

# **STANDARDS**

## **For Affiliate Programs**

**V.26**

**The Jefferson Ultrasound**  
Research and Education Institute

**STANDARDS**  
**for training programs affiliated with**  
**The Jefferson Ultrasound Research and Education Institute**

The Jefferson Ultrasound Research and Education Institute (JUREI) is committed to providing support for development of high-quality ultrasound services throughout the world. To accomplish this goal, the Ultrasound Institute has established a program of affiliation with ultrasound training centers world-wide. The Institute participates in the establishment of new affiliate centers, or recognizes existing programs which meet certain criteria.

The following "STANDARDS" must be fulfilled for a program to be accepted as an affiliate. The "Comments" elaborate on the standards and provide more concrete examples of how the standards may be met.

**STANDARDS:**

**In order to qualify as an affiliate of the Jefferson Ultrasound Research and Education Institute, the applicant must submit a formal written application for affiliation with the Ultrasound Institute of Thomas Jefferson University. The application must provide evidence of:**

*Qualifications of the Program Director*

**1 Recognition and support of the existing or proposed program by the government of the host country or by an established academic or health-care institution or organization**

Comment: The Institute respects the rights and prerogatives of the government of the host country and expects the affiliate institution to meet appropriate requirements of the governing body of the host country. Recognition of a candidate program usually takes the form of a letter of association, approval and/or support from a government agency, university, or hospital. The strongest form of recognition is documentation of commitment of faculty time and institutional space (recommend a minimum of 20% of Program Director's time).

**2. Appropriate training and experience to teach medical diagnostic ultrasound**  
**2.1 Program Directors must hold the MD degree or equivalent**

Comment: This standard is intended to assure that the Program Director has sufficient knowledge, skill, and respect from the local medical community to serve as both Director and Instructor in the program. Applicants who do not meet the full standards will be considered on a case-by-case basis, and would require outstanding qualifications in other areas in order to be accepted. A curriculum vitae and letters of recommendation must be submitted by the Program Director, along with verification of professional education and qualifications. **Do not send original documents**, send only photocopies.

**and must provide evidence of:**

**a. Authorization by the local Governmental and medical authorities to practice medicine in his/her region or country.**

Comment: Submit verification of credentials including license to practice medicine in the locality where the affiliate program will be conducted.

**b. Recognition by his/her country's peers as a specialist in ultrasound.**

Comment: Recognition is usually in the form of invitations to be a guest speaker at the local ultrasound society or other venues, papers published, and memberships and committee

activities related to ultrasound. This information may be provided in the form of a curriculum vitae.

**c. Five or more years of clinical experience in ultrasound, and**

d. Substantial teaching experience, and

e. Substantial day to day participation in the conduct of the training program

Comment: The Program Director must have direct involvement in the daily activities of the program. "Involvement" is defined in terms of direct teaching contact with the students, in addition to any planning or administration activities required for the operation of the Affiliate Program. "Teaching contact" may include demonstrations of ultrasound technique, lectures, or instruction of students through observation of clinical procedures.

**f. Fluency in spoken and written English**

Comment: For those Program Directors and faculty who are not native English speakers, TOEFL or similar language testing is required before admission to the Jefferson Ultrasound Research and Education Institute for training.

**g. Freedom from any conflict of interest**

Comment: The Program Director and any faculty members must not be an employee of or have a retained consultant relationship with ultrasound distributing or manufacturing companies, may not actively promote a specific "brand" of ultrasound machine, and must avoid real or apparent conflict of interest at all times. The Program Director must demonstrate high moral character and be above ethical questioning at all times.

**3. Completion of a minimum training period in residence at Thomas Jefferson University or equivalent.**

**3.1 The minimum training required is based on the prior training and experience of the individual :**

- a. **3 months in residence at JUREI for individuals with a degree in medicine or an allied health field, and 1 or more years of clinical experience in ultrasound, and documented teaching experience, or**
- b. 5 or more years of clinical experience in diagnostic ultrasound, and extensive documented teaching experience in ultrasound

Comment: In order to assure consistency of training and standards, all Program Directors of affiliated training programs must complete a minimum period of training (a visiting fellowship) at the Jefferson Ultrasound Research and Education Institute. This visiting fellowship is usually 3 months in duration but may be longer or shorter as determined by the Institute's assessment of the applicant's training and experience. Tuition fees for the visiting fellowship are usually waived or are covered by grants or scholarships, but transportation and living costs are the responsibility of the visiting fellow or his/her sponsor.

***The physical facilities required to support a educational program***

4. Facilities to house the program including

**4.1 classroom with appropriate seating and work surfaces**

4.2 Electrical supply sufficient to operate A-V equipment and ultrasound instruments

Comment: Facilities may vary greatly from country to country. However, at a minimum, adequate classroom space must be set aside for use by ultrasound students during the periods when they receive lectures. Classroom and Audio Visual equipment may be shared with other programs when their resources are not in use for the ultrasound program.

**5. Availability of audio-visual equipment in quantities appropriate for the physical facility, anticipated enrollment, and for independent learning.**

**Equipment must include:**

**5.1 two projectors for 35 mm slides**

5.2 equipment for classroom display of the video-out signal from an ultrasound scanner (36" monitor or video projector)

5.2 At least two VHS video tape players and monitors for independent study of JUREI videotapes

5.3 blackboard/whiteboard or equivalent

Comment: Dedicated space must be provided for viewing of videotapes during self directed study. The optimum ratio is one video tape viewing station for every three students accepted into each class.

Comment: Some Affiliate Centers begin their training programs without video projection or video tape viewing equipment. This is acceptable as a temporary arrangement, but appropriate equipment should be obtained as soon as possible.

**6. Availability of textbooks, syllabi and other printed materials in quantities appropriate for the anticipated enrollment and subject matter of the training program**

Comment: A library of texts and reference books must be available for the use of course participants. This library must be on-site or close to the location where the classes are held (ultrasound texts held by a library that is more than 100 meters distant from the training site will not be accepted in fulfillment of this requirement). Text and reference books must be up to date and must address the specific subject matter taught in the ultrasound program. Current journals (including the Journal of Ultrasound in Medicine or an equivalent scientific journal dedicated to ultrasound) should be part of this library. A full listing of the available library books and other teaching materials must be submitted with the affiliation application. A syllabus of relevant support material must be provided to course participants in each course. This requires that printing and copying services be readily available.

**7. Ultrasound scanners for practicum training in a ratio no greater than one instrument to 5 trainees**

Comment: Didactic training in the affiliate program must be accompanied by practicum training in scanning. One instrument may be used to serve the needs of more than 5 trainees, if practicum training is performed in shifts. Instructors must be qualified to perform scanning training, and sufficient time must be scheduled for one-on-one instruction of each trainee. Initial training may be performed on live models in the classroom setting. Such training must be objective and competency based, not simply demonstration by a lecturer. It is highly desirable that the majority of practicum training be performed in the clinical environment with patients. Complete documentation must be maintained on practicum instruction received by each participant. The documentation is usually in the form of a log of scans completed and cases observed. Such logs are usually kept by the trainee and countersigned by the instructor/sonologist for each case.

***Policies and procedures which facilitate program operation***

8. Financial documentation which demonstrates that:

**8.1 tuition is reasonable for the local economy**

8.2 surplus funds are reinvested for improvement of the program

8.3 good accounting practices are followed

8.4 a reputable agency, independent of the program, provides auditing of the program financial accounts

Comment: Ultrasound Institute affiliated programs are intended to benefit the populace of the nations in which the programs are established. All affiliated programs must have a budget, use good accounting practices and must reinvest a reasonable proportion of surplus funds in expansion and improvement of the program. A reasonable level of tuition may be charged for trainees (if permitted by the government and social structure of the country), and the Program Director and any staff may be paid from funds acquired through tuition payments. Payments for teaching services or honoraria for guest speakers must be reasonable and appropriate for the economy in which the program exists. Periodically, staff of the Ultrasound Institute or a designee will perform on-site assessment and audit of affiliate programs financial records. It is expected that the majority of any surplus funds will be invested directly in operation and expansion of the Affiliate Center program.

**9. Policies and procedures which affirm a deep commitment to providing equal educational opportunities for all persons, without discrimination.**

New programs may meet this requirement by submitting a statement that the program will adhere to the above commitment. When audited a affiliate program must be able to show that approximately equal numbers of males and females have been admitted to the training, and that there is no evidence of discrimination related to any other classifications.

**10. Procedures which will assure thorough and accurate records of attendees and the work accomplished by each attendee.**

The affiliate program must have a standard registration form which includes at least the following:

- name, age, sex, and a complete mailing address
- telephone number (home and work), fax, or other number if available, e-mail
- professional licensure and area of medical specialty
- courses and dates for which registering
- source of funding (personal, institutional, commercial, government, other)

The affiliate program must have a defined requirement for attendance of scheduled class sessions in order for a participant to receive a certificate. The recommended requirement is 90% attendance of scheduled classes, with the option for the affiliate faculty to provide make up sessions as needed.

The standardized post tests developed by the Institute must be administered to attendees at the end of the training program and answer sheets must be sent to the Institute for scoring. The same examination may be used as a pre-test if so desired by the Program Director. The answer sheets must be accompanied by a summary of the demographic information on each registrant, sufficient for the Institute to contact each individual as required for oversight of Affiliate program practices. The test scores will serve as a quality control mechanism. The affiliate is expected to develop its own examinations for use within the program and will be given an opportunity to modify the Institute's standardized post test to better reflect medical conditions and practice in the Affiliate Center's region.

A standard graduation certificate must be provided by the local affiliate to each attendee who completes the program with satisfactory performance as defined in the affiliate's informational literature. Attendees who meet minimum standards for post test performance as established by the Institute will receive an Institute certificate recognizing their accomplishment.

Records of attendees and program content must be maintained for a minimum of 5 years. Annual summary reports of affiliate program activities must be provided to the Institute for review.

**11. Award of affiliate status by JUREI may be withdrawn at any time and for any reason deemed appropriate by the director of the Institute. In the event that affiliate status should be withdrawn or not renewed, the affiliate program, its officers, sponsors and faculty agree that no further reference shall be made to JUREI or Thomas Jefferson University in advertisements or correspondence.**

Individuals who wish to apply for affiliation with the Ultrasound Institute must submit documents which address the above items. Documentation should be in the form of photocopies, do not send original documents. All application materials will be retained by the Institute. Programs or proposed programs which meet Institute standards are offered a contractual relationship with the Institute for a period of 1 year for new programs, and up to 3 years for established programs. Renewal of the Affiliation contract requires submission of reports of program activity and financial data which are satisfactory to Institute examiners.

Affiliate programs may receive JUREI teaching materials in the form of video tapes, slides and textbooks as needed to supplement materials already incorporated into the program. Ultrasound Institute staff will provide guidance for development of optimal curriculum and testing materials and will provide on-site guest lectures at the affiliate site when possible. Staff and graduates of affiliated programs are extended a discount on tuition fees for Institute courses and visiting fellowships.

Programs which are recognized by the Ultrasound Institute as affiliates are permitted to use the JUREI logo and the words "Affiliate of the Jefferson Ultrasound Research and Education Institute" in advertisements and announcements. All use of the JUREI logo must receive prior approval from JUREI.

## Application Check sheet

***NOTE: Submit photocopies of documents, NOT ORIGINALS. The Institute will not be responsible for return of originals to the applicant.***

Application for affiliation with the Jefferson Ultrasound Research and Education Institute (JUREI) requires that the applicant provide all of the following items in the application package. If in doubt as to the material required, please contact the manager of the Institute at (215) 955-6395 or *e-mail* Larry Waldroup at Internet address Larry.Waldroup@mail.tju.edu or via conventional mail at  
Larry Waldroup  
Division of Ultrasound, 763G Main  
Thomas Jefferson University Hospital  
132 South 10th Street  
Philadelphia, PA 19107-5244

If certain items required by the checklist are not available, applicants are encouraged to write a clear explanation as to why the item cannot be submitted, and include this explanation with the formal application. We will review the application materials and advise you of additional materials which may be required before final processing.

There is no charge for an application for affiliation with JUREI.

Application requires the following materials:

1. Letters of support and recommendation from one or more of the following:  
government agency or office  
professional society (such as the local ultrasound society)  
university or medical school  
organization such as guild or labor union  
or  
records showing that you have an established program which has graduated students for more than one year  
or  
records showing that you have a business license from a government agency and that the proposed activity of ultrasound training falls within the scope of your business activities.

In general, this requirement is very flexible, and is intended only to assure that a proposed affiliate is a legitimate activity conducting its affairs in a civil and lawful manner. However, strong endorsements from a government agency, university or ultrasound society will count significantly in our selection should there be multiple applicants for affiliate in a single region.

2. Curriculum vitae and at least two letters of recommendation for the Program Director. Curriculum vitae must also be submitted for any individual designated as faculty but letters of recommendation are not required for faculty.
3. Medical credentials of the Program Director of the program
4. Evidence that the Program Director is known and respected by the local ultrasound community. This evidence may take the form of awards, certificates, letters of appreciation, copies of programs at which the Program Director was an invited guest

speaker, papers published etc. The curriculum vitae may also be used to fulfill this requirement if it lists some or all of the above items.

5. Documentation of five or more years of clinical experience in ultrasound (specify when you first began using ultrasound).
6. Documentation of teaching experience of the Program Director and any key faculty who will be regularly teaching in the program.
7. A description of the exact role that the Program Director will have in the program. Be specific about the number of hours per week in which the Program Director will be in direct contact with the students (i.e. lecturing, conducting case analysis, conducting seminars, one-on-one counseling etc.). Do not include time spent planning, assessing or marketing the program. Also, explicitly state who is responsible for each component of the program, including marketing, selection of candidates, lecturing on each program topic, written examinations, records-keeping, and outside contacts between the program and other organizations.
8. Documentation of fluency in spoken English and the ability to both read and write English at a level acceptable for a university graduate. This documentation is not necessary if the applicant is known to Institute staff or is a native English speaker.
9. A letter from the applicant Program Director to JUREI stating that the Program Director is qualified to conduct the training program and is free from any conflict of interest. Such conflict of interest might include being employed by an ultrasound manufacturer or vendor, or promoting or advertising manufacturer's equipment in return for payment.
10. A narrative description of the physical facilities which will be used for the program. Include a description of the space (room size, furnishings etc.), the hardware (projectors, VCRs, television monitors, blackboards, view boxes, computers, teaching files etc.) and the facility in which the space is located (general information on the university or medical school if such is involved). Include a few photographs if at all possible.
11. An inventory list of teaching materials (books, articles, atlases, teaching files etc.) possessed by or consistently available to the training program. Do not include materials available in the university library or other general-access site. The list should be sufficiently complete to allow the Institute staff to evaluate both the quantity and quality of the teaching materials and the completeness of the reference library.
12. A detailed listing of the ultrasound equipment available to the students during the training program. Include the manufacturer, model number, serial number, date acquired, who owns the device, whether it has Doppler and what transducers are associated with it (give MHz, type and radius if curvilinear, and focus depth if fixed focus). Also indicate the location of the equipment (hospital, clinic, manufacturer's offices, private practice office etc.)
13. A financial pro forma which states the following for the first year of the proposed program or the most recent year for an established program:  
Revenue  
    Tuition  
    Other income (specify sources)

(or) funding received from sponsoring institution

Expenses

- Salaries, wages, honoraria and other personnel costs
- Rental or other charges associated with the space or equipment
- Teaching materials (books, slides etc.)
- Subscriptions and fees
- Printing and copying
- Other supplies
- Maintenance and repair of equipment
- Capital equipment (purchase of new hardware such as projectors, VCR's, furnishings, any other durable goods)
- Marketing
- Communications Telephone
- Postage
- Taxes, fees or other charges

14. A statement, signed by the Program Director specifying how funds generated by the program will be used. If the program will be operating in an environment where tuition is not charged, then indicate that there is no revenue as such, and that all expenses will be covered by the sponsoring institution. It is important that we understand what financial benefit, if any, the Program Director and any staff will derive from the program, and what institutional "tax", if any, the program will be supporting.
15. A statement, signed by the Program Director, agreeing to abide by the nondiscrimination policy set forth in the "Essentials". Include in the statement a specific plan for how you intend to implement nondiscrimination.
16. List the records which are, or will be, kept on each student.
17. Provide written policy statements on the following:
  - Required attendance for receipt of a certificate (how many absences allowed)
  - Policies on payment of tuition (is advance payment required, are delayed payments possible, are scholarships available)
  - Policies on distribution of information (how do students know what options are available to them? Is there a guide-book for students? Do you advertise the program? If so, where and how often?)
  - Policies on selection of students (how students are selected, who makes the decision to admit or reject a applicant, what rules are followed in the decision making process)
  - Objectives for the program and how you test achievement of those objectives (in addition to the pre and post test required by the Institute)
  - How do you obtain student evaluations of your program? How are the results of these evaluations incorporated into your program design?
  - How do you determine that the program meets the needs of your society
18. For programs which are already established, provide copies of the most recent advertisements or announcements used to notify potential students of the availability of the program. Provide English translations of any documents which are not in English.

--End--