



Transcript for The Alliance Podcast: Episode 35 – Live From #Alliance23: ‘Overcoming Disclosure Dilemmas 2023 Edition’

Voiceover: Welcome back to the Alliance Podcast. Are you still reflecting on all the amazing learnings and takeaways you brought back from the Alliance 2023 Annual Conference? Keep the conversation going with this episode of the Alliance Podcast, recorded live from National Harbor, Maryland, with Alliance Executive Director Kathleen Weis and conference presenter Karen Overstreet. Take it away, Kathleen.

Host, Kathleen Weis: Hello, and welcome back to the Alliance Podcast: Continuing Conversations. I'm Kathleen Weis, executive director of the Alliance for Continuing Education in the Health Professions. We're recording live from the Alliance 2023 Annual Conference in National Harbor, Maryland. So far, it's been wonderful to connect with the healthcare CPD community again. I'm excited to sit down with conference speaker Karen Overstreet, who just earlier today presented the session "Overcoming Disclosure Dilemmas 2023 Edition: Navigating Nuance and Context." Karen will share insights into navigating the new standards as well as some key learning she took away from presenting on this topic. Karen, welcome to the podcast.

Guest, Karen Overstreet: Thank you, Kathleen. I'm pleased to talk with you. It was a great session this morning.

Kathleen Weis: I heard it was quite the packed room as well. Standing room only is always a good sign.

Karen Overstreet: It absolutely is.

Kathleen Weis: So before diving into our discussion, Karen, tell us about your career in healthcare CPD and your involvement with the Alliance.

Karen Overstreet: Well, I stumbled into CPD and CME as so many of us did. I don't know anyone who set out to have a career in CME. I've heard people call it the accidental profession. I'm a pharmacist by training and became a medical writer, and from there stumbled into CME and have worked in a number of different provider organizations doing just about every role there is to do in CME. And I've been a very staunch advocate for the Alliance across my career. My first volunteer activity was editor of the *Almanac*, back when it was in print, and there was a single editor. The editorial board met once a year at the Annual Conference. And it was a labor of love for a while. I've been MECA chair, and I served two terms on the board of directors. I was chair of the Annual Conference in New Orleans. I'm thrilled we're going to be back there next year, but it was the year of Hurricane Katrina, so we had to pivot and very quickly move the conference from New Orleans to San Francisco. I've been a longtime member and supporter, and I'm thrilled to be here and see so many friends and colleagues in person.

Kathleen Weis: Well, it's lovely to be back for sure.

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Kathleen Weis: So we are in the middle of our first day of sessions at the 2023 Annual Conference. How has your experience been so far? Any favorite moments or key learnings you've had?

Karen Overstreet: My favorite moments definitely are just catching up with old friends and colleagues. It's so nice to see everybody, to be able to hug people again. I wish I had a nickel for every time I said it's been years since we've seen each other, but I think overall the crowd is enthusiastic. They're thrilled to be here. They're learning, they're networking, they're engaging. They're reconnecting. It's been a great experience so far.

Kathleen Weis: So let's talk about the session you just presented, "Overcoming Disclosure Dilemmas 2023 Edition." So can you share a high level description of this session for those who weren't able to attend or might need a little bit of a refresher?

Karen Overstreet: Sure. Well, it was a very important topic and a very complex one. Jan Schultz, one of my co-presenters, and I were in a number of conversations with providers earlier, several months ago, facilitated by the CME Coalition. We had a number of conversations with the ACCME about the new FAQs related to the new standards, particularly related to faculty who are owners or have an ownership interest in a startup organization. And what is the point when a startup enters the regulatory process? And there's been a lot of confusion around that. And the ACCME actually recommends in its new FAQs that providers learn about the regulatory process. And so that was the impetus for this session. Jan and I wanted to follow up on that discussion, and we brought in Andy Crim from a medical specialty society to round us out to really talk about what are some of the nuances. And it is very difficult because providers have different levels of risk tolerance, different resources among their staff. And so there really is no one right way to handle these disclosure dilemmas. But we had a very robust discussion, lots of free flowing ideas. And I think some of the key takeaways were that there is no one right way that we can all learn from each other. And to ask questions, the nuance, the context of each individual scenario is very important.

Kathleen Weis: Excellent. This session focused on three vexing issues of navigating those nuances. As you mentioned, from the new standards, determining eligibility versus ineligibility, whether the content of a certified activity is related to the business lines in an eligible company and methods to mitigate relevant relationships. Can you share one solution for addressing each of these issues?

Karen Overstreet: That's a great question. We've focused our time mainly on the first two of those three issues: determining eligibility and dealing with the disclosures, determining if the business lines are relevant to the content. Because there were so many questions, there was so much dynamic conversation, we really didn't spend a lot of time on mitigation. But from my perspective, the key takeaways are, to determine eligibility, understanding the regulatory milestones. And Jan, the Alliance President, one of my co-presenters, did a little tutorial on the process for drugs, biologics, biosimilars and medical devices. And I think that's an area that a lot of providers are not very familiar with. And some of it's very straightforward, but some of it's pretty darn complicated. And I think the Alliance could do our community a great service by doing more education on that. So again, key takeaway is, depending on which area you're working in, knowing what the regulatory milestone is. And, if you can't easily find that, ask the speaker, ask the faculty what stage of that process their startup or the organization that they



have relationships with it. And regarding business lines and relevance of content, we spent a lot of time talking about that. And that's an area where providers really vary in the skillsets that their staff has, how much time they can devote to playing detective to try to figure it out. And we encouraged folks to look at the ACCME's fairly new FAQs on this topic. And they give some guidance in where on the body, the issues, are the interests of the faculty in the same anatomic area, or are they different. And you could stop there if you want to. But in the example of lung cancer, there's early stage, there's metastatic disease, there's different types of therapies. So if a provider wants to spend the time and has the skills to do the research, you may be able to be a little more flexible, and determine that even though it's the same tumor type, the areas of content really are entirely different and can't influence or bias each other.

Kathleen Weis: So when it comes to disclosure dilemmas, do you have a best kept secret or a piece of advice that you always share when you're helping a colleague kind of navigate these new standards?

Karen Overstreet: Ask questions. Dig deeper. It's always helpful to look at the website of the organization that the faculty has a relationship with, and talk to the faculty. And I think the content is more important than the speaker, in general, for our learners. And it's not a horrible thing if we have to disqualify a faculty person. You know, there are plenty of experts out there. But asking questions and doing a little bit of homework, I think is key.

Kathleen Weis: Asking questions get you a long way, right?

Karen Overstreet: Absolutely.

Kathleen Weis: So during your session, did anyone bring up a specific scenario that stood out to you? And if so, can you walk us through it?

Karen Overstreet: Yeah, there was a great case study. It was a case-based session. One of my co-presenters presented a real-life case that he had dealt with. And it was a case of a very charismatic faculty member who said he'd done CME hundreds of times and he knew how to do everything, and it was sort of hard to rein him in. And this particular faculty, he was the chairperson, had a relationship with a commercial interest that changed over the course of developing this conference. And it looked like everything was going to be fine. And then when this particular society was up for reaccreditation, they got dinged for one session of a 40 session conference and had to do a progress report. And the key takeaway from me is, it's progress. It's not a horrible thing to get a progress report. It's an opportunity for improvement. And that's an opportunity to work with your CME committee, your planning committee, and reinforce to them how important these issues are. Because a lot of times to them, they don't get it. And in the context of their clinical work, they may not need to, but this is an opportunity to make a positive impact.

Kathleen Weis: Why does this topic matter for healthcare CPD professionals?

Karen Overstreet: We all have to deal with it, whether we get commercial support or not. We have to deal with disclosures. It's a critical issue. Nobody wants to wind up on the front page of *The New York Times*. And it can be challenging. And sometimes the faculty don't comply, they send things in late, or they give us things that are not relevant. But across the board all



providers have to deal with it. And so, I think this type of topic is really critically important and perhaps something that needs to be repeated year after year with updated examples.

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Kathleen Weis: So how can our learners continue to learn more about overcoming disclosure dilemmas beyond your conference session?

Karen Overstreet: I think ongoing conversation. And it was really interesting today that we had such a diverse group. We had members of every provider section, people in business development roles, content roles, accreditation, compliance roles, from very beginners to very experienced folks. And we can all learn from each other. I think that was evident in our session. But in this meeting, as a whole, we can all learn from each other. And being here together, asking questions, being open minded to learn from somebody who may have a different perspective is so helpful. And it comes back to asking questions.

Kathleen Weis: It always does, right? So Karen, thank you so much for joining us for today's discussion. It's really been lovely to connect with you in our community here at the Annual Conference. As we come to a close, do you have any final words of wisdom to share with our listeners?

Karen Overstreet: I'll repeat what I said just a few minutes ago. I think being open minded, being willing to talk to people from a different part of the CME/CPD world, asking questions, sharing ideas, asking for advice from somebody that you may not even have met before. That's one of the beauties of this community, everyone is so helpful and so open and so willing to share. And I would just encourage people to take advantage of that however they can.

Kathleen Weis: Absolutely, thank you again. And the session was extremely well attended. So congratulations to you on that one. And so I hope to see our listeners in Philadelphia, May 1–3, for those of you interested in the [Alliance Industry Summit](#). And thank you all again for listening to us, and we will talk with you soon. Thank you.

Voiceover: Thank you for joining us for another episode of the Alliance Podcast: Continuing Conversations. If you enjoyed this episode, remember to rate, review and subscribe to stay updated on future releases. In the meantime, we invite you to access our wealth of continuing professional development content on the *Almanac* at almanac.acehp.org. Until next time.