

# DOCUMENTATION OF THE PLANNING PROCESS FOR A CONTINUING MEDICAL EDUCATION ACTIVITY

INSTRUCTIONS: DOUBLE-CLICK ON AUTOFILL BOXES TO INSERT TEXT OR CHECK BOXES

Job Number: Job Name:	
Target Audience:	
Planning Committee Members and contact info:	
Date of Submission:	
Proposed Sources of Funding:	<input type="checkbox"/> Commercial Support [enter name(s) of manufacturers]: <input type="checkbox"/> Tuition (amount \$ )
Proposed CME credits for this activity (rounded to nearest ¼ pt)	
Collaborative Partners and contact information (if applicable)	

**1. Screening Criteria (NOTE: *If you cannot check these boxes, reconsider the need for this educational intervention!*)**

- Content is based on evidence that constitutes “best practices”
- Gap exists between current and best practices
- Closing the gap will result in improvement in the health and/or outcomes of patients
- The proposed educational intervention will result in changes in current practice

**2. Identifying Gaps in Knowledge and/or Performance and Integrating Them with Other Relevant Needs**

In accordance with our CME Mission, this educational activity will address (1) physician competencies, and/or (2) physician performance-in-practice, and/or (3) patient outcomes.

To identify learner gaps, planners should interview a small number of targeted learners to gain an understanding of the problem as seen from the perspective of the learner. Other methods may be used as well. Check the sources / mechanisms used to identify this gap [qualitative processes (in italics) produce the best information]:

- Focus Panels*
- Survey of Targeted Learners
- Peer Reviewed Literature
- Key Opinion Interviews*
- Previous Evaluation/Outcomes Measurement Summaries (**NOTE:** Attach documents that confirm the identified needs)

Other sources of needs used to complete the needs assessment for this activity were:

- National guidelines or specialty society guidelines       Expert opinion from course chair or faculty

### 3. Application of Identified Gaps to Planning Content

Based on the above, please summarize the needs identified and results you intend for learners. The desired results are “best practices”. They are what learners will apply to their practice based on the knowledge and implementation strategies addressed in this activity. Please list each final need (add more lines if necessary) together with the result you intend relative to that need, and check the appropriate Content Focus box: knowledge, performance, competence, or patient outcomes.

IDENTIFIED GAP WHAT ARE THE LEARNERS' NEEDS?	DESIRED RESULTS	CONTENT FOCUS
		<input type="checkbox"/> Knowledge <input type="checkbox"/> Competence <input type="checkbox"/> Performance <input type="checkbox"/> Patient outcome
		<input type="checkbox"/> Knowledge <input type="checkbox"/> Competence <input type="checkbox"/> Performance <input type="checkbox"/> Patient outcome
		<input type="checkbox"/> Knowledge <input type="checkbox"/> Competence <input type="checkbox"/> Performance <input type="checkbox"/> Patient outcome

### 4. Physician Competencies and Attributes

Competencies and Attributes are national goals for physicians associated with the targeted specialty(ies) that should be addressed whenever possible in planning CME.

Based on the Maintenance of Certification (MOC) competencies designated by the American Board of Medical Specialties (ABMS), which competency areas will you address in this CME activity? Check all that apply (see the appropriate specialty board’s criteria for each area as they are additional needs to include in your planning for this activity ([http://www.abms.org/About\\_ABMS/member\\_boards.aspx](http://www.abms.org/About_ABMS/member_boards.aspx))).

ABMS Competencies	Strategies Incorporated into the CME Activity
<input type="checkbox"/> <b>Patient care</b> <i>(Provide care that is compassionate, appropriate and effective treatment for health problems and to promote health)</i>	
<input type="checkbox"/> <b>Medical knowledge</b> <i>(Demonstrate knowledge about established and evolving biomedical, clinical and cognate sciences and their application in patient care)</i>	
<input type="checkbox"/> <b>Practice-based learning and improvement</b> <i>(Able to investigate and evaluate their patient care practices, appraise and assimilate scientific evidence and improve their practice of medicine)</i>	
<input type="checkbox"/> <b>Interpersonal and communication skills</b> <i>(Demonstrate skills that result in effective information exchange and teaming with patients, their families and professional associates (e.g. fostering a therapeutic relationship that is ethically sound, uses effective listening skills with non-verbal and verbal communication; working as both a team member and at times as a leader)</i>	
<input type="checkbox"/> <b>Professionalism</b> <i>(Demonstrate a commitment to carrying out professional responsibilities, adherence to ethical principles and sensitivity to diverse patient populations)</i>	



**EXAMPLES OF A CONDITION, CONTENT STATED IN TERMS OF PERFORMANCE, AND A STANDARD**

DOMAIN	EXAMPLE
Knowledge	"Evaluate treatment options for an adolescent patient with depression so that suicidal ideation is eliminated."
Skill	"Obtain a 3 second rhythm strip from an attached esophageal ECG lead with minimal electrical interference."
Attitude	"For your patients with bone metastases, counsel on treatment options to improve quality of life".

- CONTENT STATED IN TERMS OF PERFORMANCE
- THE CONDITION
- THE STANDARD

**LEARNING OBJECTIVES FOR THIS ACTIVITY ARE (USE AS MANY LINES AS NECESSARY):**

Objective 1:
Objective 2:
Objective 3:
Objective 4:

### 7. Faculty Selection

Faculty that you select should have a demonstrated expertise in the therapeutic field, strong presentation and communication skills, and ability to address the needs and objectives expressed in this planning document. You should select faculty with the most expertise and teaching skills and the least amount of conflicts of interest. Faculty chosen to achieve the objectives of this activity and their qualifications are (add more lines as necessary):

FACULTY NAME	TITLE AND AFFILIATION	QUALIFICATIONS

### 8. Selection of Evaluation (including Outcomes Evaluation Assessment) Tools

Evaluations are tools used to determine if the result you intended for learners has actually been achieved. The choice of which evaluation tools to use depends on (1) the goal of the activity (i.e., knowledge transfer, competency), (2) the mode of education and applicability of the tool (i.e., live activity, Internet, print), and (3) available resources. Please indicate the evaluation tools selected for this activity and the rationale for their selection:

METHOD SELECTED	RATIONALE FOR MAKING THAT SELECTION
<input type="checkbox"/> Postactivity Evaluation <i>(measures learner satisfaction)</i>	
<input type="checkbox"/> Pre-Post Test <i>(measures immediate learning)</i>	
<input type="checkbox"/> Learning Contract <i>(commitment-to-change question)</i>	
<input type="checkbox"/> Audience Response System <i>(identifies if learners understand content and provides learning reinforcement)</i>	
<input type="checkbox"/> Focus Group <i>(qualitative measurement to seek more in-depth information)</i>	
<input type="checkbox"/> Post Test <i>(measures transfer of knowledge)</i>	
<input type="checkbox"/> Case discussions or vignettes <i>(measures application of knowledge to practice, or competence)</i>	

### Preparation of Outcomes Questions

Outcomes surveys (or another outcomes tool, such as a focus panel) will be sent to learners or conducted with learners several months post-activity (you determine the timeframe based on your judgment of time needed to achieve practice-based implementation). Based on the “Desired Results” stated previously in Section 3, please prepare an outcomes question for each objective and/or expected result (add lines as needed):

### PREPARATION OF YOUR OUTCOMES QUESTIONS/APPROACH

OUTCOMES QUESTION	THIS OUTCOME RELATES TO . . .
	<input type="checkbox"/> Increased Knowledge <input type="checkbox"/> Improvement in Competency <input type="checkbox"/> Enhanced Performance <input type="checkbox"/> A Better Patient outcome
	<input type="checkbox"/> Increased Knowledge <input type="checkbox"/> Improvement in Competency <input type="checkbox"/> Enhanced Performance <input type="checkbox"/> A Better Patient outcome
	<input type="checkbox"/> Increased Knowledge <input type="checkbox"/> Improvement in Competency <input type="checkbox"/> Enhanced Performance <input type="checkbox"/> A Better Patient outcome

## 9. System/Educational Barriers and Opportunities

Planners are encouraged to give consideration to the *system of care* in which the learner will incorporate new or validate existing learned behaviors. Planners must be sure to address anticipated barriers that could block implementation (e.g., formulary restrictions, time not allotted for implementation of new skills, behaviors, insurance doesn’t reimburse for treatments, organization doesn’t support educational efforts, lack of resources, policy issues within organization, etc.).

This activity has no relevant system barriers.

The following barriers have been identified and will be addressed in the educational intervention (add lines as needed)

IDENTIFIED SYSTEM BARRIER	PLANNED DISCUSSION IN ACTIVITY CONTENT

### 10. Patient Safety Consideration

Planners should examine planned activities for patient safety concerns in accordance with the national public interest. Please list issues of patient safety associated with these educational interventions that need to be addressed in this activity:

There are no patient safety issues applicable to this activity.

IDENTIFIED PATIENT SAFETY ISSUES	PLANNED DISCUSSION IN ACTIVITY CONTENT

### 11. Tools That Support Learners in Achieving Results

Thoughtful tools that support the achievement of your intended results for this activity should be developed and are encouraged. These tools are called “non-educational interventions.” List any non-educational interventions/strategies (and where they can be obtained or who will develop them) that will be used in this activity to enhance the potential for physician change or reinforce the desired educational results (examples of non-educational interventions include follow up mechanisms, patient handouts, algorithms, etc.).

TOOL	PURPOSE OF TOOL	SOURCE OR ASSIGNED DEVELOPER