

*CSHP Board and Branch Reference Manual*

<b>CATEGORY: 4.2 Official Publications</b>	<b>PAGES: 9</b>
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<b>TITLE: Developing Official Publications</b>	<b>REVISED: May 2016 (Procedures) August 2015 (Policy and Procedures)</b>

## **POLICY**

There are three types of Official Publications, and any changes to these categories or their definitions shall be approved by Board:

- **Position Statements** succinctly express the stance of the Society on any issue related to the practice of pharmacy in a healthcare organization, such as a hospital. They describe a desired and achievable level of performance that is applicable to the practice of pharmacy in a healthcare organization, regardless of geographical location, experience, or area of practice.
- **Guidelines** are a collection of best practices or leading practices to describe a specific service, program or other aspect of a pharmacy practice; they are consistent with the spirit of the position statements.
- **Information Papers** provide a summary of the issues pertaining to a particular pharmacy topic, without specific recommendations or an outline of conduct.

Board reviews requests and recommendations received regarding the Official Publications and directs the development and publication of all Official Publications.

CSHP committees and task forces can recommend to Board the development, revision, or removal of an Official Publication.

The development and maintenance of an Official Publication follows a standard process depending on the type of Official Publication. This process provides the following elements:

1. Rules of authorship
2. Style guide
3. Writing process
4. Reviewing process
5. Approval process
6. Publication and distribution processes
7. Revision process (including the schedule of revision)

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The development of position statements includes a procedure to solicit broad stakeholder feedback from CSHP membership prior to Board voting on their adoption.

*This policy applies to CSHP National and all its branches.*

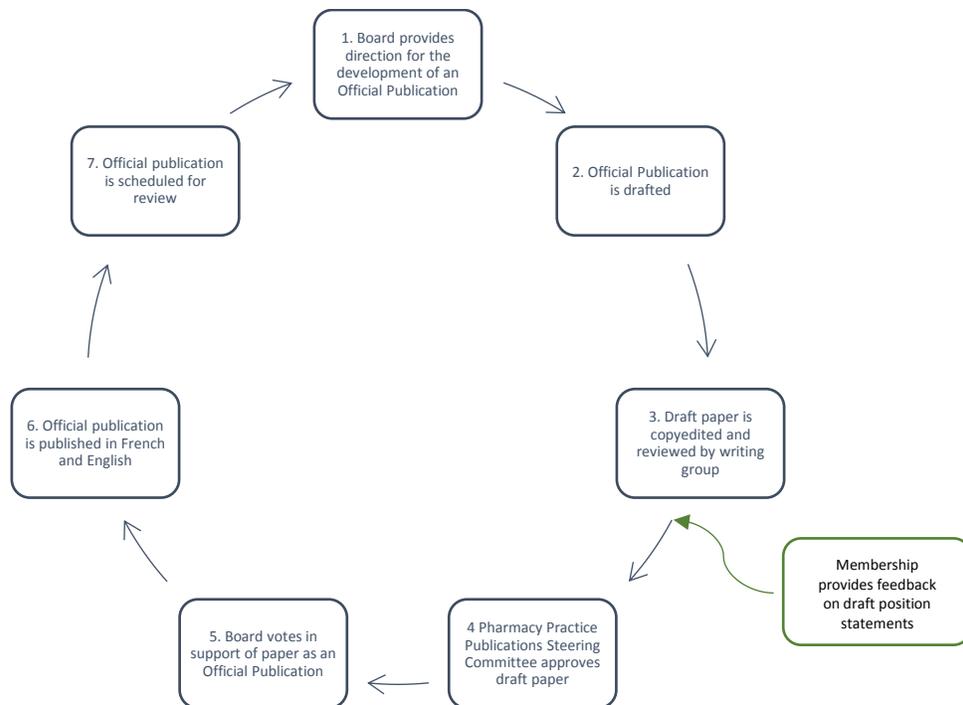
**DEFINITIONS**

None

**PROCEDURES**

Each Official Publication is developed in the following sequence, noting the following exceptions:

- Position statements are subject to membership feedback prior to Board voting on the statement.
- A background paper prepared for advocacy campaigns may be converted to an information paper, entering the process at stage 3.



Steps 1 to 5 and 7 are addressed in these procedures, and steps 5 and 6 are addressed in separate policies and procedures specific to those activities. The process to solicit membership feedback applies only to the development of position statements.

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1. Twice a year, the Pharmacy Practice Publications Steering Committee (P3SC) informs Board of the writing and review of CSHP Official Publications. Board may redirect the activities and priorities of the P3SC.
2. The P3SC solicits expert and/or interested CSHP members to write or review the Official Publication, under the direction of the P3SC. This group is referred to as the [insert name of publication] Development Team.

A call for writers/reviewers may be issued via the following means:

- a) Notice in the eBulletin
- b) e-announcement
- c) CSHP website (with email notification to the Coordinator of Professional & Membership Affairs)
- d) Notice to Pharmacy Specialty Network (PSN)
- e) Word-of-mouth

If the PSN is a CSHP Joint PSN, the majority of the development team must be CSHP members. Non-CSHP members of the PSN may contribute to the development of the Official Publication; however, only CSHP members of the development team may cast their vote regarding the approval of the draft Official Publication.

3. The chair of the P3SC chairs the development team. A CSHP member may volunteer to co-chair the development team, if warranted.
4. All writers and reviewers of CSHP Official Publications have access to *The CSHP Handbook for Writers and Reviewers of CSHP Official Publications*.
5. The chair of the development team is responsible for developing the paper and performs the following tasks:
  - a) Welcomes each member of the development team.
  - b) Provides a copy of the *CSHP Handbook for Writers and Reviewers of CSHP Official Publications*.
  - c) Asks for consent of each development team member to share his or her personal contact information (e.g., email address, phone number).
  - d) Asks each member to complete and provide the CSHP conflict of interest form and release of copyright form.
6. The Coordinator of Professional & Membership Affairs keeps records of all literature cited when each Official Publication is developed. (All members of the development team should forward a copy of literature that is cited and which is not readily available in a library or on the internet to the Coordinator of Professional & Membership Affairs.)
7. The copyeditor, Publications Administrator, and Coordinator of Professional & Membership Affairs use the *CSHP Handbook for Copyeditors of CSHP Official Publications* and the *CSHP Handbook on Formatting Official Publications*.
8. Procedural details for each type of CSHP Official Publication are given below.

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**Developing Standards and Guidelines**

1. The development team prepares a draft of the standard or guideline.
2. The chair of the development team provides regular updates to the P3SC regarding the work of the development team.
3. The Coordinator of Professional & Membership Affairs forwards the draft standard or guideline to the copyeditor, as needed.
4. The copyeditor performs the following steps:
  - a) Works with the Coordinator of Professional & Membership Affairs (and co-chair) to copyedit the document, and shows all suggested changes with the "track changes" feature, including any queries (for clarification of intended meaning or for style points).
  - b) Returns the copyedited document to Coordinator of Professional & Membership Affairs. Copyediting of guidelines may occur many times during the draft stages. The development team members are expected to sort out any differences of opinion among themselves. The copyeditor works with one agreed-upon copy and should not have to negotiate or arbitrate among differing requests.
5. If the development team includes a group of reviewers, that group critically examines the standard or guideline for content and submits all recommendations to the development team of writers via the Coordinator of Professional & Membership Affairs.
6. The development team of writers and reviewers ratifies the standard or guideline before the draft is provided to the P3SC. The development team votes on the draft of the standard or guideline. A majority of the development team must approve the draft before advancing to the next step. If a CSHP joint PSN was involved in the development of the standard or guideline, only CSHP members of the development team can vote.
7. The Coordinator of Professional & Membership Affairs forwards the copyedited document to the P3SC for review and comments. The review of the draft document by the P3SC involves the following steps:
  - a) Ensuring that the document is consistent with other CSHP official publications.
  - b) Determining if changes to other CSHP Official Publications are needed as a result of the writing of the standard or guideline.
  - c) Incorporating all responses, corrections, and changes into a single version.
  - d) Recording substantive issues with the content or message.
  - e) Recording in a separate document all consequential amendments required to existing publications arising from the writing of the new document. (This document is used to help prioritize the work of P3SC to make the needed changes.)If a substantive issue is identified that requires the input of the development team, the Chair of the P3SC liaises with development team.
8. The Coordinator of Professional & Membership Affairs forwards any changes recommended by the P3SC to the development team (writers and reviewers) for consideration.
9. Steps 1 through 8 are repeated as needed until the document is satisfactory to the P3SC and development team.

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10. The development team votes on the final draft of the standard or guideline. A majority of the development team must approve the draft before advancing to the next step. If a CSHP joint PSN was involved in the development of the standard or guideline, only CSHP members of the development team can cast their vote.
11. The Coordinator of Professional & Membership Affairs, Publications Administrator, and the copyeditor work together to ensure the draft publication is copyedited and formatted. A copy of the unformatted paper is kept as a Word document which the Publications Administrator forwards to the translator as part of the procedures to publish and distribute the paper as an Official Publication.
12. The P3SC recommends that Board approves the standards or guideline. Refer to the Board Approval of CSHP Official Publications policy and procedures.
13. The P3SC schedules the review of the approved standard or guideline within the four-year review cycle unless directed otherwise by Board.

### **Developing a Position Statement**

1. The development team drafts the position statement.
2. The Coordinator of Professional & Membership Affairs forwards the draft position statement to the copyeditor as needed.
3. The copyeditor completes the following steps:
  - a) Work with the Coordinator to copyedit the document and show all suggested changes with the "track changes" feature and include any queries (for clarification of intended meaning or for style points).
  - b) Return the copyedited document to the Coordinator of Professional & Membership Affairs.

Copyediting of the position statement may occur many times during the draft stages. The development team members are expected to sort out any differences of opinion among themselves. The copyeditor works with one agreed-upon copy and should not have to negotiate or arbitrate among differing requests.

4. The development team ratifies the draft statement before it is provided to the P3SC.
5. The Coordinator of Professional & Membership Affairs forwards the copyedited document to CSHP's Pharmacy Practice Publications Steering Committee for review and comments. The review of the draft document by the P3SC involves the following steps:
  - a) Ensuring that the document is consistent with other CSHP Official Publications.
  - b) Determining if changes to other CSHP Official Publications are needed as a result of the writing of the position statement.
  - c) Incorporating all responses, corrections, and changes into a single version.
  - d) Recording substantive issues with the content or message.
  - e) Recording in a separate document all consequential amendments required to existing publications arising from the writing of the new document. (This document is used to help prioritise the work of the P3SC to make the needed changes.) If a substantive issue

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is identified that requires the input of the originating development team, the chair of the P3SC liaises with the chair of the development team.

6. The Coordinator of Professional & Membership Affairs forwards any changes recommended by the P3SC to the development team for consideration.
7. Steps 1 through 6 are repeated as needed until the document is satisfactory to the majority of the development team.
8. The development team votes on the final draft of the position statement. A majority of the development team must approve the draft before advancing to the next step. If a CSHP Joint PSN was involved in the development of the position statement, only CSHP members of the development team can vote.
9. The Coordinator of Professional & Membership Affairs provides the draft position statement to Board for their information.
10. The Coordinator of Professional & Membership Affairs asks CSHP membership to provide feedback on the position statement.
  - a) The Coordinator of Professional & Membership Affairs and the chair of the development team create the following documents:
    - i) A brief survey questionnaire asking the membership to provide their opinion and comments on the draft position statement.
      - The questionnaire should include a brief introduction to the survey.
      - A five-point Likert scale should be used which gives the following options:
        - Strongly disagree
        - Disagree
        - Neither disagree nor agree
        - Agree
        - Strongly agree
      - The member is not obliged to respond to the comment section of the survey.
    - ii) An introduction to the draft statement to be posted on the CSHP webpage, which includes the URL to the online survey.
    - iii) An e-announcement inviting members to read and provide their input on the draft statement, providing the URL to the statement posted on the CSHP's website and the closing date of the survey (four weeks after the e-announcement is sent).
    - iv) A reminder e-announcement.
  - b) The Coordinator of Professional & Membership Affairs forwards the following documents to the Web Administrator:
    - i) e-announcement.
    - ii) Reminder e-announcement.
    - iii) Introduction to the draft position statement.
    - iv) Draft statement.
    - v) Proposed dates for the e-announcement and the closing of the online survey tool.

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Refer to the templates of these documents.

- c) The Web Administrator completes the following activities:
  - i) Post the draft position statement on the Draft Statements page of the Official Publications section on CSHP's website according to the following requirements:
    - The position statement is available only to members.
    - The introduction to the statement is to be placed before the statement.
    - The position statement includes the URL to the online survey tool at the end of statement document. (The URL appears twice: in the introduction and at the end of the statement.)
  - ii) Issue the e-announcement.
  - iii) Issue the reminder e-announcement one week before the survey closing date.
  - iv) Remove the draft position statement from the CSHP webpage at the close of the survey.
11. At the close of the survey, the Coordinator of Professional & Membership Affairs completes these activities:
  - a) Ensures access to the survey tool is closed.
  - b) Extracts the survey results from the online survey tool, including the comments.
  - c) Compiles the results.
  - d) Shares the results with the chair of the development team.

The results are not considered a vote, so a majority of the survey responders is not required for the statement to advance.
12. The Coordinator of Professional & Membership Affairs and chair(s) of the development team consider the need to revise the draft position statement in light of the survey results.
13. The chair of the development team shares the survey results with the development team.
14. The development team revises the statement, if needed. All changes are approved by the majority of the development team. If a CSHP Joint PSN was involved in the development of the statement, only CSHP members of the development team can cast their vote.
15. The Coordinator of Professional & Membership Affairs, Publications Administrator, and the copyeditor work together to ensure the draft publication is copyedited and formatted. A copy of the unformatted paper is kept as a Word document which the Publications Administrator forwards to the translator as part of the procedures to publish and distribute the paper as an Official Publication (for editorial style, design, and formatting style).
16. The P3SC recommends that Board approves the position statement. Refer to the Board Approval of CSHP Official Publications policy and procedures.
17. The Coordinator of Professional & Membership Affairs (and the chair of the development team) evaluates the membership consultation process. The evaluation should include:
  - a) Number and percentage of responders to the survey.
  - b) Effect of the survey responses on the final position statement.
  - c) Comments provided by responders about the input process.

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18. The Coordinator of Professional & Membership Affairs includes the results of this evaluation in the next P3SC regular report submitted to Board.
19. The P3SC schedules a review of the approved statement within the four-year review cycle unless directed otherwise by Board.

### **Developing an Information Paper**

1. The development team drafts the information paper. A background paper prepared for an advocacy campaign may be converted to an information paper.
2. The Coordinator of Professional & Membership Affairs forwards the draft paper to the copyeditor, as needed.
3. The copyeditor completes the following steps:
  - a) Work with the Coordinator of Professional & Membership Affairs to copyedit the document and show all suggested changes with the "track changes" feature and include any queries (for clarification of intended meaning or for style points).
  - b) Return the copyedited document to the Coordinator of Professional & Membership Affairs.

Copyediting of the information paper may occur many times during the draft stages. The development team members are expected to sort out any differences of opinion among themselves. The copyeditor works with one agreed-upon copy and should not have to negotiate or arbitrate among differing requests.

4. The development team ratifies the information paper before the draft paper is provided to the P3SC. The development team votes on the final draft of the information paper. A majority of the development team must approve the draft before advancing to the next step. If a CSHP joint PSN was involved in the development of the statement, only CSHP members of the development team can vote.
5. The Coordinator forwards the copyedited document to the P3SC for review and comments. The review of the draft document by P3SC involves the following steps:
  - a) Ensuring that the document is consistent with other CSHP Official Publications.
  - b) Checking if changes to other CSHP Official Publications are needed as a result of the writing of the information paper.
  - c) Incorporating all responses, corrections, and changes into a single version.
  - d) Recording substantive issues with the content or message.
  - e) Recording, in a separate document, all consequential amendments required to existing publications arising from the writing of the new document. (This document is used to help prioritise the work of P3SC to make the needed changes.)If a substantive issue is identified that requires the input of the originating development team, the chair of the P3SC liaises with the chair of the development team or the development team.
6. The Coordinator of Professional & Membership Affairs forwards (via the chair) any changes recommended by the P3SC to the development team for consideration.

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7. Steps 1 through 6 are repeated as needed until the document is satisfactory to the majority of the development team.
8. The development team votes on the final draft of the information paper. A majority of the development team must approve the draft before advancing to the next step. If a CSHP Joint PSN was involved in the development of the statement, only CSHP members of the development team can cast their vote.
9. The Coordinator of Professional & Membership Affairs, Publications Administrator, and the copyeditor work together to ensure the draft publication is copyedited and formatted. A copy of the unformatted paper is kept as a Word document which the Publications Administrator forwards to the translator as part of the procedures to publish and distribute the paper as an Official Publication (for editorial style and design and formatting style).
10. The P3SC recommends that Board approves the information paper. Refer to the Board Approval of CSHP Official Publications policy and procedures.
11. The P3SC schedules a review of the approved information paper in the four-year review cycle unless directed otherwise by Board.

**REFERENCES**

None

**FORMS**

None