

# Education Planning Form (Part 2)

Your process as a Planner:

**Plan the activity → Apply for CME credit approval → Implement the activity → Complete an *Outcomes Summary***

Planning is just the beginning of the process. You are making a commitment to measure changes in competence, performance, and/or outcomes that result from your activity, and to report them in your annual Outcomes Summary.

## START HERE

**Watch this video:** How to plan your CME activity for learning impact ([video 3:41](#))

*Here are additional resources to assist you in completing the application:*

Would you benefit from a warm-up to the process? Take 4 minutes, right now, and watch our overview [video](#).

How to identify professional practice gaps ([video 2:38](#))

How to identify educational needs for knowledge, competence, and performance ([video 2:29](#))

Understanding the relationship between knowledge, competence, performance, and outcomes ([PDF](#))

How to write good learning objectives: the [STAR Model \(PDF\)](#) ([video 9:32](#))

How to choose learning formats that help you meet your learning objectives ([PDF](#))

How to assess how well you met your learning objectives ([PDF](#))

How to evaluate your program ([PDF](#))

**This is a worksheet. Submit your application using the Smartsheet link that is emailed to you after submitting Application Part 1.**

## Education Planning Form - Part 2

We are here to help. For support or questions, please call 505-272-3942 or email [hsc-cpl@salud.unm.edu](mailto:hsc-cpl@salud.unm.edu).

**1. What is the title of your educational activity?\***

**2. CME Provider Activity ID:\* (RSS-xxx, LC-xxx, EM-xxx, BOL-xxx or ISL-xxx)**

**3. Is your CME Activity:\***

For educational activities that use multiple formats, indicate all that apply.

Regularly Scheduled Series (RSS) - Grand Rounds, Tumor Board, M&M, and Journal Club

Live Course (in-person or virtual)

Webinar

On-demand/self-paced web learning

Other, if selecting "other", please describe your activity

**4. Who is involved in planning your educational activities?\* Please add first/last names in the text boxes below.**

Fellows/residents/medical students (recommended)

Patients

Interprofessional team members (e.g. nurses, advanced practice provider, etc.)

Attending physicians

Other, if selecting "other" please list the other members of your planning committee:\*

**Check all that apply to your activity:\***

Residents, fellows, and or students be involved as planners AND presenters in the activity

The activity teaches about collection, analysis, or synthesis of health/practice data AND uses these data to teach about healthcare improvement

The activity teaches strategies to improve population health

**5. Gap(s): State the difference between the current and desired state of learner competence, performance, and/or patient/trainee/student outcomes.**

- Examples:

- Surveys of attending's and trainees indicate insufficient knowledge and skill in collecting and analyzing health/practice data to teach residents about healthcare improvement. (recommended)

- Emerging changes in guidelines for treatment require updating to maintain high standards of care. (recommended)

- NM DOH data show that fewer than 15% of patients with an alcohol use disorder get treatment and we want to raise that to at least 50% in our division.

## What sources did you use to determine these gaps?

NM Department of Health Reports

QI dashboards/patient care audits (recommended)

Mortality/morbidity statistics

Learning environment reports

Surveys or request from target audience

Department/division priorities

Other, if you checked "other" please provide the information below:\*

## 6. Needs: What do participants need to know or do to close the gap?

Examples:

- Clinicians need to know anatomy and physiology of the joints and best practices for evaluating joint symptoms.
- Clinicians need to learn standard oncologic clinical care protocols for optimal management of patients diagnosed with solid tumors.
- Clinicians need to demonstrate skills in creating respectful and professional learning climates.
- Clinicians need experience and feedback on applying research and scholarship skills to their own projects and to patient care.

Using the guidance above, indicate below one or more examples of what participants need.

### Need: gaining knowledge

Please provide examples below.\*

### Need: knowing what to do with knowledge (competence) Knowing what to do if given the opportunity to do it.

Please provide examples below.\*

### Need: applying new knowledge to practice (performance)

Please provide examples below.\*

## 7. Learning Objectives for participants:

Recommended to indicate no more than 2-3. For guidance on writing learning objectives, click here:

<https://app.box.com/s/ovhujesupmmo62cqkaw9o8ulbygxh046>

Examples:

- Participants will use clinical cases to guide quality improvement
- Participants will correctly apply splints to simple extremity fractures
- Participants will be able to design small-group-learning opportunities
- Participants will adopt tools to promote professional wellbeing

Learning objective 1, Participants will:

Learning objective 2, Participants will:

Learning objective 3, Participants will:

**8. What formats or techniques will be used to promote learning during the activity?**

For more guidance on engaging your audience to promote learning, click here.

<https://hsc.unm.edu/medicine/education/cpl/cpl-docs/learning-formats.pdf>

Small group discussion (recommended)\*

Yes No

Case-based discussion (recommended)\*

Yes No

Resident/student/fellow/attending/QI project presentations (recommended)\*

Yes No

Audience response/polling (recommended)\*

Yes No

Panel discussion\*

Yes No

Demonstration\*

Yes No

Role play\*

Yes No

Simulation\*

Yes No

Skills-based training: Practice with feedback with clinical procedures or practice\*

Yes No

Hybrid virtual and in-person learning\*

Yes No

Virtual learning\*

Yes No

Patient presentation\*

Yes No

Lecture\*

Yes No

Other\*

Yes No

If you selected "other" formats or techniques, please describe:

**9. What will you do to promote learning after the activity (consider contacting CPL for ideas)?**

Send reminders about what was taught (e.g. sharing slides, other learning tools) (recommended)

Review clinician 'report cards'

Review patient survey results

Seek peer feedback

Provide on-demand web resources

Others

If you selected "other", please provide additional information below:

**10. Outcomes: What is your CME activity designed to change?**

**One or more responses is required. At least one of these changes, *other than changes in knowledge*, must be evaluated.**

**Changes in participants' knowledge\***

Example: Participants will know the three components of the Stanford model for professional fulfillment to mitigate healthcare provider burnout

Yes

No

Will the changes in knowledge be evaluated?\*

Yes

No

How will this change be evaluated (elaborate in #11)?\*

Objective, such as observation, test

Yes

No

Subjective, such as self-reported change, survey\*

Yes

No

**Change in participants' competence; what they would do if they could\***

Example: Increase ability of participants to identify systems-based errors for quality improvement projects.

Yes

No

Will the changes in competence, strategies and/or skills be evaluated?\*

Yes

No

How will this change be evaluated (elaborate in #11)?\*

Objective, such as observation, test, health system

Yes

No

Subjective, such as self-reported change, survey\*

Yes

No

**Changes in participants' performance; what they do in practice\***

Example: In order to meet the need for improving treatment of chronic non-cancer pain, providers will change how they prescribe opioids according to presented protocols.

Yes

No

Will the changes in behaviors (performance) be evaluated?\*

Yes

No

How will this change be evaluated (elaborate in #11)?\*

Objective, such as observation, test, health system data

Yes

No

Subjective, such as self-reported change, survey\*

Yes

No

**Change in patient health\***

Example: As a result of clinicians attending this activity, patients will have measurably lower mortality from pulmonary embolus.

Yes

No

Will the changes in patient health be evaluated?\*

Yes

No

How will this change be evaluated (elaborate in #11)?\*

Objective, such as health system data

Yes

No

Subjective, such as self-reported change, survey\*

Yes

No

**Change in community/population health\***

Yes

No

Will the changes in community/population health be evaluated?\*

Yes

No

How will this change be evaluated (elaborate in #11)?\*

Objective, such as health system or department of health data

Yes

No

Subjective, such as self-reported change, survey\*

Yes

No

**Change in learning outcomes for residents/students\***

Example: USMLE Step pass rates will increase as a result of faculty adopting teaching techniques learned in this educational series.

Yes

No

Will the changes in learning outcomes for residents/students be evaluated?\*

Yes

No

How will this change be evaluated (elaborate in #11)?\*

Objective, such as grades, board-exam performance data

Yes

No

Subjective, such as self-reported change, survey\*

Yes

No

Using the guidance above, indicate below the specific changes related to the objectives of your activity you intend to evaluate that match with your choices above.\*

**11. Evaluation: How will you assess the outcomes in #10?**

Choose all that apply\*

Objective test

Audience response systems (e.g., Zoom polls, iClicker, PollEverywhere, etc.)

Retrospective pre/post survey

Commitment-to-change responses

Direct follow-up with learners (e.g., learner report of change in practice/performance via survey or personal communication)

Observation of performance following the learning opportunity

Other, if you selected "other", please provide us with your assessment method:

For acceptable CME evaluation examples, click here.

[https://hsc.unm.edu/medicine/education/cpl/\\_cpl-docs/learning-assessment-methods.pdf](https://hsc.unm.edu/medicine/education/cpl/_cpl-docs/learning-assessment-methods.pdf)

**Thank you for your commitment to education!**

Send me a copy of my responses

Submit