



Association of Regulatory Boards of Optometry, Inc.

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### Council of Optometric Practitioner Continuing Education (COPE).

The COPE Committee and the ARBO board of directors have worked diligently over the last two years since our National Optometric Continuing Education Conference (NOCEC) in May 2006, to address the issues identified by the attendees of that conference. The NOCEC was well attended and represented all aspects of the Optometric profession. The outcome acknowledged three areas within continuing education that would benefit the profession and the public we serve. The first was the need for Continued Competence and Board Certification to be assessed for the Optometric Profession. To that end ARBO has been an active participant in the Joint Board Certification Project team (JBCPT) along with the AOA, the American Academy of Optometry (AAO), the National Board of Examiners in Optometry (NBEO), the Association of Schools and Colleges of Optometry (ASCO) and the American Optometric Student Association (AOSA). This participation is ongoing and a process is expected to be presented to the profession at the 112<sup>th</sup> Annual AOA Congress, one among other appropriate venues.

The second identified area within optometric continuing education (CE) was to assure and maintain core competencies. ARBO has investigated avenues to assure and maintain core competencies. Potential avenues of analysis have included a Patient Assessment and Management Study with a link to the COPE core competencies and a remediation avenue through track education. At this time ARBO has agreed to hold further development of this study and the track education in deference to the JBCPT work product.

The third area identified was the establishment of standards for commercial support. The announcement was made during a press conference at SECO 2008 in Atlanta. The standards will supplement the existing guidelines for COPE approved administrators and add requirements to manage corporate support of COPE approved CE with the highest integrity and free of commercial bias.

These standards will benefit the relationship between industry and optometric continuing education and will give clear direction to both providers and industry. By ensuring compliance with these standards, industry is protected, optometric CE integrity is protected, the profession benefits from subsidized education, plus, the public is protected and benefits from improved quality of care.

Final guidelines will be released during the AOA Congress in Seattle, June 2008, with formal implementation anticipated to be required on January 1, 2009. This initial implementation period will entail a "grace period" of six months to allow integration of the standards by all stakeholders. Oversight and enforcement during this period will consist of notification of non-compliance and assistance with compliance issues. Full compliance will be required by July 1, 2009.

ARBO's commitment is to continue to provide salient and unbiased CE that is not influenced by a specific company, product or brand. Our responsibility is to provide and implement the standards necessary for establishing and protecting the integrity of optometric CE.

The Standards for Commercial Support are as follows:

The following is a summary of the "Standards for Commercial Support for Instructors":

1. Lecturer must submit a course, not a company. An Administrator can submit a course but the Lecturer must sign.
2. Lecturer must be paid by the Administrator, not the supporting company.
3. Lecturer should not seek COPE approval if the presentation is for the purpose of promoting products, instruments or devices.
4. Lecturer will include a disclosure slide during their presentation that includes and addresses the following regarding the presentation of their course:
  - Their independence in preparing the course material and information.
  - Resolution of personal conflicts of interest.
  - Appropriate use of commercial support.
  - Appropriate management of associated commercial promotion.
  - Content and format without commercial bias.
  - Disclosures relevant to potential commercial bias.

In order for continuing education event to be COPE approved, support must be in the form of an "Unrestricted Educational Grant". In other words, support must be in the form of financial support only. This support will require a signed COPE "Supported CE Event Agreement" between the supporting company and the COPE Qualified Administrator. In addition, no one other than the COPE Qualified Administrator can sign this document. All points in this agreement must be addressed and all must be agreed upon to maintain COPE Qualified Administrator Status.

The following Points of Agreement Are Intended to Resolve Conflicts of Interest Between the Administrators and Supporting Companies:

1. To Abide by Principles inherent in COPE Standards for Commercial Support.
2. Supporting companies will not have control over selection of speakers.
3. Supporting companies will not have control over scientific content in courses.
4. To maintain control of promotional exhibits and materials.
5. Assure that courses are free of commercial bias.
6. Assure that the Administrator maintains overall control of all aspects of the program.
7. Assure that speakers disclose to the learners prior to presentation of off-label or experimental information.
8. To acknowledge the Purpose of the Company's Educational Grants

On-Site Review Provides a System For Compliance:

The new guidelines will be monitored for compliance through the On-Site Review (OSR) system which is being proactively expanded. COPE's objective for the OSR is not to impose penalties but to encourage and assist in compliance with a means of review that is uniform and fair.

The lecture being reviewed must occur at a COPE qualified event. The OSR will be conducted by certified and experienced COPE Reviewers who will provide their service on a voluntary basis which will help ensure an objective and unbiased process. There are currently over 100 COPE Reviewers, however, ARBO is currently working on expanding this base.

Each OSR will implement the following procedures:

1. A password protected website allows certified Reviewers to download the application and outline of a lecture along with checklists for both the event administration and course presentation.
2. These original documents assist the Reviewer in determining that the lecture being presented is not substantially different from the course originally submitted and is free of commercial bias.
3. The Reviewer will complete a checklist that examines compliance with the published guidelines.
4. Separate checklists are completed for lecturers and administrators.
5. After completion, the checklist is then submitted to COPE.