ORGANIZATIONAL STRATEGIC PLANNING, BACKWARDS PROGRAM PLANNING AND INSTRUCTIONAL DESIGN

WHY ARE THESE SO IMPORTANT DURING AN INTERNATIONAL PANDEMIC?

JULY 16, 2020
2:00PM-3:00PM
FACULTY AND DISCUSSANTS

- Philip Dombrowski, MBA
- Joseph S. Green, PhD
- Marcia J. Jackson, PhD
TO MAKE CHOICES, ONE MUST BE RUTHLESS IN SETTING PRIORITIES AND MAINTAINING THEM OR RISK BEING UNPREPARED AND DELAYING VITAL ACTIONS.

Attributed to author John Dickerson in a recent book about the US Presidency entitled, *The Hardest Job in the World*
LEARNING OUTCOMES FOR THIS SESSION

- Develop methods for integrating education strategic planning into larger organization planning efforts and to move from CME to CPD
- Create formal backwards program planning processes to start with the end in mind and evaluate outcomes to enhance value to the healthcare setting
- Use the literature on learning and cognition to design activities, select most appropriate content, faculty and educational methods to meet the needs of healthcare professionals
TODAY'S SESSION

- **2:00 pm** Welcome, Introductions and **Strategic Organizational Planning**—Philip Dombrowski
- **2:10pm** Q&A/Discussion
- **2:20pm** Backwards Program Planning and Evaluation—Joseph Green
- **2:30pm** Q&A/Discussion
- **2:40pm** Instructional Design—Marcia Jackson
- **2:50pm** Q&A/Discussion
- **3:00 pm** Conclusion and adjournment
Goal #1. Education Vision and Mission

Goal #8. Leadership, Learning Skills and Organizational Knowledge

Goal #9. Organizational Infrastructure
GOAL #1. EDUCATION, VISION AND MISSION

- Task: # 4. Assess annually the degree to which the educational program fulfilled the organization’s mission
- Task: # 5. Review annually the education strategic plan implementation
GOAL #8. LEADERSHIP AND LEARNING SKILLS

- Task: # 2: Develop training goals, objectives and materials for a staff and clinician leader education program
- Task: # 4: Create a career ladder for faculty development opportunities
- Task: # 6: Establish evaluation criteria to assess effectiveness and impact of efforts to enhance educational skills
GOAL #9. ORGANIZATIONAL INFRASTRUCTURE

- Task #1. Assure that the organization has all important skill sets to accomplish the mission
- Task #2. Implement enhancements or modifications to current organizational infrastructure
STRATEGIC PLANNING MODEL FOR CPD

- Select appropriate goals
- Choose relevant implementation tasks
- Evaluation
ALLIANCE FOR CONTINUING EDUCATION IN THE HEALTH PROFESSIONS

EARLY STAGES OF ADOPTION

- Linked education strategy to mission and vision of the Alliance

- Recently updated core competencies, populated key domains with required knowledge, skills, and attitudes to meet competencies

- Mapped existing educational content to competencies

- Competency-based content to address identified gaps available, more in development

- Curriculum Oversight Committee established to align every educational program with Alliance’s education strategy

- Member self-assessment study in development
Organizational strategic planning gathers crucial information about clinician and healthcare organizational learning gaps and needs. This then will allow for backwards program planning to assure that resultant learning activities will positively impact clinician competence, performance and patient care outcomes.
QUESTIONS?  COMMENTS?  DISCUSSION?
Goal #2. Purposeful Backward Program Planning

Goal #3. Comprehensive learning needs

Goal #7. Evaluation of higher level outcomes
GOAL #2. PURPOSEFUL BACKWARD PROGRAM PLANNING

- Task: # 1. Identify essential elements comprising steps in the program planning process
- Task: # 3. Create training in this process for all involved in planning or implementing learning activities
THE OLD PLANNING PROCESS

- Decide on topic
- Re-tool previous programs
- Location
- Select faculty
- Faculty select content
- Put content into lectures and panels
- Assess success
  - #’s, $$, happiness
NEW PLANNING MODEL—MORE COMPLEX, BUT MUCH MORE EFFECTIVE

- Identify gaps in physician performance
- Measure self-perceived gaps in learner competence
- Delineate desirable outcomes for learning intervention (objectives) based on gaps
  - Create content needed to satisfy objectives
  - Pick most effective methods to meet objectives
  - Select best expert faculty to provide content
  - Determine the success of the activity in relation to desirable outcomes
What is the patient care problem?

Who is involved in this issue?

Is the problem related to patient outcomes, physician behavior, competencies or knowledge?

Can learning experiences impact physician performance?

What are the necessary learning activity outcome measures?

What are the best educational formats and methods to bring about these outcomes?

Who are the best faculty and what is the best content?
GOAL #3. IDENTIFY COMPREHENSIVE LEARNING NEEDS

- Task: # 2. Identify data sources for understanding gaps in competence, performance or patient care outcomes
- Task: # 4. Create needs assessment reports for each identified topic area for CME/CPD activities
BACKWARDS PLANNING FOR OUTCOMES

What are the Problems/Opportunities in healthcare?
Who are the Health professionals involved?
What are the Desired outcome measures of an intervention?
  ➢ Community Health (Level 7)?
  ➢ Patient Health Outcomes (Level 6)?
  ➢ Physician performance in practice (Level 5)?
  ➢ Physician Competence (Level 4)?

Then, what are the necessary Outcomes based objectives?
  ▪ Knowledge
    ▪ Skills
    ▪ Attitudes
“ACHIEVING DESIRED RESULTS AND IMPROVED OUTCOMES: INTEGRATING PLANNING AND ASSESSMENT THROUGHOUT LEARNING ACTIVITIES”

AUTHORS:
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IT IS ALL ABOUT THE “GAP”!

The difference between What is and...

- What ought to be
- What could be
- What is desired
- What peers are doing

As it relates to...

- What a learner knows (knowledge)
- What a learner is capable of performing (competence)
- What a learner actually does in their practice (performance)
GOAL #7. EVALUATE EDUCATIONAL ACTIVITIES AND HIGHER LEVEL OUTCOMES

- Task: # 1. Measure all activities as to levels of outcomes obtained and documented
- Task: # 4. Enhance the use of appropriate evaluation tools and collect highest level outcomes data possible for each learning activity
LEVELS OF OUTCOMES FOR CME:
TARGET OUTCOMES AT LEVELS 4-6!

(1) Participation
(2) Satisfaction
(3) Learning
   (3A) Knows
   (3B) Knows how
(4) Shows how (competence)
(5) Performance in Practice
(6) Patient Health Outcomes
(7) Community health
CRITICALITY OF **EVALUATION & ASSESSMENT** OF EDUCATIONAL OUTCOMES

- Benefits for **planners and learners to know what is known and how much was learned and applied in practice**

- Easy to determine the costs of education—what about having **data on the outcomes of this expenditure**

- Allows for using ‘**backwards planning’ principles to design** and redesign learning activities for impact
IS EDUCATION ALWAYS ENOUGH TO CHANGE PHYSICIAN BEHAVIOR?

*Education is not always adequate to facilitate physician behavior change*

Other non-educational change strategies:

- **Patient education** to facilitate compliance
- **Reminder systems** for drug-drug interactions
- **Use of specific treatment algorithms**
- **Patient feedback** of effectiveness of physician communication
- **Methods to study practice patterns**
Backwards planning gathers crucial information about learning gaps and needs that will be used to develop more effective instructional design and evaluation strategies, based on cognitive and learning theory which will result in better and more measurable learning outcomes.
QUESTIONS?  COMMENTS? DISCUSSION?
1. **Goal #4**: Content, core curriculum and learning gaps

2. **Goal #5**: Meet individual learning needs with education program and learning activities

3. **Goal #6**: Use innovative formats, technology and methods
What is

What ought to be

Why?

Other

Healthcare Team Performance

Root Cause Analysis

Knowledge

Skills

Attitude

Other

Competency Gap

Needs Assessment ➔ Objectives ➔ Program Design
ADDIE

Analyze  Design  Develop  Implement

Evaluate
GOAL #4. CONTENT, CORE CURRICULUM AND LEARNING GAPS

- Task: # 3. Delineate competencies for identified knowledge domains in a core curriculum
- Task: # 4. Make the following planning decisions to meet identified needs: objectives, content, faculty, format, methods, and sequencing
**Competency**: The knowledge, skills, and attitudes that enable one to perform effectively in his/her practice setting and meet the standards of the profession

**Format**: A competency is stated as an observable behavior linked to one or more outcome measures documenting that a health professional remains competent to practice
VALUE OF DEFINED COMPETENCIES

- Individual learning activities “tagged” to core competencies
- Highlights curriculum gaps
- Supports strategic development of new activities
- Provides framework for curriculum and activity evaluation
LEARNING OBJECTIVES

Objectives are critical tools in the design, development, implementation, and evaluation of instruction.
GOAL # 5: MEET INDIVIDUAL LEARNING NEEDS WITH EDUCATION PROGRAM AND LEARNING ACTIVITIES

- Task: # 3: Analyze the amount of current programming directed to each identified target audience
- Task: #4: Determine the extent of revised or new programming needed to health professional or audiences
GOAL # 5: MEET INDIVIDUAL LEARNING NEEDS WITH EDUCATION PROGRAM AND LEARNING ACTIVITIES

What Learners Want...

• Focus on content that is new or changed
• Skip content they already know
• Minimize content that they can easily look up
• Learn at a time and place that is optimal
• Use any device to access digital content
• Have access to expertise for context and mentoring
• Provide targeted and non-punitive testing/feedback
• Know how it really works in practice
• Authentic collaboration with peers during learning
• Practice/simulate as they learn
• Performance support and job aids for transfer
GOAL #6: USE INNOVATIVE FORMATS, TECHNOLOGY AND METHODS

- Task: # 1. Evaluate and prioritize available educational formats and methods
- Task: # 3. Appoint a working group of young faculty to suggest new possible formats consistent with their new learning styles
GOAL #6: USE INNOVATIVE FORMATS, TECHNOLOGY AND METHODS

- Lecture
- Discussion groups
- Demonstration
- Role-play
- Reflection
- Simulation
- Self-assessment
- Other?
WHY IS IT SO IMPORTANT TO LOOK CLOSELY AT THE CPD LEARNING ACTIVITIES WE CREATE AND HOW WE CREATE THEM DURING AN INTERNATIONAL PANDEMIC?

If one is only taking care of the urgent issues, there's no time to identify and solve the challenges that can only be solved through planning and follow through.

Attributed to John Dickerson, the author of a recent book about the US Presidency entitled, *The Hardest Job in the World*
CREATION OF EFFECTIVE INSTRUCTIONAL DESIGN STRATEGIES LEADS TO BETTER DATA ABOUT CLINICIAN LEARNING OUTCOMES

More effective instructional design and evaluation strategies, based on cognitive and learning theory, will result in better and more measurable learning outcomes which directly impacts CPD Organizational effectiveness.
QUESTIONS?  COMMENTS?  DISCUSSION?
Thank you so much and hoping your visions take flight after this pandemic!

Phil, Joe and Marcia