Purpose

The Policy on Educational Planning exists to provide guidance for staff, faculty and department chairs on policies and procedures used in the application process to meet ACCME Criteria 2-6.

Policy

Identifying Educational Needs. The application planning process links identified educational needs regarding competence or performance with a desired result. The need for each CME activity must be substantiated through identification and assessment of professional practice gaps of the target audience through the CME application. These gaps may come from any number of sources and documentation is required to be submitted with the application document. These documents are also used to identify the learners' current or potential scope of practice. Examples include:

- National/Regional Physician Performance Data (e.g., NCQA)
- Survey of Targeted Learners [attach copy of survey, list of who was surveyed and the summary of the survey]
- Peer Reviewed Literature [attach recent articles from peer-reviewed publications or other literature reviewed that link to the topics being presented in the activity]
- Published Expert Opinion or Course Director Observations [attach articles or course director planning minutes that include expert statements or list of experts and their recommendations]
- Association, Specialty Society or State Guidelines (e.g., MOC) [attach summary]
- Hospital/Department QI Findings [attach QI Score Cards]
- Epidemiological Findings [attach articles]
- Healthcare Research and Quality Data (e.g., AHRQ, CMS) [attach pertinent literature]
- Previous Evaluation/Outcomes Measurement Summaries [attach evaluation summary from previous iteration of the activity]
- Legal/Regulatory Requirements (e.g., JCAHO, OSHA)
- National/Regional Physician Competencies (e.g., GMP-USA)

Creating Learning Objectives from Educational Needs. Objectives should be derived from the needs assessment, as described in the application. Learning objectives should relate to the intended audience's scope of practice and explain what specific actions/knowledge the learner will be able to apply to their practice setting after participating in this educational activity, and be an expression of the expected change, in terms of physician competence or performance. The learning objectives should complete this statement: "At the conclusion of this educational activity, the participant should be able to:

- **Statement of Learning Objectives to Learners.** Every CME activity must state the learning objectives in writing, in the printed brochure or other promotional material and in the syllabus or handout materials in order to provide a benchmark for the evaluation of the activity and assist participants in deciding whether to attend the activity.
- **Statement of Learning Objectives to Planners/Faculty**. Additionally, all faculty members and planners must receive the finalized learning objectives during the planning stages in order to assist them in preparing presentations that fit with the overall objectives
- **Expressing Desired Results**. As described in the application, meeting the learning objectives must be expressed in terms of a change in physician competence, performance or patient outcomes and be linked to the educational needs and learning objectives listed. The professional practice gap is to be used to link the desired results with the identified needs and learning objectives.

- **Selecting Educational Format**. The choice of educational format must be based on the needs, the type of professionals attending the program and their learning preferences, and other logistical and financial considerations as described in the application. The professional practice gap is to be used to link the learning method with the identified needs, objectives, and desired results. When planning an educational activity provided, presentations should be amplified by good use of audio-visual materials, appropriate handout materials, and interactive sessions whenever possible.

- **Incorporating Desirable Physician Attributes**. All activities are developed in the context of ACGME core competencies (Patient care/safety; Medical knowledge; Practice-based learning and improvement; Interpersonal and communication skills; Professionalism; and System-based practice) as demonstrated through the activity application which asks activity directors to highlight which ACGME core competencies will be addressed in their activity