content area

| |
| |

Presenter

List the presenter for each topic or content area

Teaching Strategies

List the teaching strategy by each presenter for each topic or content area

| |
| |

Compliance and Disclosure Information

Commercial Support Form Simply click to down-load, then follow the instructions.

Choose File	Attach

Commercial_Support.docx

Sponsorship Form Simply click to down-load, then follow the instructions.

Choose File	Attach

Marketing Template

Choose File	Attach

Program_Brochure.pdf

Is there Commercial Support <u>or</u> Sponsorship for this activity?

▉ Yes. If there is Commercial Support or Sponsorship, DOWNLOAD the Commercial
 Support OR Sponsorship Agreement Form.

☐ No

Will disclosure be made to all program participants prior to the CNE activity?

▉ Yes

☐ No

Previous Denials

Has the applicant ever been **denied** approval by or had approval suspended or revoked for an individual activity by SGNA or by another ANCC Accredited Approver?

☐ Yes. If yes, please provide the following information:

    Date:

    Action: ☐ Denial ☐ Suspension ☐ Revocation☐

    Brief description: _____

▉ No

Joint-Providing

Joint-providing is when an applicant provides the educational activity <u>with another organization</u>. The joint-providing organization may not be a commercial interest organization. (Refer to Guidelines for additional information).

☐ *Yes, I am joint-providing this program.

▉ No, I am not joint-providing this program.

*If you are joint-providing, you will be contacted by the SGNA Approver unit for additional information. Name of joint providing organization(s) _____

Marketing materials

The SGNA Approver Unit must review your marketing materials. The following materials should be included on your marketing materials: Title of program, Presenter(s)' name and credentials, Date, Location, Provider of CNE event, Contact Person's name and contact information and Contact hours (# of contact hours pending).

NOTE: If there is Commercial support or Sponsorship, the following statement must appear on the marketing materials:

"There is commercial support or sponsorship for the program provided by [Name of commercial interest or sponsor] provided in the form of _____

Evaluation Form and Certificate of Completion

 Evaluation Form Simply click to down-load, then follow the instructions.

Evalution_Final.doc

 Certificate of Completion Simply click to down-load, then follow the instructions.

Certificate_Final.doc

The evaluation tool will be used to:
▌Provide feedback to presenters
▌Plan for future programs
☐ Other – Please Provide Details: _____

I agree to maintain the following documents for six (6) years. These forms may be accessed only allowed to authorized individuals and available to the SGNA Approver unit upon request. The Post Activity Packet will be submitted to SGNA.

   a. Complete application packet, including Biographical Data/Conflict of Interest Forms, Activity Documentation Form, Commercial support or Sponsorship form, Evaluation Form, Certificate of attendance, copy of marketing material (e.g., brochure, flyer) and final approval letter with the number of contact hours awarded .
   b. Post Activity Packet, including:
   - Roster of attendees with unique identifier
   - Final certificate of completion awarded to participants
   - Summary of evaluations
   - Post activity checklist (See CE Approver Unit landing page)
   - Plan for outcome measures survey (See CE Approver Unit landing page)

▌ Yes
☐ No