

3-Step Disclosure Slides Sample

The following is a sample template of the 3-Step Disclosure process¹ for live accredited CPD activities, to be used at the beginning of the presentation.

All SPC members, speakers, moderators, facilitators, and other content contributors must declare their relationships *verbally and in writing* to participants.

- If part of a larger program with multiple sessions/speakers, the information about the program sponsors and SPC member disclosures can be presented once at the start of the overall program. Only the speaker/moderator disclosures are needed for each presentation/session in this case.

¹Adapted from the CFPC's 3-Step Process for the Identification and Management of Conflicts of Interest and Transparency to Learners, September 2019, online.

STEP 1: Disclosure of Financial Support

This program has received an educational grant from [name of organization(s)].

OR

This program has received in-kind support from [name of organization(s)].

OR

This program has received an educational grant and in-kind support from [name of organization(s)]. *(note: only use this statement for organizations that have provided both financial and in-kind support)*

OR

This program has received no external support.

Organizations must be listed in alphabetical order and in a font/size no larger or more prominent than the standard font used in the rest of the slide deck.

STEP 2: Faculty/Presenter Disclosures

	Faculty Name #1	Faculty Name #2	Faculty Name #3
Any direct financial payments including receipt of honoraria	Name of the for-profit or not-for-profit organization(s)	Name of the for-profit or not-for-profit organization(s)	Name of the for-profit or not-for-profit organization(s)
Membership on advisory boards or speakers' bureaus	Name of the for-profit or not-for-profit organization(s)	Name of the for-profit or not-for-profit organization(s)	Name of the for-profit or not-for-profit organization(s)
Funded grants or clinical trials	Name of the for-profit or not-for-profit organization(s)	Name of the for-profit or not-for-profit organization(s)	Name of the for-profit or not-for-profit organization(s)
Patents on a drug, product, or device	Name of the for-profit or not-for-profit organization(s)	Name of the for-profit or not-for-profit organization(s)	Name of the for-profit or not-for-profit organization(s)
All other investments or relationships that could be seen as having the potential to influence the content of the educational activity	Name of the for-profit or not-for-profit organization(s)	Name of the for-profit or not-for-profit organization(s)	Name of the for-profit or not-for-profit organization(s)

NOTE: each faculty member's disclosures must be declared for any and all relationships with for-profit and/or not-for-profit organizations over the past 2 years, regardless of content, regardless of topic being discussed. Where an individual has no relationships to disclose, indicate "None"

STEP 3: Mitigating Potential Bias

The following steps have been taken by the Physician Organization and the Scientific Planning Committee to help mitigate any potential sources of bias:

- *Explain how potential sources of bias identified in Step 1 and/or Step 2 of this process have been mitigated (see CCS Guidebook for Planning Committees Developing CPD Educational Activities for examples)*
- *This slide can be omitted if the faculty have no relationships that might pose a potential conflict-of-interest AND the program has been developed without external support*