NEEDS ASSESSMENT IN CONTINUING MEDICAL EDUCATION

Diane Burkhart, PhD
Director, Department of Education
January 2010
Implementation Date

July 1, 2009

Board of Trustees Approved
(M/09)

So if you answered “no” you are out of compliance with CME standards
What is Needs Assessment?

It is the **systematic process** of gathering information and using it to determine instructional solutions **to close the GAP** between **what the physician does know** and **what the physician should know** to be competent or an expert in his or her field.
# Needs Assessment Model

<table>
<thead>
<tr>
<th>Actual</th>
<th>Gap</th>
<th>Optimal</th>
</tr>
</thead>
<tbody>
<tr>
<td>What physicians know &amp; do</td>
<td></td>
<td>What physicians should know &amp; do</td>
</tr>
</tbody>
</table>

**Actual**
- What physicians know & do

**Gap**
- Dotted line indicating the gap

**Optimal**
- What physicians should know & do
Identifying Gaps in Knowledge

- Physician Self-assessment
  - Physician Self-testing
  - QA reports
  - Testing – board exam, OCC/MOC, online

- Published or Collected Data
  - Health Care Statistics (National, State, Specialty)
  - Pretest/posttest results
  - Evidence based journals
  - Published quality assurance reports
What is **not** Needs Assessment?

- A survey of your physicians – *in itself*
- What the pharmaceutical company wants to offer
- An offering year after year without data to support need
- Decisions made by staff alone
- A call for presentations to your members
How often should Needs Assessment be done?

- At least annually
- Whenever there is published evidence of change in medical knowledge or application of knowledge
Why Needs Assessment is important?

• Basis for developing learner objectives

• Provides the justification for curriculum/program agenda

• Provides evidence your program is independent of commercial bias

• Required on most grant applications
Planning Committee

- Improves credibility of program
- Determines the target audience
- Charge
  - Agenda and Curriculum
  - Speakers and facilitators
  - Evaluation
- Minutes are important
- Maintain file of topics and data
Four Criteria set last January

• The NA must be conducted on an annual basis for each program
• The NA must be included for each presentation
• The NA must be timely –current for the field
• The NA must be documented, at least one source must be Evidence-Based
Clarification to Sponsors
February 2010

Needs Assessment is not required for

1. OMM/OMT/OPP – State that it is “Part of the Profession” in documentation
2. Core Competencies that are not clinical (Professionalism, Communications, Systems based practice, etc) – State “Core Competency required for specialty”
3. Faculty Development programs
4. State Requirements – such as Risk Management
Updates on Shortcuts
July 2010

• Board Preparation Courses – state “based on pass rate on board scores”
Developing Program Agenda and Curriculum

• Program Agenda – the topics selected for your program and the order they are presented

NEEDS ASSESSMENT

Documentation Required for each topic with noted exceptions
Developing Program Agenda and Curriculum

- Curriculum – after Agenda topics are set
  - Specific content and presentation method
  - Based on learner need (new, middle, expert)

**NO NEEDS ASSESSMENT**

Documentation Required
Good Needs Assessment

• Evidence-Based
• Formal Methods
• Informal Methods
• Statistics tied to specialty and region
• Tied to Each Topic presented
• Conducted annually
Validated Evidence

**Research sources**
- Peer Reviewed Journals
- Internet health statistics
- Specialty health statistics
- Search Entrez-Pub Med (Medline) (NIH and National Library of Medicine)
- Monitor allopathic specialty
- Conference Agenda/Curriculum
- State and national (CDC) postings
- Hospital data / Insurance Data
- Legislative Policy Changes

**Expert Opinion**
Advantages to using a Systems Approach to Program Planning

- Big Picture view of all the components and how they work independently and together
- Ensures nothing is left out and the entire system works effectively and efficiently
- Focus is on achievement, outcomes and improvements rather than discrete pieces of the program
Beyond the Lecture

- Lecture - Most common method of presentation – expedient – facts and figures
- Interactive Presentation – Requires opportunity to ask questions, participant involvement, discovery and self assessment
- Demonstration – Show someone how to do a skill – give opportunity for trying out the skill with feedback
- Case Study – Participants given opportunity to analyze a realistic problem and problem solve with feedback
Needs Assessment and Developing Objectives

- Objectives – measureable through observation or documentation
  - Identify
  - Analysis
  - Discuss
  - Differentiate
  - Demonstrate
  - Perform
  - Increase/Decrease
  - Meet National Standards
Evaluation and Follow-up

• Tie to the objectives based on the Needs Assessment
• Level of Evaluation
  – OUTCOMES MEASUREMENT
  – Did they learn? (knowledge/skill)
  – Did they change behavior? (apply knowledge)
Systems Approach Model

1. Start here
2. Needs Assessment
3. Feedback
4. Set Agenda
5. Set objectives for target audience
6. Tie Methodologies to objectives
7. Establish Budget and Resources
8. Set Environment (time/place)
9. Evaluation and Follow-up

Flow:
- Needs Assessment → Feedback
- Feedback → Set Agenda
- Set Agenda → Set objectives for target audience
- Set objectives for target audience → Tie Methodologies to objectives
- Tie Methodologies to objectives → Establish Budget and Resources
- Establish Budget and Resources → Set Environment (time/place)
- Set Environment (time/place) → Evaluation and Follow-up
- Evaluation and Follow-up → Needs Assessment
- Needs Assessment → Feedback
- Feedback → Set Agenda
### Documentation Example

#### Needs Assessment Form

<table>
<thead>
<tr>
<th>Topics</th>
<th>Evidence/Source</th>
<th>Hours</th>
<th>Link</th>
</tr>
</thead>
<tbody>
<tr>
<td>Advance Imaging Techniques in Arthritis</td>
<td>Radiologic Clinics of North America, Volume 42, Issue 1, Pages 89-107, Tehranzadeh, J; Ashikyan, O; Dascalos, J. 2004</td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>Physician Survey - December 2009</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Contact information

Diane Burkhart, PhD
Director of Education
American Osteopathic Association
Phone – 312 202-8051
Email –

dburkhart@osteopathic.org

Thank you!