The American Nurses Credentialing Center (ANCC) Accreditation Program recognizes organizations that have demonstrated excellence in the ability to deliver continuing nursing education (CNE) or approve organizations or individuals that have demonstrated excellence in the ability to deliver continuing nursing education. The Accreditation Program is committed to ensuring the integrity of the accreditation process through systematic, evidence-based evaluation of application materials submitted by qualified applicants for Accredited Provider or Accredited Approver status. ANCC’s Accreditation Program contributes to improving healthcare outcomes by providing a voluntary peer-review process that defines standards for high performance in providing quality CNE and measures compliance with those standards for organizations that elect to apply for accreditation.
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The ANCC Accreditation Program is committed to excellence in continuing nursing education. For nearly 4 decades, the ANCC Accreditation Program has formally recognized organizations that provide high-quality continuing nursing education or demonstrate the ability to approve other organizations or individuals that provide high-quality continuing nursing education for professional registered nurses.

The 2013 ANCC Primary Accreditation Application Manual for Providers and Approvers is the culmination of efforts that began in 2009. The ANCC Accreditation Program began a journey to restructure the Primary Accreditation Program in response to recommendations of experts in the field of continuing education, including the Commission on Accreditation (COA), the Josiah Macy Jr. Foundation, and the Institute of Medicine (IOM). These recommendations were incorporated into a new manual for organizations pursuing accreditation as providers or approvers. The 2013 ANCC Primary Accreditation Application Manual for Providers and Approvers includes revised program criteria that demonstrate an increased focus on structure, process, and quality outcomes that impact nursing professional development.

This mini-manual provides a comprehensive overview of the educational design process for continuing education activities with an accompanying glossary and reference list.

The ANCC Accreditation Program supports the lifelong learning needs of professional registered nurses by ensuring that educational activities are designed using criteria that are evidence-based and that are independent from commercial influence. By participating in accredited continuing nursing education, professional registered nurses are able to maintain continued competence in a rapidly changing healthcare environment.

Kathy Chappell, MSN, RN
Director, Accreditation Program
American Nurses Credentialing Center
EDUCATIONAL DESIGN PROCESS

This chapter outlines the process of developing and/or evaluating individual educational activities according to ANCC Accreditation Program criteria.

The educational design expectations described in this chapter and applicable at the individual activity level are fundamental to high-quality continuing nursing education (CNE). Accordingly, applicants must ensure that these expectations are met and that the ANCC criteria for accreditation are applied in such a manner as to ensure the applicant’s Provider or Approver Unit offers individual educational activities that meet these criteria or approves other organizations and/or individuals that provide individual educational activities that meet these criteria.

ANCC’s Accreditation Program specifies a comprehensive set of educational design criteria to ensure that individual education activities are effectively planned, implemented, and evaluated according to educational standards and adult learning principles.

CNE involves “systematic professional learning experiences designed to augment the knowledge, skills, and attitudes of nurses, and therefore enrich nurses’ contributions to quality healthcare . . .” (ANA, 2010, p. 43). The knowledge, skills, or attitudes gained from CNE activities can be applied regardless of the activity participant’s employer. See Figure 4 (“Awarding Contact Hours”) and Table 3 (“Evaluating Activities for Awarding Continuing Education Credit”).

In contrast, staff development activities are typically designed to enhance performance in participants’ current job roles and are based on a specific facility’s/organization’s policies and procedures, equipment, and resources. When staff development learning activities convey new content knowledge that would be transferable to other job settings, the organization may be able to award contact hours. Some in-service programs, based on their content, may include new, transferable knowledge.

Staff development departments may offer both CNE activities and in-service activities. For instance, orientation programs are typically facility-specific or organization-specific. Contact hours may not be awarded for the employer-specific content.
Contact hours may not be awarded for review or refresher courses that focus on functioning in a particular facility or reinforcing basic knowledge. However, contact hours may be awarded for refresher courses that provide nurses re-entering the job market with advanced knowledge or a new skill set required to function in the role as an RN.

Types of activities:

- **Provider-directed, provider-paced**: The provider controls all aspects of the learning activity. The provider determines the learning objectives based on a needs assessment, the content of the learning activity, the method by which it is presented, and evaluation methods. (Examples include live activities and live Webinars.)

- **Provider-directed, learner-paced**: The provider controls the content of the learning activity, including the learning objectives based on a needs assessment, the content of the learning activity, the method by which it is presented, and the evaluation methods. The learner determines the pace at which the learner engages in the learning activity. (Examples include print articles, online courses, e-books, and self-learning modules/independent studies.)

- **Learner-directed, learner-paced**: The learner takes the initiative in identifying his or 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 also determines the pace at which he or she engages in the learning activity. Learner-directed activities may be developed with or without the help of others, but they are engaged in by only one individual.
**Planning Process:**
Determining Ability to Award Contact Hours

Is the activity designed to orient a new employee?

Yes

- Facility-Specific Orientation Program: policies, procedures, resources, or similar

No

- NOT eligible for awarding continuing education credit

Is the activity designed to teach a skill or evaluate a nurse’s competency to perform a specific skill that is unique to his or her work setting?

Yes

- Facility-Specific Orientation Program: policies, procedures, resources, or similar

No

- NOT eligible for awarding continuing education credit

Is the activity designed to promote the nurse’s professional development or performance?

Yes

Is the content:
- Generalizable beyond the employer?
- Beyond basic knowledge for the individual nurse participant?
- Evidence-based or based on best-available evidence?

No

- NOT eligible for awarding continuing education credit

**Figure 1.** Awarding Contact Hours
Educational activities must meet the following guidelines in order to be eligible for awarding of continuing education credit (contact hours):

- Content must be beyond basic knowledge
- Content must be generalizable regardless of employer of the nurse
- Content must enhance professional development or performance of the nurse

**Determination of whether to award continuing education credit may be dependent on the learner, for example:**

- If the course is the same course repeated every year for nurses, the nurse has taken the course previously, and no new content is included, it should not be classified as continuing education
- If the class is being offered to a new nurse and the content is new and is generalizable knowledge, it can be classified as continuing education
- If the class is being repeated to nurses who have taken the course previously and a portion is new and updated information, the new information can be classified as continuing education

**Content must be:**

- Evidence-based or based on the best-available evidence
- Presented without promotion or bias

An educational activity may include content that is eligible for continuing education credit and content that is not eligible for continuing education credit. In that circumstance, continuing education credit may be awarded for the content of the activity that is appropriate, based on the guidelines stated above.

**TABLE 1.** Evaluating Activities for Awarding Continuing Education Credit
The fundamental basis for all CNE activities is the educational design process. This chapter outlines the required components of an individual education activity in accordance with ANCC accreditation criteria. Whether used by a provider to develop activities or by an approver to evaluate activities, the educational design process remains consistent.

ASSESSMENT OF LEARNER NEEDS

CNE activities are developed in response to, and with consideration for, the unique educational needs of the target audience.

Each educational activity is based on a needs assessment that may be conducted using a variety of methods that may include but are not limited to:

- Surveying stakeholders, target audience members, subject matter experts, or similar
- Requesting input from stakeholders such as learners, managers, or subject matter experts
- Reviewing quality studies and/or performance improvement activities to identify opportunities for improvement
- Reviewing evaluations of previous educational activities
- Reviewing trends in literature, law, and healthcare

Sources of supporting evidence for needs assessment data may include but are not limited to:

- Annual employee survey data
- Literature review
- Outcome data
- Survey results from stakeholders
- Quality data
- Requests (via phone, in person, or by e-mail)
- Written evaluation summary requests
Assessment data is evaluated by the Nurse Planner and Planning Committee and is used to validate the need for each educational activity. Assessment data is used to identify and validate a gap in knowledge, skills, or practice that the educational activity is designed to improve or meet. Data is then used to formulate the objectives for the educational activity. The purpose and objectives address current needs of the learners in the target audience related to their practice or professional development. The faculty/presenters/authors, if applicable, work with the Nurse Planner and Planning Committee to develop objectives, content, and teaching methods for the target audience of nurses, including advanced practice and specialty nurses.

PLANNING EDUCATIONAL ACTIVITIES

Planning Committees must have a minimum of one Nurse Planner and one other planner to plan each educational activity. The Nurse Planner is knowledgeable about the CNE process and is responsible for adherence to ANCC criteria. One planner needs to have appropriate subject matter expertise for the educational activity being offered.

If additional individuals, such as faculty, presenters, or authors, will be creating or delivering content for the educational activity, Planning Committee members must identify the needed qualifications of the individuals chosen. The qualifications identified for faculty/presenters/authors for the educational offering may include but are not limited to:

- Content expertise
- Demonstrated comfort with teaching methodology (e.g., Web-based)
- Presentation skills
- Familiarity with target audience

The Nurse Planner is responsible for ensuring completion and review of Biographical Data/Conflict of Interest forms by each Planning Committee member and each faculty/presenter/author to ensure appropriate qualifications and evaluation of actual or potential bias. Faculty/presenters/authors must have documented qualifications that demonstrate their education and/or experience.
in the content area they are developing or presenting. Expertise in subject matter may be evaluated based on characteristics such as education, professional achievements and credentials, work experience, honors, awards, professional publications, or similar. The qualifications must address how the individual is knowledgeable about the topic and how the individual gained that expertise.

The Planning Committee, during the planning process, may also identify an individual(s) who functions as content reviewer(s). The purpose of a content reviewer is to evaluate an educational activity during the planning process 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. Content reviewers must also complete Biographical/Conflict of Interest forms that are reviewed by the Nurse Planner.

The Nurse Planner is responsible for evaluating actual or potential conflicts of interest and applying the resolution process to an actual or potential conflict of interest, if present.

During the planning phase, the Planning Committee is responsible for determining how participants will successfully complete the learning activity. The committee also evaluates whether the activity has or will have sponsorship or commercial support and, if so, how content integrity will be maintained, including what/how precautions should be taken to prevent bias in the educational content, and the methods that will be used to ensure full disclosure to activity participants.

**DESIGN PRINCIPLES**

The educational design process incorporates measurable educational objectives, best-available evidence, and appropriate teaching methods.

Once a gap in knowledge, skills, and/or practice has been identified through the needs assessment findings, thereby validating the need for the educational activity, the purpose can be developed. The purpose should be written as an outcome statement related to the learner at the conclusion of the activity (i.e., “The purpose of this activity is to enable the learner to...”).
Next are educational objectives, which are derived from the overall purpose of the activity.

Educational objectives are written statements that describe learner-oriented outcomes that may be expected as a result of participation in the educational activity. These statements describe knowledge, skills, and/or practice changes that should occur upon successful completion of the educational activity.

Specific objectives for the learning activity are developed collaboratively by the planners and faculty/presenters/authors (if applicable) and must relate to the purpose of the activity. Each objective should have one measurable action verb and specify what the learner will know or do once the objective has been completed (the outcome of attaining the objective).

- For an educational activity lasting 8 hours or less, with a single focus and purpose, it is appropriate to have objectives that flow from the purpose and reflect the learner’s progression through the activity.
- For an educational activity lasting more than 8 hours, or with multiple “tracks” or purposes, objectives should be specific to each session in that track.

Content for the educational activity must be congruent with each objective. Descriptions of content may not be a restatement of the objectives.

Content should be selected based on the most current available evidence. Documentation should support quality of evidence chosen for content. Examples include but are not limited to evidence-based practice, literature/peer-reviewed journals, clinical guidelines, best practices, and content experts/expert opinion.

Following development of objectives and selection of content, teaching-learning strategies are determined. The methods, strategies, and materials to be used by faculty/presenters/authors to cover each educational objective are identified. These must be congruent with both objectives and content.

As part of the design process, the Planning Committee must develop ways in which learners will be provided feedback. This can include but is not limited to having question/answer sessions during or at the conclusion of a learning activity, self-check questions, or comments within an activity, returning
pre- and/or post-test questions with answers, or engaging learners in dialogue during or after the learning activity.

Successful completion for both live and enduring material/Web-based activities should be defined for each educational activity, consistent with the purpose, objectives, and teaching/learning strategies. The criteria for successful completion are based on the format of the educational activity and should indicate what constitutes successful completion, the rationale for the method of determining successful completion, and whether or not partial credit is awarded for participation. Criteria for successful completion may include attendance at the entire event or session, attendance for a predetermined percentage of the event, attendance at one or more sessions, completion/submission of the evaluation form, achieving a passing score on a post-test, and/or a return demonstration. The Planning Committee may elect to provide partial credit for educational activities. This could be contact hours awarded based on half-day attendance or on a certain number of sessions attended in a multiday conference.

The Planning Committee must determine how participation will be verified. The attendance/participation verification may include but is not limited to sign-in sheets/registration forms, signed attestation statement by participant verifying completion of an entire activity, or a collection of participation verification via computer log. Recordkeeping requires that the Planning Committee determine the method to collect both the participant’s name and a unique identifier.

**AWARDING CONTACT HOURS**

Contact hours are determined in a logical and defensible manner. Contact hours are awarded to participants for those portions of the educational activity devoted to the learning experience and time spent evaluating the activity. One contact hour = 60 minutes. Activities must last a minimum of 30 minutes. If rounding is desired in the calculation of contact hours, the provider must round down to the nearest 1/10th or 1/100th (e.g., 2.758 should be 2.75 or 2.7, not 2.8). Educational activities may also be conducted “asynchronously” and contact hours awarded at the conclusion of the activities.
Time frames must match and support the contact hour calculation for live activities. For enduring materials, print, electronic, Web-based, etc., the method for calculating the contact hours must be identified. The method may include but is not limited to a pilot study, historical data, or complexity of content.

Contact hours may not be awarded retroactively except in the case of a pilot study. Participants in a pilot study assist in determining the length of time required for completing an educational activity in order to calculate the number of contact hours to award. Those participants may be awarded contact hours once the number is determined.

**EVALUATION**

A clearly defined method that includes learner input is used to evaluate the effectiveness of each educational activity. The Planning Committee must determine the method(s) of evaluation to be used. The evaluation components and method of evaluation should be relative to the desired outcome of the educational activity. Evaluations may include both short- and long-term methods, as illustrated in the table below.

<table>
<thead>
<tr>
<th>Evaluation Methods</th>
<th>Short-Term</th>
<th>Long-Term</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Evaluation form with questions related to individual activity objectives. For example:</td>
<td>Longitudinal study with self-reported change in practice</td>
</tr>
<tr>
<td></td>
<td>- Effectiveness of speakers</td>
<td>- Data collection related to quality outcome measures</td>
</tr>
<tr>
<td></td>
<td>- Anticipated change in practice</td>
<td>- Observation of performance</td>
</tr>
<tr>
<td></td>
<td>- Active participation in learning activity</td>
<td></td>
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<tr>
<td></td>
<td>- Post-test</td>
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<td></td>
<td>- Return demonstration</td>
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<td></td>
<td>- Case study analysis</td>
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<td></td>
<td>- Role-play</td>
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</tbody>
</table>

**TABLE 2. Evaluation Methods**
Once the evaluations are complete, a summative evaluation is generated. The Planning Committee and/or Nurse Planner reviews the summative evaluation to assess the activity’s effectiveness and to identify how results may be used to guide future educational activities.

ACCREDITATION/APPROVAL STATEMENT

The accreditation/approval statement is the mark of an ANCC-accredited or approved organization. All Accredited Providers, Approved Providers, and Individual Activity Applicants are required to include the accreditation/approval statement of the accredited organization that has either developed or approved the activity in all communications, marketing materials, certificates, and other documents that refer to awarding contact hours or CNE credit and when referring to the organization as accredited by ANCC or approved by an ANCC-accredited organization.

The accreditation/approval statement must be displayed clearly to the learner and worded correctly according to the most current Accreditation Manual. The accreditation/approval statement must stand alone on its own line(s) of text.

When referring to contact hours, the term “accredited contact hours” should never be used. An organization is accredited or approved; contact hours are awarded.

DOCUMENTATION OF COMPLETION

A document or certificate of completion is awarded to a participant who successfully completes the requirements for the individual education activity. The document or certificate must include:

- Title and date of the educational activity
- Name and address of the provider of the educational activity
  (Web address acceptable)
- Number of contact hours awarded
COMMERCIAL SUPPORT AND SPONSORSHIP

A commercial interest, as defined by ANCC, is any entity 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. Exceptions are made for nonprofit or government organizations, non-healthcare-related companies and healthcare facilities.

Commercial support is financial or in-kind contributions given by a commercial interest that are used to pay for all or part of the costs of a CNE activity.

Sponsorship is financial or in-kind contributions from an organization that does not fit the category of a commercial interest and that are used to pay for all or part of the costs of a CNE activity.

Organizations providing commercial support or sponsorship may not provide or co-provide an educational activity.

Content integrity of the educational activity must be maintained in the presence of commercial support or sponsorship. The provider developing the educational activity is responsible for ensuring content integrity. Providers developing educational activities must develop written policies and/or procedures for managing commercial support and/or sponsorship if the provider accepts commercial support or sponsorship.

Written policies and/or procedures related to managing commercial support and sponsorship must address the following:

- Template of an agreement to be used for commercial support (Commercial Support Agreement) or Sponsorship (Sponsorship Agreement)
- The agreement must include:
Statement that the provider of commercial support or sponsorship may not participate in any component of the planning process of an educational activity, including:

- Assessment of learning needs
- Determination of objectives
- Selection or development of content
- Selection of presenters or faculty
- Selection of teaching/learning strategies
- Evaluation

Statement of understanding that the commercial support or sponsorship will be disclosed to the participants of the educational activity

Statement of understanding that the provider of commercial support or sponsorship must agree to abide by the provider’s policies/procedures

Amount of commercial support or sponsorship and description of in-kind donation

Name and signature of the individual who is legally authorized to enter into contracts on behalf of the provider of commercial support or sponsorship

Name and signature of the individual who is legally authorized to enter into contracts on behalf of the provider of the educational activity

Date the agreement was signed

Method of documenting how commercial support or sponsorship was used for the educational activity or activities

**CONFLICTS OF INTEREST EVALUATION AND RESOLUTION**

The potential for conflicts 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,* the products or services of which are pertinent to the content of the educational activity (see Figure 5). The Nurse Planner is responsible for evaluating the presence or absence of conflicts of interest and resolving any identified actual 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 should recuse himself or herself from the role as Nurse Planner for the educational activity.

*Commercial interest*, as defined by ANCC, is any entity 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. Nonprofit or government organizations, non-healthcare-related companies, and healthcare facilities are not considered commercial interests.

The Nurse Planner is responsible for ensuring that all individuals who have the ability to control or influence the content of an educational activity disclose all relevant relationships** with any commercial interest, including but not limited to members of the Planning Committee, speakers, presenters, authors, and/or content reviewers. Relevant relationships must be disclosed to the learners during the time when the relationship is in effect and for 12 months afterward. All information disclosed must be shared with the participants/learners prior to the start of the educational activity.

**Relevant relationships**, as defined by ANCC, are relationships with a commercial interest if the products or services of the commercial interest are related to the content of the educational activity.

- Relationships with any commercial interest of the individual’s spouse/partner may be relevant relationships and must be reported, evaluated, and resolved.

- Evidence of a relevant relationship with a commercial interest may include but is not limited to receiving a salary, royalty, intellectual property rights, consulting fee, honoraria, ownership interest (stock and stock options, excluding diversified mutual funds), grants, contracts, or other financial benefit directly or indirectly from the commercial interest.

- Financial benefits may be associated with employment, management positions, independent contractor relationships, other contractual relationships, consulting, speaking, teaching, membership on an advisory committee or review panel, board membership, and other activities from which remuneration is received or expected from the commercial interest.
Conflict of Interest

Conflict of Interest is considered an affiliation or relationship with a Commercial Interest Organization of a financial nature that might bias a person’s ability to objectively participate in the planning, implementation, or review of a learning activity. All planners, reviewers, faculty, presenters, authors, and content reviewers are required to complete Biographical/Conflict of Interest forms.

1. Is there any type of affiliation or relationship to disclose?
   - No: No Conflict of Interest exists
   - Yes: Is the affiliation or relationship related to the content of the educational activity?
     - No: No Conflict of Interest related to this educational activity
     - Yes: Conflict of interest to disclose and a resolution is required

Resolutions may include, but are not limited to the following:

- Removing individual with conflict of interest from participating in all parts of the educational activity
- Revising the role of the individual with conflict of interest so the financial relationship is no longer relevant
- Not awarding contact hours for a portion or all of the educational activity
- Content of the educational activity evaluated for bias and activity monitored to evaluate for commercial bias
- Content of educational activity evaluated for bias and participant feedback reviewed for commercial bias

FIGURE 2. Conflicts of Interest
Evaluation

The Nurse Planner is responsible for evaluating whether any relationship with a commercial interest is considered relevant to the content of the educational activity. Disclosures may be categorized in the following ways:

- No relevant relationship with a commercial interest exists. No resolution required.
- Relevant relationship with a commercial interest exists. The relevant relationship with the commercial interest is evaluated by the Nurse Planner and determined not to be pertinent to the content of the educational activity. No resolution required.
- Relevant relationship with a commercial interest exists. The relevant relationship is evaluated by the Nurse Planner and determined to be pertinent to the content of the educational activity. Resolution is required.

Resolution and Activity Assessment

Actions taken to resolve conflicts of interest must demonstrate resolution of the identified conflicts of interest prior to presenting/providing the educational activity to learners. Such actions must be documented and the documentation must demonstrate (1) the identified conflict and (2) how the conflict was resolved. Actions may include but are not limited to the following:

- Removing the individual with conflicts of interest from participating in all parts of the educational activity
- Revising the role of the individual with conflicts of interest so that the relationship is no longer relevant to the educational activity
- Not awarding continuing education contact hours for a portion or all of the educational activity
Undertaking review of the educational activity by a content reviewer to evaluate for potential bias, balance in presentation, evidence-based content or other indicator of integrity, and absence of bias, AND monitoring the educational activity to evaluate for commercial bias in the presentation.

Undertaking review of the educational activity by a content reviewer to evaluate for potential bias, balance in presentation, evidence-based content or other indicator of integrity, and absence of bias, AND reviewing participant feedback to evaluate for commercial bias in the activity.

**DISCLOSURES PROVIDED TO PARTICIPANTS**

Learners must receive disclosure of required items prior to the start of an educational activity. In live activities, disclosures must be made to the learner prior to initiation of the educational content. In enduring materials (print, electronic, or Web-based activities), disclosures must be visible to the learner prior to the start of the educational content. Required disclosures may not occur or be located at the end of an educational activity. If a disclosure is provided verbally, an audience member must document both the type of disclosure and the inclusion of all required disclosure elements.

**Disclosures always required include:**

- **Notice of requirements for successful completion of the educational activity:** Learners are informed of the purpose and/or objectives of the learning activity and the criteria that will be used to determine successful completion, which may include but are not limited to:
  - Required attendance time at activity (e.g., 100% of activity, or miss no more than 10 minutes of activity)
  - Successful completion of post-test (e.g., attendee must score X% or higher)
  - Completed evaluation form
  - Return demonstration
Presence or absence of conflicts of interest for planners, presenters, faculty, authors, and content reviewers:
Any influencing relationships, or lack thereof, of planners, presenters, faculty, authors, or content reviewers in relation to the educational activity. Individuals must disclose:

- Name of individual
- Name of commercial interest
- Nature of the relationship the individual has with the commercial interest

Disclosures required, if applicable, include:

- Commercial support:
  Learners must be informed if a commercial interest has provided financial or in-kind support for the educational activity.

- Sponsorship:
  Learners must be informed if an entity has provided financial or in-kind support for the educational activity.

- Non-endorsement of products:
  Learners must be informed that accredited status does not imply endorsement by the provider of the educational activity or ANCC of any commercial products discussed/displayed in conjunction with the educational activity.

- Expiration of enduring materials:
  Educational activities provided through an enduring format (e.g., print, electronic, Web-based) are required to include an expiration date documenting how long contact hours will be awarded. This date must be visible to the learner prior to the start of the educational content. The period of expiration of enduring material should be based on the content of the material but cannot exceed 3 years. ANCC requires
review of each enduring material at least once every 3 years, or more frequently if indicated by new developments in the field specific to the enduring material. Upon review of enduring material for accuracy and current information, a new expiration date is established.

RECORDKEEPING

Activity file records must be maintained in a retrievable file (electronic or hard copy) accessible to authorized personnel for 6 years.

Required recordkeeping components include:

- Title and location (if live) of activity
- Type of activity format: live or enduring
- Date live activity presented or, for ongoing enduring activities, date first offered and subsequent review dates
- Description of the target audience
- Method of the needs assessment
- Findings of the needs assessment
- Names, titles, and expertise of activity planners
- Role held by each Planning Committee member (must include identification of the Nurse Planner and content expert(s))
- Names, titles, and expertise of activity presenters, faculty, authors, and/or content reviewers
- Conflict of interest disclosure statements from planners
- Resolution of conflicts of interest for planners, if applicable
- Conflict of interest disclosure statements from presenters, faculty, authors, and/or content reviewers
Resolution of conflicts of interest for presenters, faculty, authors, and/or content reviewers, if applicable

Purpose of activity

Objectives of activity

Evidence of gap in knowledge, skill, or practice for the target audience

Content of activity: an Educational Planning Table or other documentation showing 3 hours of content (Note: If more than 3 contact hours were awarded for the activity, documentation demonstrating a minimum of 3 hours of content along with the schedule and advertising for the full activity must be submitted for review. The entire content of the activity must be maintained in the provider’s secure files with all other recordkeeping components.)

Instructional strategies used

Evidence of learner feedback mechanisms

Rationale and criteria for judging successful completion

Method or process used to verify participation of learners

Number of contact hours awarded for activity, including method of calculation (Provider must keep a record of the number of contact hours earned by each participant.)

Template of evaluation tool(s) used

Marketing and promotional materials

Means of ensuring content integrity in the presence of commercial support (if applicable)

Commercial Support Agreement with signature and date (if applicable)

Means of ensuring content integrity in the presence of sponsorship (if applicable)
Sponsorship Agreement with signature and date (if applicable)

Evidence of disclosing to the learner:
  - Purpose and/or objectives and criteria for successful completion
  - Presence or absence of conflicts of interest for all members of the Planning Committee, presenters, faculty, authors, and content reviewers
  - Sponsorship or commercial support (if applicable)
  - Non-endorsement of products (if applicable)
  - Expiration date (enduring materials only)
  - Evidence of verbal disclosure (if applicable)

Documentation of completion must include:
  - Title and date of the educational activity
  - Name and address of provider of the educational activity (Web address acceptable)
  - Number of contact hours awarded
  - Accreditation/approval statement
  - Participant name

Summative evaluation

List of participant names with unique identifier (Include a representative sample of data collected in the activity file to be reviewed. The provider must maintain all participant data in a safe and secure manner.)

Division of responsibilities among co-providers (if applicable)

Co-provider agreement with signature and date (if applicable)
CO-PROVIDING CONTINUING NURSING EDUCATION ACTIVITIES

ANCC Accredited Providers, Approved Providers, and Individual Activity Applicants may co-provide educational activities with other organizations. The co-providing organization may not be a commercial interest or sponsor. The ANCC Accredited Provider, Approved Provider, or Individual Activity Applicant’s Nurse Planner must be on the Planning Committee and is responsible for ensuring adherence to the ANCC accreditation criteria.

The ANCC Accredited Provider, Approved Provider, or Individual Activity Applicant is referred to as the provider of the educational activity. The other organization(s) is referred to as the co-provider(s) of the educational activity. In the event that 2 or more organizations are ANCC Accredited or Approved Providers, one will act as the provider of the educational activity and the other(s) will act as the co-provider(s).

The ANCC Accredited Provider, Approved Provider, or Individual Activity Applicant acting as the provider of the educational activity is responsible for obtaining a written co-provider agreement, signed by an authorized representative of the co-provider, that addresses the following:

- Name of ANCC Accredited Provider, Approved Provider, or Individual Activity Applicant acting as the provider
- The name(s) of the organization(s) acting as the co-provider(s)
- Statement of responsibility of the provider, including the provider’s responsibility for:
  - Determining educational objectives and content
  - Selecting planners, presenters, faculty, authors, and content reviewers
  - Awarding of contact hours
  - Recordkeeping procedures
Developing evaluation methods
Managing commercial support or sponsorship
Name and signature of the individual legally authorized to enter into contracts on behalf of the provider
Name and signature of the individual legally authorized to enter into contracts on behalf of the co-provider(s)
Date the agreement was signed
GLOSSARY

accreditation
The voluntary process by which a nongovernmental agency or organization appraises and grants accredited status to institutions and/or programs or services that meet predetermined structure, process, and outcome criteria (time-limited).

accredited provider
An eligible organization credentialed by ANCC after having submitted to an in-depth analysis to determine its capacity to provide quality continuing education over an extended period of time.

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.” (Nursing Professional Development: Scope and Standards of Practice, ANA, 2010)

approver unit
Comprises the members of an organization who support the approval of other organizations and/or continuing nursing education activities.

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, 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. Exceptions are made for nonprofit or government organizations and non-healthcare-related companies.

commercial support
Financial or in-kind contributions given by a commercial interest that are used to pay for all or part of the costs of a CNE activity. Providers of commercial support may not be providers or co-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.

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.” (Nursing Professional Development: Scope and Standards of Practice, ANA, 2010)
content expert
An individual with documented qualifications demonstrating education and/or experience in a particular subject matter.

content reviewer
An individual selected to evaluate an educational activity during the planning process 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.

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 career goals.

educational objectives
Derived from the overall purpose of the activity, educational objectives are written statements that describe learner-oriented outcomes that may be expected as a result of participation in the educational activity. These statements describe knowledge, skills, and/or attitude changes that should occur upon successful completion of the educational activity.

enduring materials
A non-live CNE activity that “endures” over time. Examples of enduring materials include programmed texts, audiotapes, videotapes, monographs, computer-assisted learning materials, or other electronic media that are used alone or with printed or written materials. Enduring materials can also be delivered via the Internet. The learning experience by the nurse can take place at any time and in any place rather than only at one time or in one place.
**gift in kind**

Nonmonetary support (e.g., marketing assistance, meeting room, event registration assistance) provided by the giver to the taker. (In the accreditation community, the “taker” is the provider of CNE.)

**in-service educational activities**

Activities intended to assist the professional nurse to acquire, maintain, and/or increase competence in fulfilling the assigned responsibilities specific to the expectations of the employer.

**learner-directed, learner-paced activity**

An educational activity in which the learner takes the initiative in identifying his or 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 also determines the pace at which the learning activity is engaged. Learner-directed activities may be developed with or without the help of others, but they are engaged in by only one individual.

**marketing materials**

Method of announcing an educational activity. This may include a brochure, flyer, bulletin board announcement, newsletter, memo, e-mail, Intranet posting, electronic message, or Web site.

**needs assessment**

The process by which a discrepancy between what is desired and what exists is identified.

**nurse planner**

A currently licensed RN with a baccalaureate degree or higher or international equivalent in nursing who is actively involved in all aspects of planning, implementation, and evaluation of each CNE activity. The Nurse Planner
is responsible for ensuring that appropriate educational design principles are used and processes are consistent with the requirements of the ANCC Accreditation Program.

outcomes
The impact of structure and process on the organization as a provider or approver and the value/benefit to nursing professional development.

planning committee
At least 2 individuals responsible for planning each educational activity; one individual must be a Nurse Planner and one individual must have appropriate subject matter expertise

process
For Accredited and Approved Providers, process is the development, delivery, and evaluation of CNE activities. For Accredited Approvers, process is the evaluation of providers of CNE and/or individual CNE activities.

provider unit
Comprises the members of an organization who support the delivery of continuing nursing education activities.

provider-directed, learner-paced
An educational activity in which the provider controls the content of the learning activity, including the learning objectives based on needs assessment, the content of the learning activity, the method by which it is presented, and the evaluation methods. The learner determines the pace at which the learning activity is engaged (examples include print article, self-learning module/independent study).
provider-directed, provider-paced
An educational activity in which the provider controls all aspects of the learning activity. The provider determines the learning objectives based on a needs assessment, the content of the learning activity, the method by which it is presented, and evaluation methods (examples include live activities, live Webinars).

purpose
Written outcome statement related to what the learner will be able to do at the conclusion of the activity (i.e., “The purpose of this activity is to enable the learner to...”).

relevant relationship
A relationship with a commercial interest is considered relevant if the products or services of the commercial interest are related to the content of the educational activity. Financial relationships with any commercial interest of the individual’s spouse/partner are considered to be relevant relationships.

resources
Available human, material, and financial assets used to support and promote an environment focused on quality CNE and outcome measures.

specialty
A concentration in an area of nursing that has standards and that reflects a well-defined base of knowledge within the overall discipline of nursing.

sponsor
An organization providing financial or in-kind contributions that does not meet the definition of a commercial interest.
**sponsorship**
Financial or in-kind contribution from an organization that does not fit the category of a commercial interest.

**target audience**
The group for which an educational activity has been designed.
REFERENCES


EDUCATIONAL DESIGN PROCESS
2013 Mini Manual

The American Nurses Credentialing Center (ANCC) Accreditation Program recognizes organizations that have demonstrated excellence in the ability to deliver continuing nursing education (CNE) or approve organizations or individuals that have demonstrated excellence in the ability to deliver continuing nursing education. The Accreditation Program is committed to ensuring the integrity of the accreditation process through systematic, evidence-based evaluation of application materials submitted by qualified applicants for Accredited Provider or Accredited Approver status. ANCC's Accreditation Program contributes to improving healthcare outcomes by providing a voluntary peer-review process that defines standards for high performance in providing quality CNE and measures compliance with those standards for organizations that elect to apply for accreditation.