



**Does Your  
Organization Walk  
the Talk?**

**Using What You  
Already Know to  
Advance Your  
Organization  
through Staff CPD**

**Competency 8.3: Promote professional development for self and staff**

**Friday, January 28, 2011**

# Presenters and Disclosures

- Sheila Robertson, MPH, CCMEP  
CME Enterprise
  - Does not have an interest in selling a technology, program, product, and/or service to CME professionals
- Bruce Bellande, PhD, FACME, CCMEP  
DWA Healthcare Communications Group
  - Does not have an interest in selling a technology, program, product, and/or service to CME professionals
- \*Robyn Snyder, BA  
CME Enterprise
  - Does not have an interest in selling a technology, program, product, and/or service to CME professionals

\*Denotes change from printed abstract.

# Question for Audience

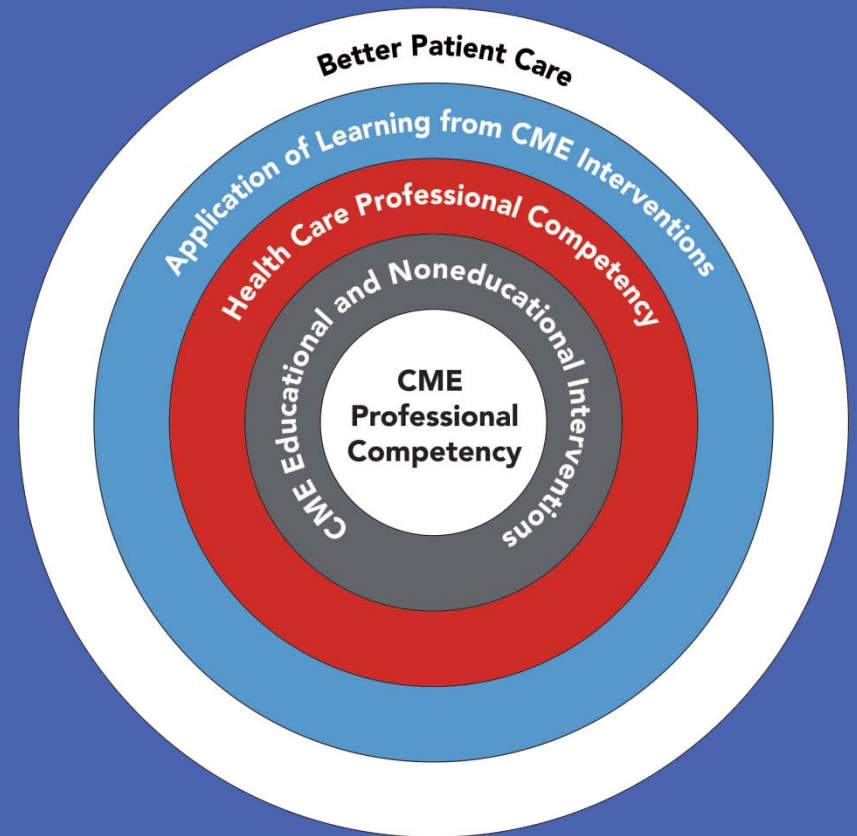
- Which best describes your organization?
  - Commercial Supporter
  - Hospital or Health System
  - Medical Education Company
  - Medical School
  - Medical Specialty Society
  - State Medical Society
  - Other

# Questions for Audience

- What brought you here today?
  - I want to start a staff CPD program
  - I'm facing barriers to doing staff CPD
  - Other
- What would you most like to know?

# Link to Conference Theme

- “The New CME—  
Blending Adult Learning Facilitation  
and Individual/Organizational  
Performance”
- Our own competence impacts  
our ability to blend adult learning  
into CME interventions we  
develop, which impact  
individual/organizational  
performance and, ultimately,  
patient care



“Educate from the inside out”

# Session Objectives

At the completion of this session, you should be able to

1. Develop a **value proposition** for investing in staff CPD to elicit **stakeholder support** in your organization.
2. Describe key **steps and associated timeframes** for developing and maintaining a staff CPD program.
3. Prioritize initial and ongoing multi-disciplinary **needs** for staff CPD in your organization.
4. Propose relevant **interventions** and an appropriate **tracking** mechanism for your organization.
5. Create an **action plan** to advance your organization by utilizing staff CPD

# 1. Value Proposition

Objective: Develop a **value proposition** for investing in staff CPD to elicit **stakeholder support** in your organization

# Value Proposition

- Having a CPD program brings value to supporters, stakeholders, and partners by
  - Maintaining and enhancing the knowledge and skills (competence) of staff
  - Empowering and equipping staff so they are fully capable of executing their roles and responsibilities
  - Achieving greater success in attaining your mission, regulatory compliance, and institutional policies and procedures
  - Supporting staff seeking certification

## 2. Key Steps and Timeframes

Objective: Describe key **steps and associated timeframes** for developing and maintaining a staff CPD program

# Initial Planning Considerations

- What is the current vs desired state in your organization?
  - We already had CPD activities in various formats and levels of formality
  - Desired to add depth, structure
  - Initial focus was team-based
- Resource considerations
  - Low cost
  - No sophisticated technology

# Key Steps and Timeframe: Year 1

- February 2009 Staff Needs Assessment
- March Gap Analysis
- April Curriculum Framework, Tracking Tools
- May-November Interventions
- November Summative Evaluation
- December Analysis of Remaining Gaps

# Year 2 Planning Considerations

- Desired more individualized CPD
  - Self-directed learning
  - Needs assessment
  - Individual learning plans (ILPs)
- Integration with Corporate (parent company)  
CPD focus

# Key Steps and Timeframe: Year 2

## *Integration With Corporate CPD*

- Q4 2009 Corporate Self Assessment
- January-February Gap Analysis; Identify Priorities
- March Build E-library; Create CME ILPs
- May-June Launch eLearning Portals
- June Create Corporate ILPs
- August-December Corporate Classroom Courses
- October-November Survey Staff; Coach Managers
- December SWOT; Improvement Plan

# 3. Prioritize Staff Needs

Objective: Prioritize initial and ongoing multi-disciplinary **needs** for staff CPD in your organization.

# Needs Assessment Foundation: CME Specific

- Alliance for CME “Competency Areas for CME Professionals” (June 2003)\*
  - Close replica of the Alliance’s CME Professional Competencies Self-Assessment

<b>Alliance Competency Area</b>	<b>Competency Area Description</b>
<b>1</b>	<b>Adult/Organizational Learning Principles</b>
<b>2</b>	<b>Educational Interventions</b>
<b>3</b>	<b>Performance Measurement</b>
<b>4</b>	<b>Systems Thinking</b>
<b>5</b>	<b>Partnering</b>
<b>6</b>	<b>Leadership</b>
<b>7</b>	<b>Administration/Management</b>
<b>8</b>	<b>Self-Assessment and Lifelong Learning</b>

\*Alliance for Continuing Medical Education. CME Professional Competencies Self Assessment. Available at: [http://www.acme-assn.org/home/ComptAreas/self\\_assessmnt.shtml](http://www.acme-assn.org/home/ComptAreas/self_assessmnt.shtml). Accessed January 25, 2011.

# Needs Assessment Foundation: CME Specific (cont.)

- National Commission for Certification of CME Professionals (NC-CME) content outline (March 2008)\*

NC-CME Domain	Domain Description
1	Adult Learning Principles
2	Educational Interventions
3	Relationships With Stakeholders
4	Leadership/Administration and Management
5	Knowledge of CME Environment

# Needs Assessment Foundation: Corporate Values

- Developed competencies relating to high-level values of “H4S”
  - Healthy
  - Honorable
  - Humble
  - Hungry
  - Smart

# Needs Assessment: Interdisciplinary Aspect

- Staff self-rated relevance of each competency based on their roles/responsibilities (1-5 scale)
- Gaps were defined on individual basis as those with relevance  $\geq 3$
- Unique intervention mix recommended per individual gaps

# Needs Assessment Tool Example

## ACME Competencies

For each of the competencies below, please place an X in the box for the corresponding rating column that describes the extent to which you perceive the competency to be a responsibility of your job (relevance) and the extent to which you believe you've attained this competency (proficiency).

### Rating Scale Key

1	2	3	4	5
None	Slight	Moderate	Considerable	Great

### Competency Area 7: Administration and Management

Manage office operations to meet personnel, finance, legal, logistical, and accreditation standards.

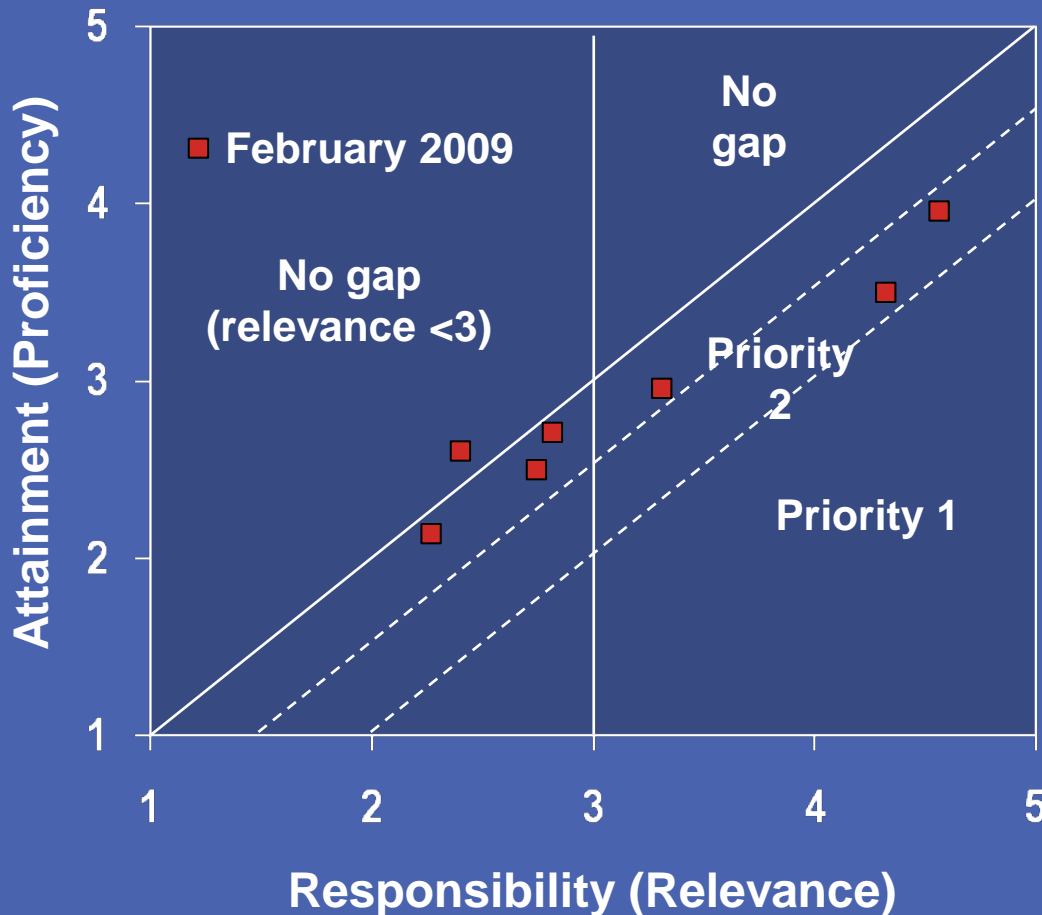
To what extent is this competency a current **responsibility** of your job? (*relevance*)

To what extent have you **attained** this competency? (*proficiency*)

		To what extent is this competency a current <b>responsibility</b> of your job? ( <i>relevance</i> )					To what extent have you <b>attained</b> this competency? ( <i>proficiency</i> )				
		1	2	3	4	5	1	2	3	4	5
7.1	Document the value of the CME program to its own organization and learners										
7.2	Manage finances of the CME program to meet the organizational needs										
7.3	Provide appropriate logistics for educational activities										
7.4	Facilitate the work of educational committees										
7.5	Develop a collaborative, service-oriented management culture that promotes continuous improvement										
7.6	Assure compliance with ACCME and other regulatory										
7.7	Apply effective management skills (eg, problem solving, interpersonal skills, delegation and supervision)										

Area 7: Do you have any questions or suggestions regarding specific knowledge, skills, or resources that would best help you attain these competencies?

# Needs Assessment Results: Example Aggregate Gaps



- Competency area 7
- Priority 1 gap:  
Relevance – proficiency  $\geq 1$
- Priority 2 gap:  
Relevance – proficiency =  
0.50-0.99
- Gaps not considered  
if relevance  $< 3$

# Examples of Desired Outcomes

- Participation
  - # of contact hours per employee
- Satisfaction
- Knowledge
  - Pass posttests
- Competence
  - Close self-identified gaps
  - Attain certifications
- Performance
  - Implement changes (assess via follow-up)

## 4. Interventions and Tracking

Objective: Propose relevant **interventions** and an appropriate **tracking** mechanism for your organization.

# Many Intervention Options

## ■ Internally developed

- CCMEP study sessions
- PMI study groups
- Journal club
  - *JCEHP, Harvard Business Review, PM Network*
- Policies and procedures
- Medical lunch-n-learns
- E-library with resources (handouts, recordings) catalogued by competency

## ■ Externally developed

- Alliance for CME Webinars
- Independent Webinars (partners, supporters, etc)
- Conferences/Meetings (Alliance, AMA Task Force)
- Courses through corporate eLearning portal
- *Harvard ManageMentor* courses
- ACCME Web site
- Alliance CALLS

# Link Gaps to Interventions: CME Competencies Example

Alliance C #	Competency Description	Possible Interventions/Resources
3.6	Promote <b>continuous improvement</b> of the CME office	<ul style="list-style-type: none"> <li>• Journal club - <i>MM&amp;M</i> and <i>Almanac</i> articles</li> <li>• Alliance for CME Webinars</li> <li>• Alliance for CME Annual Meeting review sessions</li> </ul>
5.4	Apply effective <b>communication and interpersonal</b> skills	<ul style="list-style-type: none"> <li>• Journal club - <i>HBR</i> and <i>PM Network</i> articles</li> </ul>
7.7	Apply effective <b>management skills</b> (eg, problem solving, interpersonal skills, delegation and supervision)	<ul style="list-style-type: none"> <li>• Journal club - <i>HBR</i> and <i>PM Network</i> articles</li> <li>• Workshops - eg, Handling Objections</li> </ul>

# Link Gaps to Interventions: Corporate ILP Example

Employee: Jane Doe Department: ABCD Manager: John Doe

Position Title: Education Director Time Period Covered July 1, 2010 to December 31, 2011

REQUIRED CPD						2011 Hours Planned
Development Goal	Competency	Purpose (Objective)	Method or Activity (strategy/training/experience)	Results Expected (What will you do differently)	Time Frame	
Corporate Requirement			Customer Service Orientation: e-Learning Portal video and classroom follow-up		Q2	2
Corporate Requirement			Teambuilding: e-Learning Portal video and classroom follow-up		Q4	2
CME Requirement			Monthly Compliance live meetings		~.5 hr/mo	6
ELECTIVE CPD						
Improve self-identified gaps	Clearly stating expectations	Improve skill and confidence	HMM07: Delegating HMM39: Goal Setting HMM32: Performance Measurement	Link job descriptions to measurable expectations; review with staff	Q2	

# Tracking and Administration Options

- Team-based
  - CPD champion tracks interventions on spreadsheet
  - Sign-in sheet (claim hours commensurate with participation)
  - Catalog handouts, resources, etc, in e-library
- Individual-based
  - Individual tracks interventions on spreadsheet
  - Browse and enroll in courses through online portals

# Team-Based Tracking Example

Format	Host	Intervention / Resource	Title/Description/Topics	Scheduler	Presenter(s) <i>(internal receive double credit)</i>	Handouts	Occurrence	Date	Time (location if live/external training)	ACME Competency Area(s) (1-8)	CCMEP Domain(s) (1-5)	# Contact Hours	Status
<b>INTERNAL</b>													
Live - Meeting	CMEE	Journal Club	Evaluating Your Evaluations: A Practical Guide (CE Measure); Outcomes Analysis of Case-based Education in a Multidisciplinary, Multiple Format Setting (CE Measure); Picking the Right Transition Strategy (HBR)	Staff A	Staff C, Staff D, Staff E	Agenda, articles, and reviews filed electronically	Monthly	01/26/09	11:00am-1:00pm	2, 3, 7	1, 2, 4	2.00	Completed
Live - Meeting (in conjunction with monthly CMEE staff meeting)	CMEE	CMEE Policies and Procedures Training	Policies on content review and validation, educational planning, evaluation and improvement	Staff A	Staff F	Policy handouts distributed in session; filed electronically	Monthly	04/30/09	8:30-10:00am	7	5	0.50	Completed
<b>EXTERNAL - WEB</b>													
Online - Webinar	ACME	Legal Issues Impacting CME (2 Session Package)	Session I: Federal (FDA, HHS, OIG) and State Regulation of Certified CME	Staff A	John Kamp	Handouts downloaded from ACME Web site, in file (session ID = 2280)	Series of 2	05/14/09	2:00-3:00pm	7	5	1.00	Completed
<b>EXTERNAL - MEETINGS</b>													
Live - Meeting	ACME	ACME Annual Meeting 2009	Conference theme: Elevating the Profession and Practice of Continuing Medical Education: Professional Challenges in the 21st Century; Various sessions and	Staff B	Various	Program book and session slide handouts collected by managers; relevant information distributed at ACME Annual Meeting shared learning sessions	One-time	01/28/09 - 01/31/09	San Francisco, CA	1,2,3,4,5,6,7,8	1,2,3,4,5	Varies	Completed

# Team-Based Tracking Example (cont.)

		Staff A	Staff B	Staff C	Staff D	Staff E	Staff F	Staff G	Staff H	Staff I	Staff J
		Dept 1	Dept 1	Dept 1	Dept 2	Dept 2	Dept 3	Dept 3	Dept 4	Dept 4	Dept 4
<b>Format</b>	<b>Title/Description/Topics</b>	<b>3.00</b>	<b>3.50</b>	<b>4.50</b>	<b>19.50</b>	<b>5.50</b>	<b>2.00</b>	<b>3.50</b>	<b>30.00</b>	<b>1.50</b>	<b>2.50</b>
<b>INTERNAL</b>											
Live - Meeting	Evaluating Your Evaluations: A Practical Guide (CE Measure); Outcomes Analysis of Case-based Education in a Multidisciplinary, Multiple Format Setting (CE Measure); Picking the Right Transition Strategy (HBR)	2.00	2.00	4.00	4.00	4.00		2.00	2.00		2.00
Live - Meeting (in conjunction with monthly CME staff meeting)	Policies on content review and validation, educational planning, evaluation and improvement		0.50	0.50	0.50	0.50	1.00	0.50	0.50	0.50	0.50
<b>EXTERNAL - WEB</b>											
Online - Webinar	Session I: Federal (FDA, HHS, OIG) and State Regulation of Certified CME	1.00	1.00		1.00	1.00	1.00	1.00	1.00	1.00	
<b>EXTERNAL - MEETINGS</b>											
Live - Meeting	Elevating the Profession and Practice of Continuing Medical Education:				14.00				26.50		

# Individual-Based Tracking Example Within ILP

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Position Title: Education Director Time Period Covered July 1, 2010 to December 31, 2011

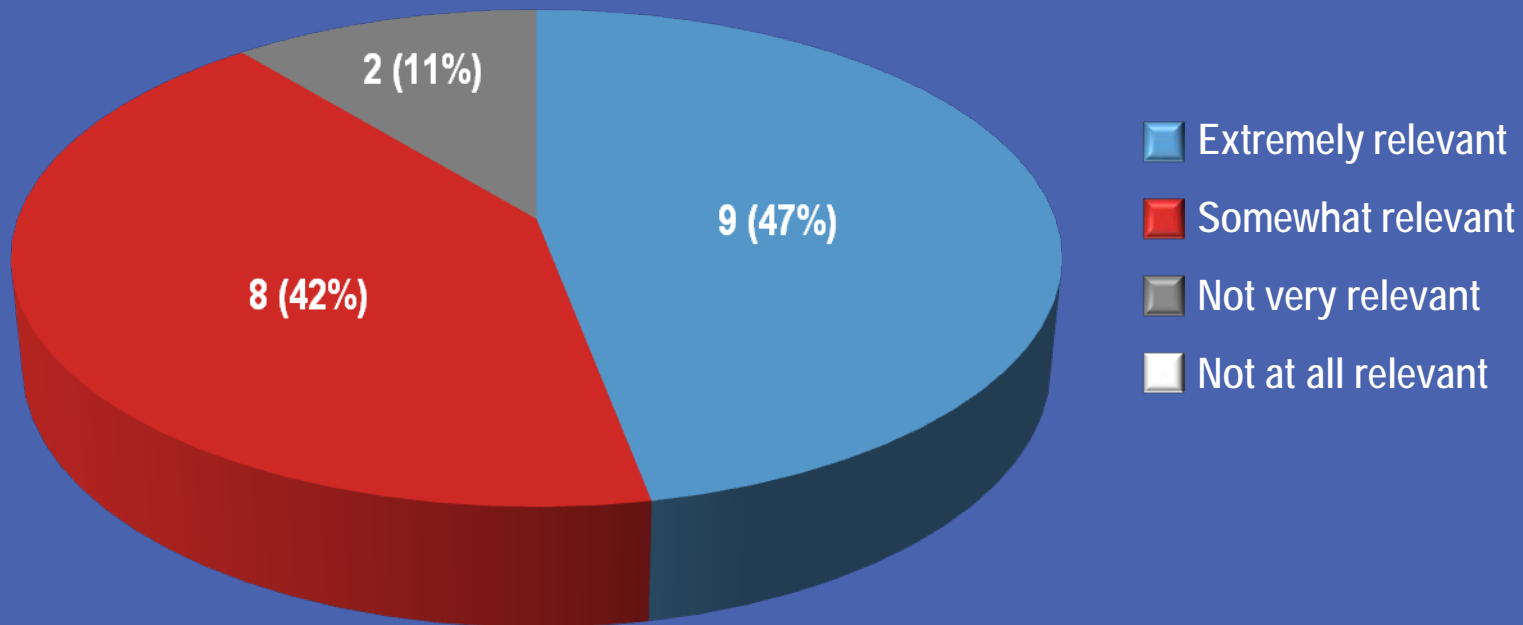
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ELECTIVE CPD						
Improve self-identified gaps	Clearly stating expectations	Improve skill and confidence	HMM07: Delegating HMM39: Goal Setting HMM32: Performance Measurement	Link job descriptions to measurable expectations; review with staff	Q2	

# Outcomes Beyond Participation

- Satisfaction
- Knowledge
  - Pass posttests
- Competence
  - Close self-identified gaps
  - Attain certifications
- Performance
  - Implement changes (assess via follow-up)

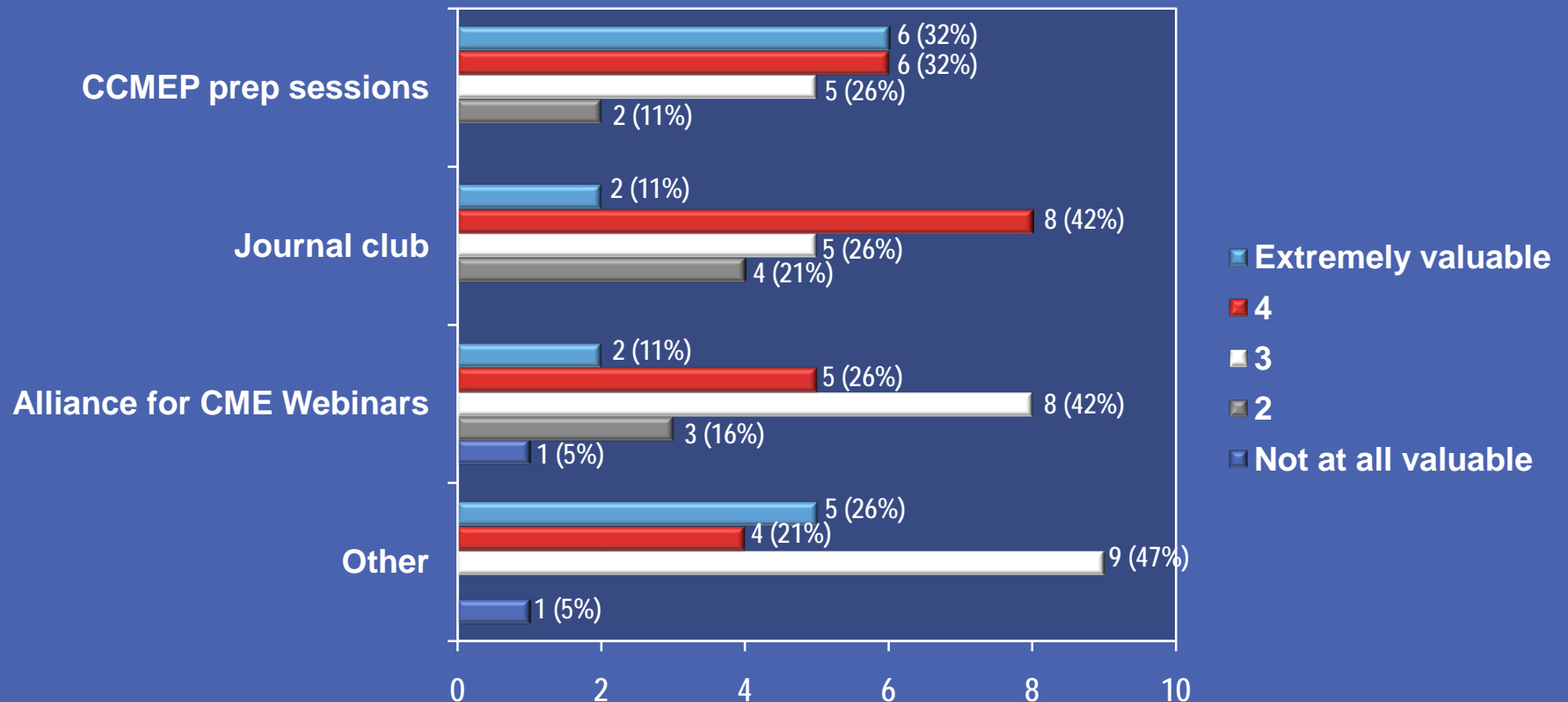
# Year 1 Outcomes: Interventions Were Relevant

- As they relate to my particular role at CME Enterprise, the CPD Program and the interventions in which I had the opportunity to participate in 2009 were:

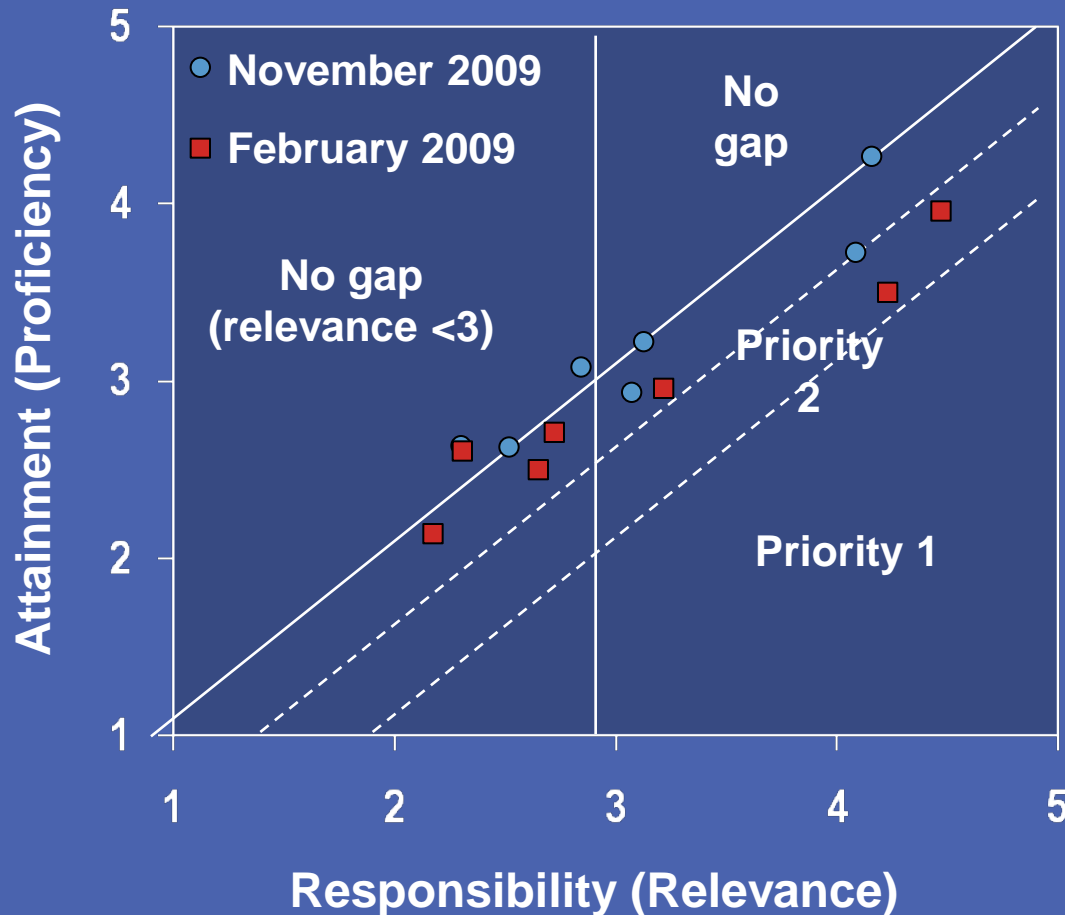


# Year 1 Outcomes: Interventions Were Valuable

- Please rate the following types of CPD interventions based on how valuable you think they were in providing meaningful takeaways and helping you do your job better



# Year 1 Outcomes: Example of Closing the Gap



- Compared change in gaps from start (red squares) to end (blue dots) of 2009 program
- Many factors contribute to change
  - Formal CPD
  - Informal learning experiences
  - Other activities

# Year 2 Outcomes: Satisfaction and Intended Changes

- Satisfaction
  - 86% were satisfied with the Corporate CPD Program thus far
- Some intended changes from Emotional Intelligence course
  - “Listen intently, earnestly ,and holistically”
  - “Strengthen connection between self-awareness & self regulation”
  - “Work on framing uncomfortable or confrontational situations to obtain desired results”
  - “Take an ‘emotional inventory’ frequently”
  - “Put myself in other’s shoes”
- At 60-day follow up, learners had either made changes or were in the process of implementing change

# 5. Create Your Action Plan

Objective: Create an **action plan**  
to advance your organization  
by utilizing staff CPD

# Tips To Get Started

- Get leadership buy-in
- Be willing to secure resources (human, financial) to administer and to provide interventions
  - Company time vs personal time
- Scale it to work for your organization
  - It's OK to start small (eg, do one competency at a time)
- Consider externally-developed interventions
- Keep it relevant for each individual

# Motivating Staff

- Determine yearly training time allocations (hours) per employee and include CPD targets in annual performance appraisal
- Create Individual Learning Plans (ILPs) based on performance improvement goals, self-assessment gaps, and desired competence outcomes
- Reward and recognize staff for attaining goals and desired outcomes
- Continue to apply CME planning principles in the design and format of the CPD program and interventions

# What is Your Action Plan?

- What 2 things can you do next to advance staff CPD in your organization
- What barriers do you anticipate?
- Discussion

# Review: Session Objectives

At the completion of this session, you should be able to

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# Thank you for coming and good luck with your CPD programs!

- Sheila Robertson, MPH, CCMEP
  - Sheila\_robertson@cmeenterprise.com
  - \*785.883.4417
- Bruce Bellande, PhD, FACME, CCMEP
  - Bruce\_bellande@dwahcg.com
  - 317.846.2690
- \*Robyn Snyder, BA
  - Robyn\_snyder@cmeenterprise.com
  - 317.846.2761

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