

Understanding the Essentials of Continuing Medical Education Planning

Before applying for *AMA PRA Category 1 Credit™* for a CME activity, quality planning must take place. A system of gathering facts (or a needs assessment) must be established and carried out in order to identify a **proven** educational gap that exists among the targeted audience.

What is a Needs Assessment?

The needs assessment includes the process of *identifying and analyzing data* that reflects the rationale for a particular educational activity. The need must be evidence-based and reflect a proven patient care issue or medical trend.

What are some examples of acceptable educational needs?

Here are a few of examples of what kinds of need are acceptable

- **Presumed need**: new methods of diagnosis or treatment, development of new technology and changes that affect patient care.
- **Expressed need**: information gathered from past activity's evaluations, surveys from target audience
- **Demonstrated need**: quality assurance data, chart review, professional society requirements and literature citations.

Not only does the need have to be identified, but evidence of this need must be provided and cited in your Educational Needs paragraph.

How do I prove an educational need? What evidence is acceptable?

Statistical evidence and/or documentation of the identified need is an essential part of the Needs Assessment section of a CME application. Here are some examples of documentation that would be deemed appropriate and necessary.

- **Journal articles or other peer reviewed sources**
 - Attach bibliography citing journals or other sources, include journal abstracts or relevant paragraphs that support your educational needs assessment
- **Clinical evidence/research**
 - Attach abstract of evidence.
- **Discussion with/ faculty (clinical/research)**
 - Attach minutes or notes of discussions and include any references to data, journals, and other sources. Audio recordings of minutes should be digital and readily convertible to MP3.
- **Survey results or breakdown of results from a formal needs assessment**
 - Attach sample survey, summary of findings and include a description of representative audience sampled
 - Summary of evaluations from previous activities
- **Other**
 - Cite all studies, references, or data used to identify and support the educational need

- Examples of Other:
 - continuous quality improvement issues
 - site visit reports
 - focus groups
 - health policy studies
 - incident reports
 - patient records and databases
 - professional review organization studies
 - government reports on health stats/technology developments, etc.

Writing an Educational Needs Paragraph

There are three parts to an Educational Needs paragraph.

- 1.) Clearly identify patient care issues to be addressed by this CME activity that can be factually represented and goes beyond the perception of the sponsor. Cite specific statistics and facts that prove the need and identify in the paragraph the source from which this evidence was provided.
- 2.) Describe how patient care issues will be addressed within the educational activity, i.e. educational methods.
- 3.) Describe the desired performance improvements that are anticipated as a result of the learner receiving and implementing this education into his/her practice of medicine.

If all three requirements are satisfied, the applicant will have a complete educational needs paragraph. In summary, the paragraph must give the reader a clear idea of what you plan to do, how you are going to do it, who will be doing the teaching, who will the activity benefit and how will the activity affect that identified beneficiaries.

What is an unacceptable need?

Applicants are encouraged to cite outside sources because the need must “*go beyond the sponsor’s own perception of need and must relate to relevant patient care issues.*”

This is an example of an unacceptable educational need:

“The Ohio State University Medical Center does not currently have a program addressing this issue, therefore, this course is needed.”

An activity cannot be established and/or certified unless it addresses a larger patient care issue. An educational deficit regarding that patient care issue must exist and be proven for a series to be established.

The applicant can, however, cite patient care records, quality assurance statistics or other similar information from the applying institution. Those items prove that a wider patient care issue exists, and it can be assumed that the issue or issues are not limited to that institution.

Writing Learning Objectives

While the educational need indicates what deficits or insufficiencies will be address in the activity, the objectives state the educational goals of the activity; that is, what the planning committee anticipates the audience will derive from the activity. Stated learning objectives communicate to the audience:

- **what is to be taught and learned**
- **what the learner will be able to “do” after the activity**
- **the basis for evaluating both the student’s learning and the effectiveness of the instructional program.**
- **the type and extent of activities that are required for successfully carrying out the learning.**

The statement of learning objectives also can help the planning committee to think in specific terms and to organize the sequence of the subject matter of the educational activity – establishing the agenda, step 3 in the planning process of an educational activity.

It is important that concrete and measurable terms verbs are used when constructing learning objectives.

The following terms to be CONSIDERED when writing learning objectives:		
To explain	To apply	To predict
To identify	To employ	To evaluate
To describe	To illustrate	To defend
To integrate	To use	To assess
To contrast	To interpret	To distinguish
To sort	To categorize	To diagram
To solve	To formulate	To report
To relate	To organize	To restate
To recall	To prepare	To review
To list	To arrange	To classify
To name	To construct	To translate
To recognize	To create	To discriminate

General terms such as those listed below are inadequate because they are open to many interpretations (they are non-specific) and **are not accessible to quantification.**

AVOID the following terms when writing learning objectives:		
To know	To understand	To really understand
To fully appreciate	To internalize	To grasp the significance of
To have an awareness of	To gain knowledge of	