



## Achievement and Impact of CPE Mission and Goals



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## Objectives

- Define the concept of a mission statement for your CPE program.
- Identify stakeholder groups that should be involved in development and review of achievement of the mission statement.
- Given a sample mission and goals, create an assessment plan including types of data that may be collected to demonstrate achievement.
- Discuss how evaluating the mission and goals can be used for improving the CPE enterprise.



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# Mission



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## Why are we talking about mission statements?

- **ACPE requires a mission statement**
  - **Standard 1: Achievement of Mission and Goals of the CPE Program**
    - The provider **must** develop a **CPE mission statement** that **defines the basis** and **intended outcomes** for the majority of educational activities the provider offers.



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## More importantly

- Developing a vision and mission statement is essential to the success of your initiatives
- Explains your organization's aspirations
- Helps focus on what is important
- Provides a basis for development



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## First, Let's talk "vision" versus "mission"

- A **vision statement** describes what a provider aspires to achieve upon fulfilling its mission
- One-sentence statement
  - Forward looking
  - Describes the "ideal" state the provider hopes to achieve
  - Both inspirational and aspirational
- Questions to consider when drafting vision statements:
  - What issues are we seeking to address?
  - Where are we headed?
  - If we achieved all strategic goals, what would we achieve?



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## Example Vision Statements

- Striving to be the world's leader in patient experience, clinical outcomes, research and education (Cleveland Clinic)
- A world where our community of educators supports clinicians in delivering optimal healthcare for all (ACCME)
- To be the premier provider for continuing education and training (Nova Southeastern College of Dental Medicine)
- To be the leader in pharmacy professional development by providing exemplary educational programs that will ultimately result in enhanced patient health outcomes through the optimal development of medications and their safe/effective use (University of Wisconsin)



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## Example Vision Statement

- To be recognized as a national leader in continuing and professional education
- To improve healthcare in the greater Chicago area
- To reduce the incidence of cancer in the United States



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## What is a mission statement?

- A **mission statement** is an action-oriented vision statement
  - Declares the core purpose an organization serves
  - Often includes a general description of the organization, its function, and its objectives.
  - Clarifies:
    - what (what do we do?)
    - who (whom do we serve?)
    - why (what is the benefit?)
  - Provides a roadmap for the company's vision statement



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## Mission provides the foundation

- Keeps everyone connected
- Says why you exist; what is your purpose
- Keeps everyone moving in the right direction



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## Standard 1:ACPE Guidance

- CPE program mission statement
  - Indicate short-term intent in conducting CPE activities
  - Identify the intended audience and scope of activities
  - Address how a provider will assist pharmacists and/or pharmacy technicians to maintain and enhance their professional competencies to practice in various settings



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## Exercise: Develop vision and mission statements

- State Pharmacy Association
  - Affiliate of American Society of Health-System Pharmacists
  - Pharmacy and Technicians
  - Annual meeting and home-study activities



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## Exercise: Example Mission Statement

- The expected results of the provider's educational activities are for pharmacists and other health care professionals to provide the highest level of patient-centered care and education to individuals with cancer and their families by utilizing evidence-based medicine and/or best practices

**Thoughts?**



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## Developing/Revising Your Mission Statement

- Engage Stakeholders
  - To ensure the mission reflects the program, input from a comprehensive array of stakeholders should be obtained.
- Stakeholder analysis
  - Scan the environment and compile a listing of all possible stakeholders who may have an interest in the outcomes of the program

## Stakeholders

- Internal and external stakeholder identification
  - Organizational Staff
  - Learners/participants
  - CE Committee Members
  - Faculty
  - Patients
  - Joint Sponsors



## Vision, Mission, Strategies, Goals. . .

- **Mission** is a general statement of how vision will be achieved
- **Strategies** are a series of ways of using the **mission** to achieve the vision
- **Goals** are statements of what needs to be accomplished to implement the strategy
- Objectives are specific actions and timelines for achieving the **goal**

## Developing your goals



- The 'To Do' in order to meet the mission
- Strategic or annual plan
- Specific and measurable
- Evaluation
- Re-evaluate goals and mission



## Exercise: Goal Statements

- Example Mission:
  - The Pharmacists Association seeks to provide CPE activities to pharmacists and pharmacy technicians in order to enhance knowledge and community pharmacy practice.
- Exercise: Develop 2 goals related to this mission

## Standard 1 Demonstrating Achievement/Impact

### Sample Goals

- To provide pharmacists and pharmacy technicians with up-to-date and scientifically sound health care information and education training.
- How can this be measured?

## Standard 1 Demonstrating Achievement/Impact

### Sample Goals: Let's Take a Closer Look

- The CPE Program goals include:
  - Adopt High-Reliability Organization (HRO) model
  - Develop preceptorship program
  - Develop practice-based activities
  - Provide webinars for approved guidelines and resources across front line staff during convenient hours
  - Maintain and implement new regulatory standards for Antibiotic Stewardship Program (ASP)

## Standard 1 Demonstrating Achievement/Impact

### Sample Goals

- Improve technician sterile compounding skills in compliance with USP 797.
- Advance pharmacist and technician knowledge about pharmacy management as it relates to medication distribution and inventory control

## So we have mission and goals, now what?

- Standard 1: Achievement of Mission and Goals
  - Providers must **establish and implement evaluation plans** that assess achievement and impact of stated mission and goals.
  - The evaluation plan should include measurement indicators or benchmarks
  - They must use this information for continuous development and improvement of the CPE program.



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## Developing an evaluation/assessment plan

- What do your CE Mission Statement and goals say about the expected results of your CE program?
- Do you expect your CE program to produce results in:
  - New or improved abilities (or competence)
  - New or improved performance
  - Improved patient outcomes



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## Linking individual activities to the mission

- How do individual activities contribute towards achievement of the mission?
- What are the intended outcomes of an activity?
  - Knowledge
  - Skills
  - Abilities
  - Competence
- Start with the end in mind

## Backwards Planning

Identify Desired Results

Determine Evidence

Plan Learning Activities

## Evaluation Plan

- Use appropriate data to assess two components:
  - Educational component
    - Individual activities
  - Administrative component
    - Performance of the overall CE program



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## What is an outcome?

- “The result or consequence of a CE event or events”
- Can be expanded to apply to all CE events – so that an outcome is the result or consequence of a CE event or events



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## What are assessments?

- To assess educational outcomes means to look at the results or consequences of the educational event or events
- Assessment tools are used to collect data and information. The tools, and overall assessment strategy, would correspond to the expected “outcome” level

## How do you evaluate?

- Evaluation is the use of data and information to determine the effectiveness of the overall CE program
- Value-based judgements
- Evaluation is a systematic process to determine the worth, value, or meaning of something

## Three Step Process

1. Outcomes: Identify the outcomes
2. Assessments: Develop the strategies and tools to conduct assessments of educational outcomes
3. Evaluation: Link the data collected to evaluate achievement of the outcomes

## Plan ahead

- Have a detailed, descriptive outcomes assessment plan at the earliest stages of activity development
- Develop assessment methods in conjunction with content, not as an afterthought
- Consider the resources you have available to complete the evaluation process (assess, implement, evaluate)



## Consider your educational design

- Content and outcomes measures, will depend on what changes are needed/expected
  - Knowledge/awareness
  - Confidence
  - Competence
  - Performance
  - Patient outcomes
- Use the mission to help guide outcomes strategy
- Be specific about the level for outcomes measurement



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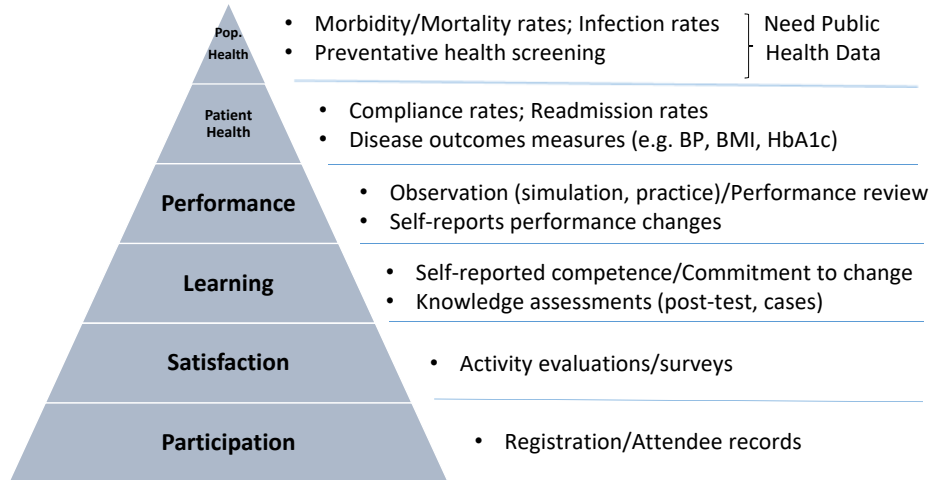
## Outcomes Assessment Models

- **Moore's Outcomes Framework**
  - Moore DE Jr., Green JS, Gallis HA. Achieving Desired Results and Improved Outcomes: Integrating Planning and Assessment Throughout Learning Activities. *J Cont Educ Health Prof.* 2009;29.1:1-15.
- **Kirkpatrick Model**
  - Kirkpatrick, Donald, (1994). *Evaluating Training Programs.* San Francisco, CA: Berrett-Koehler Publishers, Inc.
- **Miller's Pyramid of Assessment**
  - Miller GE. The assessment of clinical skills/competence/performance. *Acad Med* 1990:S63-7.



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## Moore's Outcomes Framework



## Evaluating Outcomes

Learning Levels from Moore's Outcome Framework for Achieving Desired Results	
CE Framework	Description
Level 1 Participation	The number of learners who participated in the CE activity.
Level 2 Satisfaction	The degree to which expectations about the setting and delivery were met.
Level 3/4 Learning	The degree to which participants state what the CE activity intended them to know what/how to do.
Level 5 Performance	The degree to which participants show in an educational setting how to do what the CE activity intended them to be able to do.
Level 6 Patient Health	The degree to which the health status of patients improves due to changes in the practice behavior of participants.
Level 7 Community Health	The degree to which the health status of a community of patients changes due to changes in the practice behavior of participants.

## Moore's Pyramid in Action

Level	Example
Level 1 Participation	100 Pharmacists attend a CPE activity on hypertension
Level 2 Satisfaction	100 Pharmacists attending the activity answer 5 questions on their perspectives of the course content and quality
Level 3/4 Knowledge/ Competence	100 Pharmacists attending the activity answer 10 pre-, and 10 post- questions that are based on course content/objectives
Level 5/6 Performance/ Pt Health	100 Pharmacists attending the activity input data on metrics related to hypertension for 20 chart audited patients pre-, and 20 patients post-activity
Level 6/7 Pt Health/Pop Health	100 Pharmacists attending the activity belong to 3 health systems. Electronic health record data is used to track data on metrics related to hypertension pre- and post-activity



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## The Kirkpatrick Model

### THE KIRKPATRICK MODEL

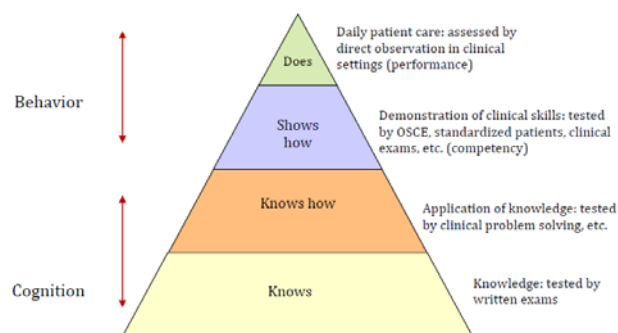


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## Kirkpatrick's Model

- Level 1: Reaction (how participants feel)
  - Were the participants pleased with the activity?
  - Was the activity relevant?
- Level 2: Learning
  - What did the participants learn in the activity?
  - Did the activity increase learner knowledge/competence?
- Level 3: Behavior
  - Did the participants change their behavior?
- Level 4: Results
  - Did the change in behavior positively affect patient care?

## Miller's Pyramid of Assessment



Adapted from: Ramani S, Leinster S, AMEE Guide no 34: Teaching in the clinical environment. Medical Teacher, 2008;30(4):347-364.

## So now what?

- How do these different models assist providers in setting outcomes for CE activities and establishing the evaluation/assessment methods that will be used determine if the outcomes have been achieved?
  - Each activity has its own outcome
  - Collectively the outcomes should support achievement of the mission



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## Standard 1: Achievement of Mission and Goals

- Provider may choose to evaluate the impact of its mission depending on the **activity type**:
  - *Knowledge-based CPE activity*. The levels that may be evaluated are participation, satisfaction, and learning.
  - *Application-based CPE activity*. The levels that may be evaluated are participation, satisfaction, learning, and performance (demonstration during the activity and intended application in practice).
  - *Practice-based CPE activity*. The levels that may be evaluated are participation, satisfaction, learning, performance (demonstration during the activity and application in practice post-activity), and, if applicable, patient and/or population health.



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## CPE Standards: Evaluating Outcomes

### Standard 1: Evaluation of Achievement and Impact of CPE Mission and Goals



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## Outcomes Models

Moore's Framework	Kirkpatrick	Miller's Framework	Sources of data
Level 1 Participation			Attendance Records
Level 2 Satisfaction	Reaction		Activity Evaluations
Level 3A/3B Learning	Learning	Knows/ Knows how	Pre/Post Tests
Level 4 Competence	Behavior	Shows how	Observation Self-reported
Level 5 Performance	Behavior	Does	Observed Self-reported
Level 6 Patient Outcomes	Results		Patient data Quality indicators



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## Examples of Evaluation Data

Survey Item	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
I was satisfied with the course	5	4	3	2	1
I would rate the activity overall as	5	4	3	2	1
This course was relevant to my job responsibilities	5	4	3	2	1
This course improved my knowledge about the subject	5	4	3	2	1
I plan to apply the knowledge I gained	5	4	3	2	1



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## Examples of Evaluation Data

Objective	Knowledge Before					Knowledge After				
Review the basics of dry eye	1	2	3	4	5	1	2	3	4	5
Identify agents used in the management of dry eye	1	2	3	4	5	1	2	3	4	5
Determine when to refer patients for management of dry eye	1	2	3	4	5	1	2	3	4	5



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## Example of Evaluation Data

- Pre/Post Test Performance

The thiazide/thiazide-like diuretic with the shortest half life is:

1. Hydrochlorothiazide
2. Indapamide
3. Chlorothalidone
4. Metolazone
5. They all have the same half-life



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## Example of Evaluation Data

- Pre/Post Test Performance

A 52-year old African American man presents to your clinic. His average blood pressure is 137/79 mm Hg and heart rate is 71 bpm over the last 2 visits. He has no other relevant medical history other than smoking. His TC is 220 mg/dl with an HDL of 35 mg/dl. Which of the following treatment plans is optimal to recommend for this patient?

1. Lifestyle modifications only
2. Lifestyle modifications plus chlorthalidone
3. Lifestyle modifications plus HCTZ and Lisinopril
4. Lifestyle modifications plus metoprolol



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## Example of Evaluation Data

Intentions towards practice change

As a result of participation in this session I will change practice:

\_\_\_ yes \_\_\_ no \_\_\_ uncertain

If yes, please specify one change you will make: \_\_\_\_\_

What is your level of commitment to this change: 1 2 3 4 5

If uncertain, please describe what causes the uncertainty: \_\_\_\_\_

If no, please specify why you will not make any change: \_\_\_\_\_



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## Example of Evaluation Data

	Skill Before Activity					Skill After Activity				
Identify patients with hypertension	1	2	3	4	5	1	2	3	4	5
Develop treatment plan for patients with hypertension	1	2	3	4	5	1	2	3	4	5
Counsel patients on anti-hypertensive medications	1	2	3	4	5	1	2	3	4	5
Monitor patients with hypertension	1	2	3	4	5	1	2	3	4	5



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## Standard 1: Achievement of Mission and Goals

- The provider should demonstrate evidence to **indicate the degree to which the mission and goal(s) of the CPE program are met.**
  - Establish Outcomes
  - Implement Assessment Plan
  - Evaluate Achievement



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## Let's look back at the mission

- If the mission is to produce changes in performance but the provider doesn't offer CE activities designed to change performance, how could your ultimate destination ever be reached?
- Need to keep the mission in mind when developing CE activities.



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## Exercise – Sample Mission

Plan, develop, implement, and evaluate continuing pharmacy education (CPE) activities that are free from commercial bias, evidence-based, and enhance the knowledge and skills of pharmacists

What kind of outcomes data could be collected to assess achievement?

## Exercise – Sample Mission

To provide a coordinated program of evidence-based continuing education activities for staff to enhance their ability to provide patient care and improve patient outcomes

What kind of outcomes data could be collected to assess achievement?

## Standard 1: Evaluating the Impact

Consider establishing benchmarks/metrics (examples):

- Increase attendance by 5% annually
- Increase patient safety CPE activities (-05) by 15%
- Application-based activities should comprise  $\geq 40\%$  of CPE activities
- $\geq 95\%$  of learners indicate no bias on evaluations

Were benchmarks achieved? Why/Why Not?

Trends?

What changes were made in the CPE program?



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## Standard 1: Evaluating Achievement/Impact

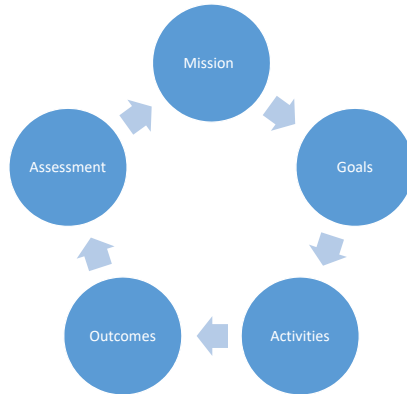
Self-Assessment Questions to be considered (examples):

- Has the CPE Program achieved what it set out to do?
  - What was done well?
  - What could have been done better?
- If mission/goals not achieved, why not?
  - What was learned from evaluation process?
  - What stage(s) were lacking/deficient (e.g. planning, delivery, evaluation)?
- How should mission/goals be revised based on analysis?
- What barriers might exist in making adjustments?



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## Big Picture



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# Questions?



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