

**Activity ID \***

Thank you for committing to changing medical practice and medical education through the planning, design and execution of CME activities. Meaningful change in practice results from purposeful design and implementation, and this Education Planning Form sets you up to achieve the best possible outcomes.

CPL is here as your partner in achieving your educational plan, and we are always available to help you achieve your practice improvement goals. In addition to resources at the CPL website, please feel free to contact us at [hsc-cpl@salud.unm.edu](mailto:hsc-cpl@salud.unm.edu) with your specific questions or for a consultation on completing the form and planning your CME activity.

Effective CME activities are purposefully designed to change competence and performance of individuals and the organizations where they work, leading to improved patient outcomes - and so doing meet the expectations of the AMA and ACCME. Deliberate planning and design set your activity up for success.

**1. What is the planning process for your CME activity?**

[Click Here for Tips and Examples](#)

**Planning Process \***

How did your planning committee determine the topics and speakers for this activity? Did you discuss gaps, needs, and assessment? If there are minutes or notes from a scheduled meeting, please upload and indicate "Minutes attached". The upload field is at the bottom of this form. (Maximum 100 words)

**Participants**

Please provide the names of those who participated in the planning process. Be sure to include the names of fellows, residents, and/or students you included in the planning process. \*

**Frequency of planning discussions\***

How often do/did planning discussions occur? (Maximum 25 words)

## 2. Professional Practice Gaps

[Click Here for Tips and Examples](#)

**State the professional practice gap(s) of your learners on which the activity is based. \***

The professional-practice gap is the difference between what learners currently know and/or do and what they should know and/or do. *You will report on the extent to which you closed this gap when submitting your Outcome Summary Report at the end of the year.* (Maximum 100 words)

**How did you identify the gap(s)?\***

What data or information did you use to help identify the gap? What is the source of your data or information? (Maximum 100 words)

## 3. Educational Needs

[Click Here for Tips and Examples](#)

a. Needs Explanation \*

Provide a brief explanation of the educational need(s). (Maximum 100 words)

**b. Type of Need\***

Select the type of need(s) that is the basis for your activity. (There may be other educational or non-educational interventions needed to close the gap, but only list here needs that will be addressed by your activity).

Knowledge Need; please explain (Maximum 50 words)

Competence Need; please explain (Maximum 50 words)

Performance Need; please explain (Maximum 50 words)

**What sources did you use to identify educational needs?\***

Check all that apply

- Evaluations from previous year
- Request from learner(s)
- Self-assessment tests
- Patient care audit/QI reports
- Mortality/morbidity statistics
- Faculty perception
- Department/division program priorities
- Survey of target audience
- Other (Maximum 25 words):

**If you checked “*survey of target audience*”, please provide the results of the survey.** What topics were they most interested in learning? If you would prefer to upload your results, please indicate "Summary attached." (Maximum 100 words)

**c. Educational and Non-Educational Strategies**

**What educational activities are necessary to bridge the gap? (Maximum 100 words) \***

**Are you currently using non-educational strategies to address this issue? \***

Examples: sending reminders about techniques or information discussed at a CME activity; patient surveys; physician “report card”; peer feedback; on-demand Web resources.

Yes

No

If yes, what non-educational strategies have you developed to accompany this activity? (Maximum 100 words)

If no, what kinds of non-educational strategies could be used to address this issue?  
(Maximum 50 words)

#### 4. Design Criteria

##### a. Expected Change\*

[Click Here for Tips and Examples](#)

State what this CME activity is designed to change in terms of learner competence, learner performance, patient outcomes, or the learning outcomes of those who your learners teach. At least one of these must be included in the evaluation plan. (Maximum 50 words)

**Designed to change competence** (learners' strategies and/or skills)

Yes

No

**Designed to change performance** (what learners actually do in practice)

Yes

No

**Designed to change patient outcomes** (impact on the patient or on the care delivered)

Yes

No

**Designed to change learning outcomes for residents/students\*** (impact on those who the learners teach)

Yes

No

##### b. Relevant Competencies\*

[Click Here for Tips and Examples](#)

Select the most relevant competency or competencies from the provided lists.

ABMS/ACGME Competencies

- Patient Care and Procedural Skills
- Medical Knowledge
- Practice-based Learning and Improvement
- Interpersonal and Communication Skills
- Professionalism
- Systems-based Practice

National Academy of Medicine (formerly Institute of Medicine) Competencies

- Provide Patient-centered Care
- Work in Interdisciplinary Teams
- Employ Evidence-based Practice
- Apply Quality Improvement
- Utilize Informatics

Interprofessional Education Collaborative Competencies

Values/Ethics for Interprofessional Practice

Roles/Responsibilities

Interprofessional Communication

Teams and Teamwork

Other Competency(ies)

Academy of Medical Educators Competencies

Designing and planning learning experiences and resources

Teaching and facilitating learning

Assessing learning and diagnosing learner needs

Communicating for improvement with learners

Creating an environment for learners' success, well-being, and professional identity formation

**Please briefly explain how the selected competencies address your stated need(s). (Maximum 50 words)**

**c. Learning Objectives**

[Click Here for Tips and Examples](#)

Based on the identified needs, expected changes, and selected competencies, what are the specific learning objectives for this activity? Each learning objective must be assessed and the assessment results used in your analysis presented in the *Outcome Summary Report* that you will submit at the end of the year.

**Objective 1 \***

At the conclusion of the activity, participants will (Maximum 50 words):

**Objective 2 \***

At the conclusion of the activity, participants will (Maximum 50 words):

### Objective 3

At the conclusion of the activity, participants will (Maximum 50 words):

#### 5. [Learning Formats](#) and Presenters

[Click Here for Tips and Examples](#)

What will learners experience in order to achieve the learning objectives?

**Small Group Discussion \***

Yes

No

**Cased-Based Learning \***

Yes

No

**Panel \***

Yes

No

**Demonstration\***

Yes

No

**Role play/dramatization\***

Yes

No

**Virtual learning - synchronous\***

Yes

No

**Lecture \***

Yes

No

**Other \***

Yes

No

Other format type; please describe (Maximum 25 words):

### **Format Explanation \***

Please provide a brief explanation that justifies the selected format(s) as appropriate to the learning objectives. (See examples in the *Tips and Examples*.) (Maximum 100 words)

### **Presenters**

Who will present /facilitate these learning experiences (check all that apply)?

- UNM-affiliated physicians/faculty
- Physicians/faculty from other academic medical centers
- Nonphysician health care professionals
- Residents/fellows
- Patients
- Representatives of public institutions/agencies
- Other presenter; please describe (Maximum 25 words)

### **6. Assessment of Learning\***

[Click Here for Tips and Examples](#)

#### **How will you measure the learning objectives stated above in section 4c?**

Check all that apply. Please compile these measures in your annual *Outcome Summary Report*.

- Knowledge quiz
- Audience response systems (e.g., iClicker, PollEverywhere, etc.)
- Retrospective pretest/posttest
- 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



Explain how your choice(s) above will assess learner competence and/or performance? (Maximum 50 words)\*

## 7. Evaluation of the Learning Program

[Click Here for Tips and Examples](#)

**a. How will you evaluate the activity/program? What measures will you use? If you used non-educational strategies, how will you evaluate them?\***

Please compile these measures for incorporation in your annual *Outcome Summary Report*. (Maximum 50 words)

**b. How will you evaluate the competencies you identified in Section 4b?\*** (Maximum 50 words)

**c. You must evaluate changes in learner competence, performance, patient outcomes, or student/resident learning outcomes that you identified in Section 4a.** You must respond positively to at least one of these four questions and explain your evaluation process.

**i. Will you evaluate changes in learner competence?\***

Yes

No

**If yes, how will you evaluate changes in learner competence? (Maximum 25 words)**

**ii. Will you evaluate changes in learner performance?\***

Yes

No

**If yes, how will you evaluate changes in learner performance? (Maximum 25 words)**

**iii. Will you evaluate changes in patient outcomes?\***

Yes

No

**If yes, how will you evaluate changes in patient outcomes? (Maximum 25 words)**

**iv. Will you evaluate changes in learning outcomes for residents/students?\***

Yes

No

**If yes, how will you evaluate changes in learning outcomes for residents/students? (Maximum 25 words)**

Thank you for your commitment to education. We are here to help you with the application process. For support or questions, please call 505-272-3942 or email [hsc-cpl@salud.unm.edu](mailto:hsc-cpl@salud.unm.edu).

**Attachment reminder**

Please attach the following:

- 1) Meeting notes from your planning process if applicable to section 1
- 2) Survey of Target Audience for possible topics and speakers if applicable to section 3c