

## Continuing Professional Development (CPD)

Active Learning and Assessment  
AACP Annual meeting, Boston

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Director of Pharmacotherapy Services, Wake Area  
Health Education Center

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## Learning Objectives

- At the end of the program the participant should be able to:
  - Discuss the assessment of portfolios
  
  - Discuss implementation and assessment strategies related to active learning in continuing education

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## Outline

- Review the NC CPD story
- Strategy for spread
- How we started
- Where we are now
- Where we are going
- How we propose to get there

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## Definition of CPD

- Self-directed, ongoing, systematic and outcomes-focused approach to learning and professional development  
– Adopted by CPD Pilot May 2006
- National spread champions
  - Jen Moulton, RPh
  - Mike Rouse, BPharm
  - IA, IN, WA, WI, NC

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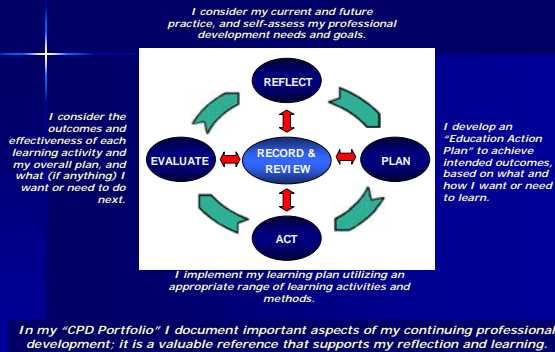
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## Continuing Professional Development Cycle



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## CPD NC Team

- Toyin Tofade, MS, PharmD, BCPS
- Leigh Foushee, PharmD, CPP
- Stephen Eckel, PharmD, MHA, BCPS
- Steve Caiola, MS
- Initial spread champions
  - Fred Eckel MS, Executive Director NCAP
  - Jay Campbell, Executive Director Board of Pharmacy

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## Tips from the NC Pilot

- Reflect is essential and gets better as we go
- People will need a lot of support early on
- Go through the process yourself at least once
- Listen to the participants and adapt accordingly
- Include a diverse group of practitioners in your roll out team

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## Other Tips

- Start with the motivated ones first.
- If you don't buy in they won't
- Construct a plan to collect outcomes data
- We are still learning....

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## Strategy For Spread

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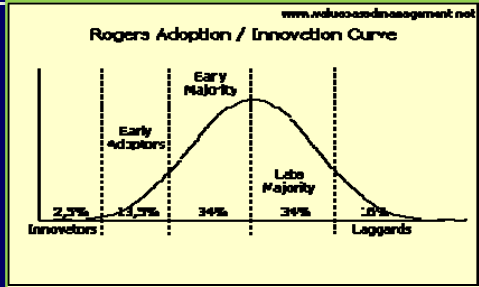
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## Innovation Adoption Curve



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## How We Started

- NC Association Pharmacists
- Tripartite Committee
- Board of pharmacy Executive director
- Leadership forum
- NCAP information sessions
- Other schools of pharmacy
- SE Executive Association leaders
- UNC Division of Pharmacy Practice and Experiential Education Strategic plan-2008
- ACPE standards 2007

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## North Carolina CPD Learning Portfolio



A tool developed to assist pharmacists as they plan, record, and reflect upon their learning activities.

Adapted with permission from the



Ontario College of Pharmacists

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# Education Action Plan

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**EDUCATION ACTION PLAN**

Name: \_\_\_\_\_ Date: \_\_\_\_\_

Required activity. Used to plan activities after identifying learning needs from practice review and professional development summary. Record this in case of an audit where hours are not yet completed.

Broad Goal	What do you want to learn?		What resource will you use? (See learning activity worksheet for activities)	When do you plan to start this Learning Activity?	When do you plan to finish?	Learning activity complete? (Yes/No)
	SMART Learning Objective	Learning Activities (reference #)				
			<input type="checkbox"/> Home study program <input type="checkbox"/> Discussion(s) with colleague(s) <input type="checkbox"/> Live workshop, course, or conference <input type="checkbox"/> Reading articles <input type="checkbox"/> Internet search <input type="checkbox"/> Literature search <input type="checkbox"/> Other			
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			<input type="checkbox"/> Home study program <input type="checkbox"/> Discussion(s) with colleague(s) <input type="checkbox"/> Live workshop, course, or conference <input type="checkbox"/> Reading articles <input type="checkbox"/> Internet search <input type="checkbox"/> Literature search <input type="checkbox"/> Other			

\*Specify - Does the action goal fit your primary goal? Are you going to do this activity as a result of the activity? Measureable - Can you measure the change in practice? Achievable - Is the action goal challenging, and yet realistic, achievable? Related - Does the action goal relate to the specialty for you, and comply with policy or perhaps to a future identified need? Timed - When will you finish it date by, and when will you reach goal? (1)

FOR OFFICE USE ONLY: If added to the Board Learning Log, Date Entered: \_\_\_\_\_ Date of Follow up: \_\_\_\_\_

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# Review Learning Activity Worksheet

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**LEARNING ACTIVITY WORKSHEET**

Name \_\_\_\_\_ Date \_\_\_\_\_  
 Time engaged in this learning activity \_\_\_\_\_  
**Required activity: Complete this for every learning activity.**

# \_\_\_\_\_

What did you want to learn from this activity? \_\_\_\_\_  
 \_\_\_\_\_

Is there any pertinent background information? \_\_\_\_\_  
 \_\_\_\_\_

Does this relate to a previously identified need or goal? Circle Yes No  
 if so, determine if a new need or goal should be created.

What was your learning stimulus for this activity? *Mark all that apply.*

- Completing a self-assessment
- Discussion with peers or other healthcare professionals
- Managing a patient or practice related problem
- Receiving feedback about my practice (practice review, performance appraisal)
- Participating in a CE program, indicate LIVE PRINT ONLINE
- Reading literature
- Performing research or preparing for a presentation
- Teaching, serving as a preceptor
- Other, describe \_\_\_\_\_

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What resources did you use to achieve your learning need from this activity? *Mark all that apply.*

- Home study program
- Discussion(s) with colleagues
- Live workshop, course, or conference
- Reading articles, citation(s) \_\_\_\_\_
- Internet search, website(s) \_\_\_\_\_
- Literature search, resource(s) \_\_\_\_\_
- Other, describe \_\_\_\_\_

Were your learning needs met? Circle Fully Partially Not at all  
 If partially or not at all met, what challenges/obstacles did you encounter and how may they be overcome? \_\_\_\_\_  
 \_\_\_\_\_

What did you learn? \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

How will this new knowledge influence your practice? \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

What, if any, new learning needs were identified as a result of this learning experience? \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

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## Record and Review

Tying it to Portfolios and  
Performance Appraisal

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**PROFESSIONAL YEAR END SUMMARY**

Name: \_\_\_\_\_ Date: \_\_\_\_\_  
 Use this to summarize accomplished goals and objectives during the year. Complete this as part of a year-end reflective performance assessment or improvement process.

**Accomplished Goals and Objectives** (Number of patients or consults, interventions made, cost savings, certificates, awards, presentations, publications, technical assistance, committees, community or volunteer work, preceptorship or other activities)

Dates	Goal/Objective	Attitude/Skill/Knowledge Developed <i>How did this accomplishment help you develop as a practitioner?</i>

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- ## Where We Are
- The board has adopted CPD as a way to learn and renew pharmacist licensure in NC
  - CPD Webtool designed by the Board's IS team under the leadership of Leigh Foushee and team
  - First opportunity to renew licensure using CPD was Dec 2008
  - Several training sessions have been scheduled across the state and are being conducted
  - Largest organizations trained and expressing interest right now are CVS and the AHEC regions
  - Other interest in Hospital Pharmacy Management-WakeMed

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- ## BOP Web Tool – Building Your Portfolio
- [www.ncbop.org](http://www.ncbop.org) Pharmacist, CPD
  - <https://www.ncbop1.org/CPDTest>
  - Log in (license #, last 4 SSN)
  - "Needs Assessment" - 1706
  - Add "Details" - Assess the CPD process to determine if it will improve my ability to be a self-directed learner.
  - "Add Doc" – complete as appropriate to you

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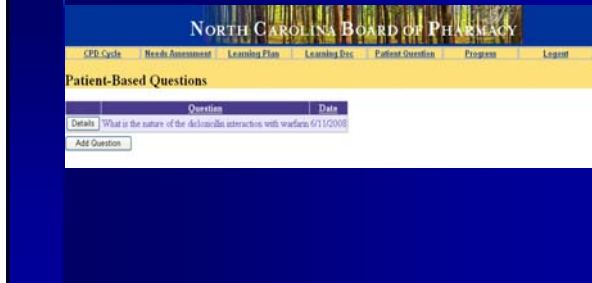
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## BOP Web Tool – Unplanned Learning Activity



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## BOP Web Tool “Kinks”

- Deselecting in Needs Assessment
- Adding up total hours
- Cross over between the 2 databases
- Printable version of the data entered

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## Review the Professional Year End Summary Tool

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## Sample Wake AHEC Employee Education Plan

What do you want to learn? (Write your goals below. They should be specific, measurable, achievable, relevant & with a time frame.)	What will be your learning activity(ies)? (Examples are workshops, field trips, conferences, readings, internet or library searches, mentoring/other help, committees, or other. Be as specific as possible.)	When will you start?	When will you complete?	Midyear Update: Complete this column and share with your manager/supervisor. What did you learn? How will this influence your work?
Topic: Confidence in Literature Appraisal Goal: Develop a process to effectively and efficiently conduct a critical appraisal of relevant medical literature by 6/09.	<ul style="list-style-type: none"> <li>Set aside time each month to review 1 practice related article and complete a CAT.</li> <li>Complete the Seminar Concordance Toolkit modules on the topic.</li> <li>Finish reading Evidence Based Pharmacotherapy.</li> <li>Attend a seminar or conference on the topic.</li> <li>Report out 1 CAT at the WakeAHEC Pharmacotherapy Faculty Meeting on a quarterly basis.</li> </ul>	Aug 08	July 09	
		Sept 08	Nov 08	
		June 08	Dec 08	
		?	July 09	
		Nov 08 (4 <sup>th</sup> qtr)	July 09	

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## Potential Portfolio Tabs

- Education Plan
  - Mastery in Evidence Based Medicine
  - Establish a new collaborative with an Ambulatory Care Clinic
  - QI Project Related to Health Literacy and Medication Therapy Management
  - Assess the impact of pharmacy CE.
  - National Networking and Cutting Edge Programming

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## Potential Portfolio Tabs

- Point of Care learning/learning that begins with ACT
- Continuing Pharmacy Education conferences
- Informal Learning
  - Journal clubs
  - Association meetings

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## Where We Are Going

- Upgrade Webtool with feedback from roll out
- Incorporate CPD into Pharmacy student curriculum
  - Pilot a CPD program with the PY4 Wake AHEC cohort of students-July 31<sup>st</sup> '09
  - Introduce CPD into the UNC Eshelman SOP(UNCESOP) curriculum
  - Start with rising PY2 students

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## How We Propose To Get There

- Faculty
  - Attend training for key instructors in the UNC ESOP Division of Pharmacy Practice and Experiential Education-July 16, 2009
  - Review proposed plan for student roll out with curriculum + assessment committee
  - Discuss and adopt CPD assessment method
  - Introduce CPD into PY1 didactic instruction Spring 2010

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## How We Propose To Get There

- Students
  - Reflect on learning at the end of PY1 year
  - Conduct a CPD education plan prior to IPPE summer rotation
  - Act on CPD plan during IPPE rotation
  - Evaluate and reflect on learning during IPPE rotation
  - Construct an education plan for entering PY2 didactic year

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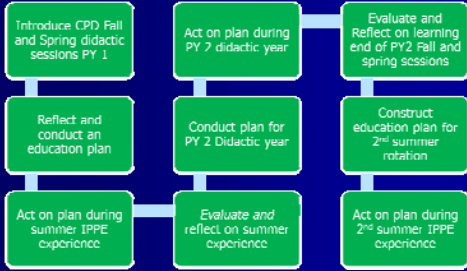
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## Proposed process



Repeat above process for subsequent years

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## Initial Thoughts On Assessment

- Utilize trained CPD faculty actively using CPD in their practice
- Develop a pipeline of trained upper classmen to serve as assessors of portfolios and learning mentors for younger classmen (e.g. PY4-PY2, PY3-PY1)
- Involve the faculty and residents for assessing the upper classmen

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## Summary

- We reviewed
  - The NC CPD story
  - Strategy for spread
  - How we started
  - Where we are now
  - Where we are going
  - Our proposal for getting there

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# QUESTIONS?

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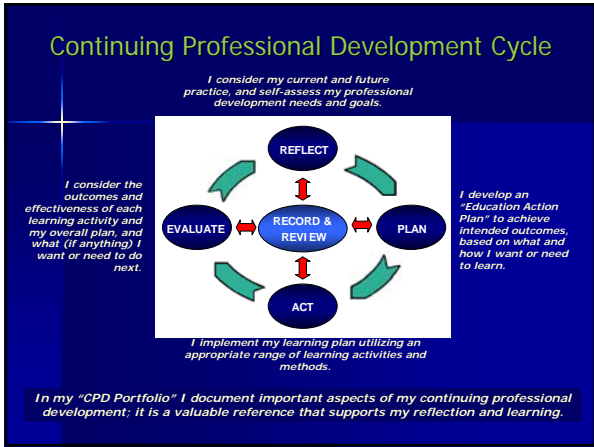
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