ACPE Spring Education Conference 2019

CPE Professional Self-Assessment Worksheet

Using the behaviors outlined in the National Learning Competencies[1], please conduct an assessment of the competency areas listed below by selecting the most appropriate option as it relates to your proficiency.

A: I am confident of my knowledge and skills in this area and have no current learning needs or interests.
B: I am confident in this area but I am interested in advancing my knowledge and skills.
C: I would like to be more confident in this area and would benefit from further education and/or training.

	A	B	C
1. Using Adult and Organizational Learning Principles *Use evidenced-based adult and organizational learning principles to improve the performance of healthcare professionals, the healthcare team and the organizations in which they work, in order to improve patient outcomes.*			
Competency 1.1 Apply adult learning principles in CE activities/interventions and overall program planning.			
Competency 1.2 Apply organizational learning principles in CE activities/interventions and overall program planning			
2. Designing Educational Interventions *Implement and improve independent, fair, balanced, and evidenced-based educational interventions that produce expected results for learners and the organizations in which they work.*			
Competency 2.1 Implement CE activities/interventions to address healthcare professionals' practice gaps and underlying learning needs.			
Competency 2.2 Develop CE activities/interventions with content that is valid, independent from the influence of commercial interests, balanced and evidence-based.			
3. Measuring the Performance of CE Activities and the Overall CE Program *Use data to evaluate the effectiveness of CE activities/interventions and the impact of the overall CE program.*			
Competency 3.1 Use evaluation and outcomes data to assess and determine: 1. the educational outcomes/results of CE activities/interventions on participants' attitudes, knowledge, skills, performance and/or patient outcomes, 2. unmet learning needs, and 3. the quality and success of CE activities/interventions			
Competency 3.2 Use evaluation and outcomes data to evaluate the impact of the overall CE program and its effectiveness in meeting the CE mission and relevant organizational goals.			

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4. Collaborating and Partnering with Stakeholders			
Collaborate and partner with stakeholders to help meet the CE mission.			
Competency 4.1 Collaborate with internal stakeholder groups that can help maximize the impact of CE activities/interventions and meet the CE mission.			
Competency 4.2 Collaborate with external stakeholder groups and key partners that can help maximize the impact of CE activities/interventions and meet the CE mission.			
5. Manage and Administer the CE Program			
Manage and administer the CE office operations to meet personnel, financial, legal, logistical, accreditation, CE credit, and/or regulatory standards			
Competency 5.1 Execute CE activities and the CE program following sound and applicable business policies and practices.			
Competency 5.2 Execute CE activities and the overall CE program in compliance with applicable accreditation and/or regulatory policies and requirements.			
Competency 5.3 Utilize effective management and communication skills when working with organizational leaders, staff, volunteers, peers, and learners.			
6. Lead the CE Program			
Provide Leadership for the CE Program.			
Competency 6.1 Conduct all affairs with high standards of professionalism and ethics.			
Competency 6.2 Model and inspire a vision of present value and future direction for CE – externally and internally.			
Competency 6.3 Develop and model a learning organization.			
Competency 6.4 Advocate for the CEhp program, its mission, activities, staff and volunteers.			
7. Engage in Self-Assessment and Lifelong Learning			
Continually assess individual performance and CE program impact and make improvements through relevant learning experiences.			
Competency 7.1 Engage in assessments and professional development to help identify and then close *one's own* knowledge, competence, and performance gaps.			
Competency 7.2 Engage in assessments and professional development to help maintain and/or improve the performance of the CE program.			
Competency 7.3 Actively participate in the profession of CE in order to model lifelong learning.			

8. Engaging in Systems Thinking in CE			
Approach the practice of CE from a system-thinking perspective, recognizing that a team of healthcare professionals that are part of a complex healthcare system delivers patient care.			
Competency 8.1 Integrate into the design and assessment of educational activities/interventions a systems-based approach to identifying and closing gaps in healthcare.			

Additional reflection questions

Based on your role, consider the following:

List work-related situations in which you have felt confident or competent:

What knowledge/skill(s)/attribute(s) contributed to the successes above?
(You may want to create a learning objective to further develop this skill/strength)

List work-related situations in which you would like to feel more comfortable or confident:

What knowledge/skill(s) would you like to develop or improve to better manage similar situations in the future?

CE Professional Personal Development Plan

Based on your reflection and self-assessment, select at least one competency area in which you would like to continue to develop your abilities. Describe in general terms how you would like to develop yourself in this area along with SMART learning objective(s) to achieve your goal.

S = SPECIFIC *(describe what you want to learn in a very specific, defined way)*
M = MEASURABLE *(what you want to learn must be easily measurable so that you can monitor progress and know when you have achieved your objective)*
A = ACHIEVABLE *(the objective must be realistic in terms of its scope and the time that you will need to achieve it; don't be too ambitious)*
R = RELEVANT *(what you want or need to learn should be relevant to the work that you do on a regular basis; if you can **apply** what you have learned, the learning will be more effective, sustained and impactful)*
T = TIMED *(you should set a specific date by which the objective will be achieved – should be reasonable)*

Additionally, for each learning objective briefly describe what learning activities (formal and informal) you plan to undertake to achieve the objective and what other resources (human, educational, etc.) you will use.

When you list the activities and resources that you will use, considering the following formal and informal learning activities, if they are applicable:

- Academic/Professional Study
  - Conferences, workshops, certificate courses
  - Academic coursework, postgraduate education, independent study
  - Reading and reflecting on articles and literature searches
- Scholarly Activities
  - Conducting research in one's professional field
  - Presenting, publishing scholarly works
  - Serving as content reviewer for publications, dissertation
- Teaching/Mentoring
  - Presenting and/or authoring educational content
  - Peer coaching or mentoring programs (e.g. mentor or mentee)
- Workplace Activities
  - Discussion(s) with colleague(s)
  - In-service training to learn a new skill
  - Job shadowing
  - Preparing for or participating in accreditation review
- Professional Service
  - Serving on a committee, workgroup, or holding office
  - Active involvement in professional associations/organizations
  - Volunteer experiences or special interest groups
- Other activities which aid in meeting professional development needs and goals

Competency:
How you would like to develop this area, e.g., education-related goal?
List associated SMART learning objective(s):
Description of planned learning activities and timeline:

SMART Learning Objective(s) What did you want to learn?	Learning Activities & Resources What did you use to achieve your objective?	Evaluation of Learning (EVALUATE) Rate the impact of each activity on knowledge and/or abilities	Outcomes/Impact (APPLY) Identify outcome(s) that apply to this learning activity
Competency:			

		Did your knowledge/abilities:
		A. *Stay the same*
		B. *Improve somewhat, but I was hoping to learn more*
		C. *Improve somewhat, and I am satisfied with my knowledge/ability*
		D. *Improve greatly, but I still want to learn more*
		E. *Improve greatly, and I am satisfied with my knowledge/ability*
		
		If you answered B or D above, what more do you want/need to learn?
			What is the outcome of this activity?
			A. *No change/reinforced my current practice/professional habits*
			B. *I implemented what I learned in my practice*
			C. *In progress*
			  a. *More information/learning is needed*
			  b. *Modification of goals/objectives*
			  c. *Additional reflection on professional development needs*
			  d. *Other_____*
			
			How did implementation impact your practice?

		Did your knowledge/abilities:
		A. *Stay the same*
		B. *Improve somewhat, but I was hoping to learn more*
		C. *Improve somewhat, and I am satisfied with my knowledge/ability*
		D. *Improve greatly, but I still want to learn more*
		E. *Improve greatly, and I am satisfied with my knowledge/ability*
		
		If you answered B or D above, what more do you want/need to learn?
			What is the outcome of this activity?
			A. *No change/reinforced my current practice/professional habits*
			B. *I implemented what I learned in my practice*
			C. *In progress*
			  a. *More information/learning is needed*
			  b. *Modification of goals/objectives*
			  c. *Additional reflection on professional development needs*
			  d. *Other_____*
			
			How did implementation impact your practice?

The Alliance for Continuing Education in the Health Professions
National Learning Competencies

	Competency Area 1: Use of Adult and Organizational Learning Principles
	Use evidenced-based adult and organizational learning principles to improve the performance of healthcare professionals, the healthcare team and the organizations in which they work, in order to improve patient outcomes
	Competency Statement
Competency 1.1	**Apply** adult learning principles in CEhp activities/interventions and overall program planning by… A. **Identifying** sources and resources about applicable and appropriate adult learning principles and practices that can be used to support healthcare professionals, and healthcare teams', learning and change. B. **Describing** how effective use of applicable and appropriate *adult* learning principles can facilitate learning and change in healthcare professionals. C. **Designing** CEhp activities/interventions based on best practices and emerging research.
Competency 1.2	**Apply** organizational learning principles in CEhp activities/interventions and overall program planning by… A. **Identifying** sources and resources about applicable and appropriate organizational learning principles and practices that can be used to support program and organizational learning and change. B. **Describing** how effective use of applicable and appropriate *organizational* learning principles can facilitate learning and change in the organizations in which healthcare professionals work. C. **Developing** one's CEHP program and/or organization based on best practices and emerging research.

	Competency Area 2: Designing Educational Interventions
	Implement and improve independent, fair, balanced, and evidenced-based educational interventions that produce expected results for learners and the organizations in which they work.
	Competency Statement
Competency 2.1	**Implement** CEhp activities/interventions to address healthcare professionals' practice gaps and underlying learning needs by.… A. *Identifying* data and other sources that can help reveal healthcare professionals' practice gaps and learning needs. B. *Using* data and information related to healthcare professionals' practice gaps and learning needs to design CEHP activities/interventions. C. *Developing* learning objectives for CEhp activities that clearly describe the intended behavior/action of the learner after engaging in the CEhp activity/intervention. D. **Creating** CEhp activities/interventions using formats that are selected based on objectives and expected results E. **Creating** Interprofessional CEhp activities for the healthcare team, when appropriate.
Competency 2.2	**Develop** CEhp activities/interventions with content that is valid, independent from the influence of commercial interests, balanced and evidenced based by… A. *Implementing* appropriate process(es) to help ensure CEhp content is valid, independent from the influence of commercial interests, and free from commercial bias. B. *Utilizing* strategies to ensure CEhp content is modified prior to an activity, and processes are reviewed for future activities, if problems are detected with the balance, independence, or validity of a CEhp activity's content.

	Competency Area 3: Measuring the Effectiveness of CEhp Activities and the impact of the Overall CEhp Program
	Use data to evaluate the effectiveness of CEhp activities/interventions and the impact of the overall CEhp program.
	Competency Statement
Competency 3.1	**Use** evaluation and outcomes data to: (1) assess the educational outcomes/results of the CEhp activities/ interventions on participants' attitudes, knowledge levels, skills, performance and/or patient outcomes, (2) determine unmet learning needs and (3) assess the quality and success of CEhp activities/interventions. A. **Identifying** the level(s) of outcome associated with objectives and expected results of the CEhp activity/intervention B. **Selecting** assessment methods and tools that are appropriate for the goals and objectives of the CEhp activity/intervention, based on the CEHP practice setting and resources (e.g., time, expertise, staff, budget, stakeholder expectations). C. **Analyzing** assessment data in order to draw conclusions about the effectiveness of the CEhp activity/Intervention, based on expected results. D. **Analyzing** assessment data in order to identify learning needs that future CEhp activities/interventions can address.
Competency 3.2	**Use** evaluation and outcomes data to evaluate the impact of the CEHP program meeting its mission and relevant organizational goals. A. *Outlining* steps to evaluate the impact of the CEhp program and its effectiveness in meeting mission and relevant organizational goals. B. *Utilizing* activity evaluation data, and other relevant information, to assess the impact of the overall CEhp program and the extent to which the CEhp mission and relevant organizational goals were met. C. *Identifying* areas for improvement within the CEhp program and individual CEhp activities based on the overall CEhp program evaluation process.

	Competency Area 4: Collaborating and Partnering with Stakeholders
	Collaborate and partner with stakeholders to help meet the CEhp mission.
	Competency Statement
Competency 4.1	**Collaborate** with internal stakeholder groups that can help maximize the impact of CEhp activities/interventions and meet the CEhp mission by… A. **Identifying** opportunities for internal collaborations that can help the CEhp program meet its mission (e.g., conduct an internal stakeholders analysis) B. **Implementing** an ongoing, collaborative communication plan with internal stakeholders C. **Evaluating** the extent to which the collaboration helped achieve a CEhp activity/intervention's goals and objectives D. **Evaluating** the extent to which the collaboration helped the CEhp program meet its mission

Competency 4.2	**Collaborate** with external stakeholder groups and key partners that can help maximize the impact of CEhp activities/interventions and meet the CEhp mission by…
	  A. **Identifying** opportunities for external collaborations that can help the CEhp program meet its mission (e.g., conduct an external stakeholders analysis)
	  B. **Implementing** an ongoing, collaborative communication plan with external stakeholders
	  C. **Evaluating** the extent to which the collaboration helped achieve a CEHP activity/intervention's goals and objectives
	  D. **Evaluating** the extent to which the collaboration helped the CEhp program meet its mission
	  E. **Maintaining** compliance with applicable regulations when collaborating with external stakeholders

Competency Area 5: Manage and Administer the CE Program
Manage and administer the CEhp office operations to meet personnel, financial, legal, logistical, accreditation, CE credit, and/or regulatory standards
Competency Statement

Competency 5.1	**Execute** CEhp activities and the CEhp program following sound and applicable business policies and practices by….
	  A. *Implementing* basic accounting, financial management, and human resource practices in compliance with organizational policies and procedures.
	  B. *Creating* and/or interpret CEhp activity/intervention and CEhp program budgets, along with income and expense statements.
	  C. *Producing* CEhp activities/interventions and administer the CEHP program in compliance with local, regional, state and federal laws and regulations.
	  D. *Integrating* effective meeting planning and hospitality management practices into the planning and production of CEhp activities.
	  E. *Utilizing* current and appropriate databases, software, and other technologies in the execution of CEHP activities /interventions and the overall CEhp program.

Competency 5.2	**Execute** CEhp activities and the overall CEhp program in compliance with applicable accreditation and/or regulatory policies and requirements by…
	  A. *Adhering* to the accreditation and/or regulatory policies and requirements that are applicable to an overall CEHP program based on its organization type and location.
	  B. *Adhering* to the accreditation and/or regulatory policies and requirements that are applicable to a CEHP activity/intervention based on its format and content.
	  C. *Identifying* how other accreditation and/or regulatory policies and requirements (not directly applicable to the organization) impact partnerships and collaborations in CEhp activities/interventions.
	  D. *Utilizing* materials from the implementation of CEhp activities and the administration of the overall CEhp program to demonstrate compliance with applicable accreditation and/or regulatory policies and requirements.

Competency 5.3	**Utilize** effective management and communication skills when working with organizational leaders, staff, volunteers, peers, and learners by…
	  A. *Implementing* effective communication skills in written correspondence, face-to-face interactions, and public speaking.
	  B. *Utilizing* effective management skills to delegate, supervise, and evaluate staff.
	  C. *Setting* and communicate expectations of staff and volunteers, providing feedback, and offering support to accomplish goals.
	  D. *Promoting* teamwork and team-building in the administration of the overall CEhp program.

	Competency Area 6: Providing Leadership for the CEhp Program
	Provide Leadership for the CEhp Program
	Competency Statement
Competency 6.1	**Conduct** all affairs with high standards of professionalism and ethics by… A. *Adhering* to ethical standards for CEhp professionals and related fields B. *Providing* resources to help others learn about ethics and professionalism in CEhp C. **Providing** mechanisms and support to help other identify and address ethical dilemmas
Competency 6.2	**Model and Inspire** a vision of present value and future direction for CEhp – externally and internally by… *A.* *Engaging* staff in scanning the current and emerging environment for its impact on CEhp B. *Recognizing* current and potential new connections between one's own CEhp program with the current and emerging environment for CEhp, healthcare professionals, and stakeholders C. *Implementing* a mission-aligned strategic plan that is a bridge to the organization's vision that includes goals, objectives, tasks and milestones for success.
Competency 6.3	**Develop and model** a learning organization by… A. *Creating* mechanisms and practices that involve stakeholders in developing solutions to identified problems B. *Linking* principles of continuous quality improvement to CEhp activities, the CEhp program, and overall organizational improvement C. *Utilizing* collaborations with internal and external stakeholders to support organizational learning and improvement D. *Creating* an environment that embraces learning and change
Competency 6.4	**Be an advocate** for the CEHP program, its mission, activities, staff and volunteers by… A. *Recognizing* the success and potential areas of improvement of one's own CEhp program B. *Encouraging* opportunities for staff to participate in professional activities that can highlight and expand their abilities C. *Recognizing* the achievements of staff and volunteers D. *Sharing* experiences and achievements with the CEhp community through publications and presentations

	Competency Area 7: Engage in self-assessment and lifelong learning
	Continually assess individual performance and CEhp program impact and make improvements through relevant learning experiences.
	Competency Statement
Competency 7.1	**Engage** in assessments and professional development to help identify and then close *one's own* knowledge, competence, and performance gaps by…. A. *Participating* in self-assessments and stay abreast of the CEHP environment to identify gaps in one's own CEhp knowledge, competence and performance. B. *Creating* an individual learning plan for improvement with personal goals and objectives that would address the identified gaps. C. *Participating* in professional development opportunities that would address identified gaps. D. *Modifying* one's own practice of CEhp to close identified gaps. E. *Seeking* out opportunities for feedback on new and/or modified practices

Competency 7.2	**Engage** in assessments and professional development to help maintain and/or improve *the performance of the CEhp program* by…
	   A. ***Comparing*** the CEhp program's performance to standards of practice and/or emerging trends to identify areas of improvement.
	   B. ***Creating*** an improvement plan for the CEhp program with goals and objectives that would address needed and desired changes.
	   C. ***Participating*** in training and learning opportunities that help support implementation of the improvement plan.
	   D. ***Making*** modifications to the CEhp program to address areas of improvement
	   E. ***Seeking*** out opportunities for feedback on new and/or modified CEhp program practices

Competency 7.3	**Actively participate** in the profession of CEhp in order to model lifelong learning by…
	   A. ***Exploring*** opportunities to volunteer for professional and/or regulatory organizations in CEhp
	   B. ***Sharing*** best practices and experiences at local, regional, and/or national meetings of CEhp professionals
	   C. ***Disseminating*** best practices, experiences, and/or findings from one's own research and scholarship in CEhp via journals, newsletters, and other publications
	   D. ***Engaging*** in CEhp social media communications

Competency Area 8: Engaging in Systems Thinking in CEhp
Approach the practice of CEhp from a system-thinking perspective, recognizing that a team of healthcare professionals that are part of a complex healthcare system delivers patient care.
Competency Statement

Competency 8.1	**Integrate** into the design and assessment of educational activities/interventions a systems-based approach to identifying and closing gaps in healthcare by…
	   A. ***Evaluating*** quality and performance gaps for systems-based issues (e.g., structures and processes) that can be addressed within CEhp activities/interventions
	   B. ***Addressing*** systems-based issues that are barriers to change and the implementation of new knowledge and skill
	   C. ***Assessing*** improvements in team performance.
	   D. *Developing* CEhp content that supports collaborative practice within the inter-professional healthcare team