

Continuing Education Tips for Success

The following tips are available to guide planning committees in the development of quality continuing education (CE) activities. Contact SHO's CE team by calling 317-692-5222, ext. 283, or by email at ce@suburbanhealth.com, to obtain further guidance.

Organization and Timing

- Develop a planning committee that provides a variety of expertise. When possible, include a physician champion, a quality staff member, an identified nurse planner (minimum of RN, BSN), a SHO CE team member, and someone from the targeted audience on your planning committee. (Involving a SHO CE team member early in the planning process is important to assure all regulations are followed.)
- Engage partners. Are there other groups working on a similar goal? Can you enhance resources or increase efficiency by collaborating on the education?
- Obtain a completed [Disclosure of Relevant Financial Relationships Form](#) on all members to identify and resolve any conflicts of interest as early as possible.
- Select a method of communication between meetings to ensure everyone is kept up-to-date.
- Establish a timeline starting with the date of the activity and working backwards to appropriately determine dates. When determining a timeline, remember activities will not be certified for credits until all required documentation is submitted and processed. Promotional materials may not include reference to CE information until the activity has been certified for credits. CE activities must be planned in collaboration with SHO's CE team. SHO will not "certify" an activity for CEs that a SHO CE team member has not been actively involved.
- Educate committee members upfront on the CE criteria and what is expected of their membership.
- Assign clear roles and responsibilities early in the planning process.

Budget

- Establish a budget that clearly identifies the revenue available and the anticipated expenses.
- Avoid accepting revenue or in-kind services for educational activities based on conditions for the educational event.
- Notify the SHO CE team member of any external funding being considered before entering into an agreement.
- Keep education and promotional events separate.
- Document (keep receipts) and be prepared to provide justification for revenue and expenses.

Speakers or Authors

- Select speakers or content authors based on their knowledge and expertise in the topic area. Do not select someone based on their relationship with a commercial interest or who has been recommended by a commercial interest.
- Obtain a [Disclosure of Relevant Financial Relationships Form](#) from all speakers or content authors to identify and resolve any conflicts of interest as early as possible.
- Provide speakers or content authors with a clear explanation of the expectations and dates items are due. The expectations need to address, not only the compliance with the regulations, but also what the content of their presentation should cover, and what outcomes you are expecting from the learners following the education.
- Follow up with speakers and content authors to remind them of deadlines, regulations, expectations, and to address any questions.
- Maintain documentation of communication with speaker, i.e. speaker agreements, emails, etc.
- Ask speakers to provide references and to plan education based on evidence-based medicine. References will be checked by SHO's CE team.
- Remind speakers of SHO's policy to conduct a review of educational materials prior to the education and that learners will be given the opportunity to evaluate the bias, objectivity, and balance of the educational presentation.

Professional Practice Gaps and Educational Needs

- Analyze the educational needs (knowledge, competency, skills, performance, or patient outcomes) of the targeted audience and their underlying professional practice gaps before developing the agenda and content of the CE activity.
- Document not only what the gap is, but how you know it is a gap. What source was used to identify the gap?
- Link the gap to your learners. If you are using national data, how does it apply or compare to data for your targeted audience?
- Build your agenda topics based on the gaps. What education needs to occur to facilitate a change to decrease the gap?

Targeted Audience

- Identify the audience for the education by discipline, setting, knowledge and skill level, etc.

Educational Format and Learner-Based Objectives

- Apply Adult Learning Principles.
- Plan an educational format (live activity, faculty directed, enduring material, performance improvement, blended, etc.) that will assist in achieving the desired outcome.
- Utilize various teaching methods that will reinforce the message of the education.
- Design education that is appropriate for the knowledge and skill level of the learners. (If the education is basic information and the learners are specialists in the topic area, are you meeting the learners' needs?)

- Select and arrange educational rooms to facilitate the teaching methodology in achieving the desired outcomes. For example, if the teaching methodology is to include small group activities and discussion, classroom seating or round table seating may facilitate this teaching methodology better than theatre seating.
- Develop learner-based objectives that are action-oriented, measurable, can be accomplished in the learning format provided, and can be achieved within the time frame allowed. (If you are asking for them to demonstrate a procedure, are you providing the materials and time necessary to complete the demonstration?)
- Remember, learner-based objectives are the “take home message” and not a description of the education. What will the learner be able to exhibit in order to show he/she is competent?

Promotion

- Plan a variety of promotional types, such as flyers that are posted or distributed, emails, and faxes.
- Submit all promotional materials to SHO’s CE Team for approval before distribution.
- Distribute promotional save the dates early so the targeted audience can reserve the date and time.
- Be patient. If registration is requested, realize most registrants do not register until the last week or two prior to the event.

Evaluation and Outcomes Measurement

- Develop an evaluation method that measures the effectiveness of the educational intervention in meeting the learner-based objectives.
- Avoid asking learners to evaluate the food, facility, and geographical location.
- Assess if the objectives were met.
- Determine a method of measuring the outcome of the education based on the desired change when planning the education. Outcomes may be improving knowledge (learning information that was not previously known), competency (using knowledge to apply strategies in decision-making), skills (how to do), performance (learner’s behavioral change in professional practice) and patient / population outcomes (normally determined based on patient / population data).
- Evaluation questions can be used to determine the outcome of education. For example, self-reported change can be assessed by asking the learner their intent to change. Following up with learners after the educational meeting and asking what changes they implemented in their practice is another method of assessing the change in performance.
- Pre-/Post-Assessments are not required but can be a good way to assess the educational outcomes. Make sure assessments assess the competency and not the knowledge of the learner. Competency assessments may be case-based scenarios where you ask the learner to give you the next step.
- Design a simulation for the learner to demonstrate application of the learned strategies.
- Audience Response Systems encourage involvement from the learners and can be used to help measure outcomes of the education.

- Third party observations or audits may be used to assess a change in performance.
- Collecting data to measure the impact to patients or populations.

Non-Educational Strategies

- Reinforce education by offering post-educational strategies or tips, such as additional reading materials, guidelines, emails with reminders or tips, tools or apps that can be referenced quickly, etc.