CE Educator's Toolkit:
Worksheet Guide

Evidence-based design and implementation strategies for effective continuing education

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Introduction to worksheet guide

SECTION ONE

The following worksheet guide aims to complement the CE Educator's Toolkit by providing the worksheets in an easy-to-access format. The worksheets and templates included in this guide are assistive resources to help continuing education (CE) leaders through the planning and development phases of their educational sessions.
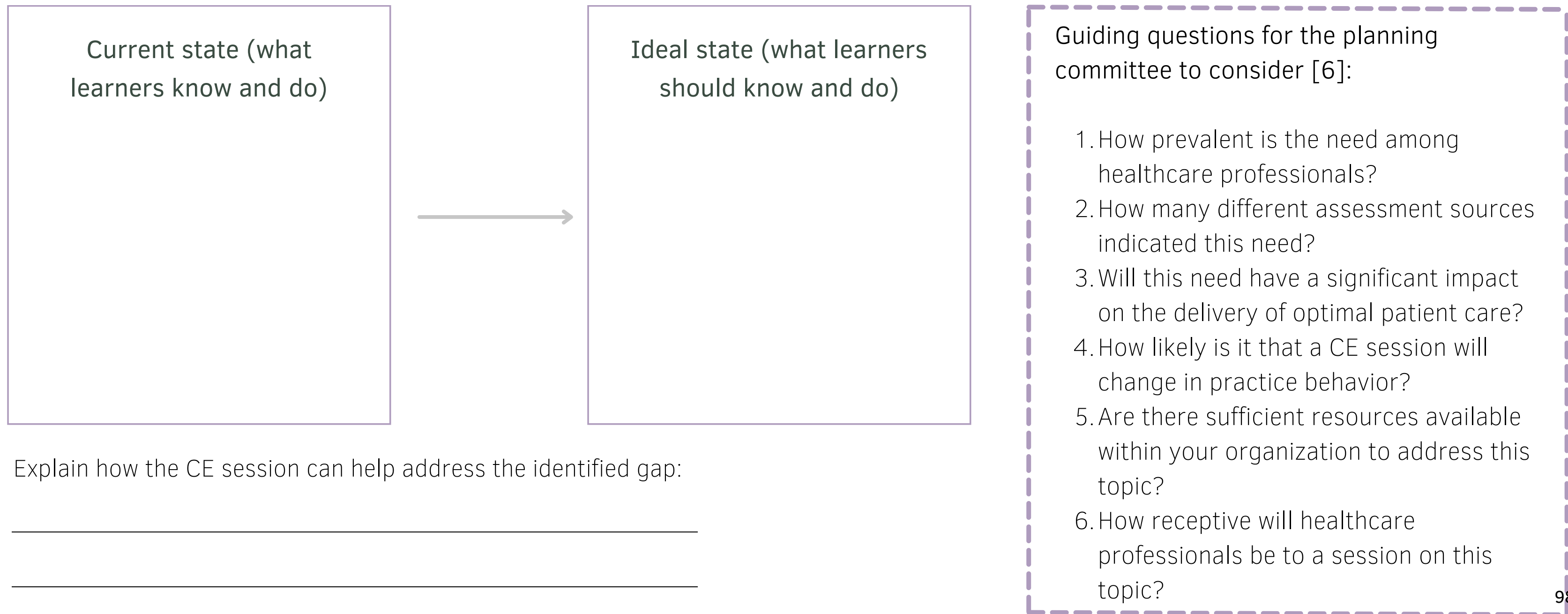
How to begin planning your CE session

SECTION TWO
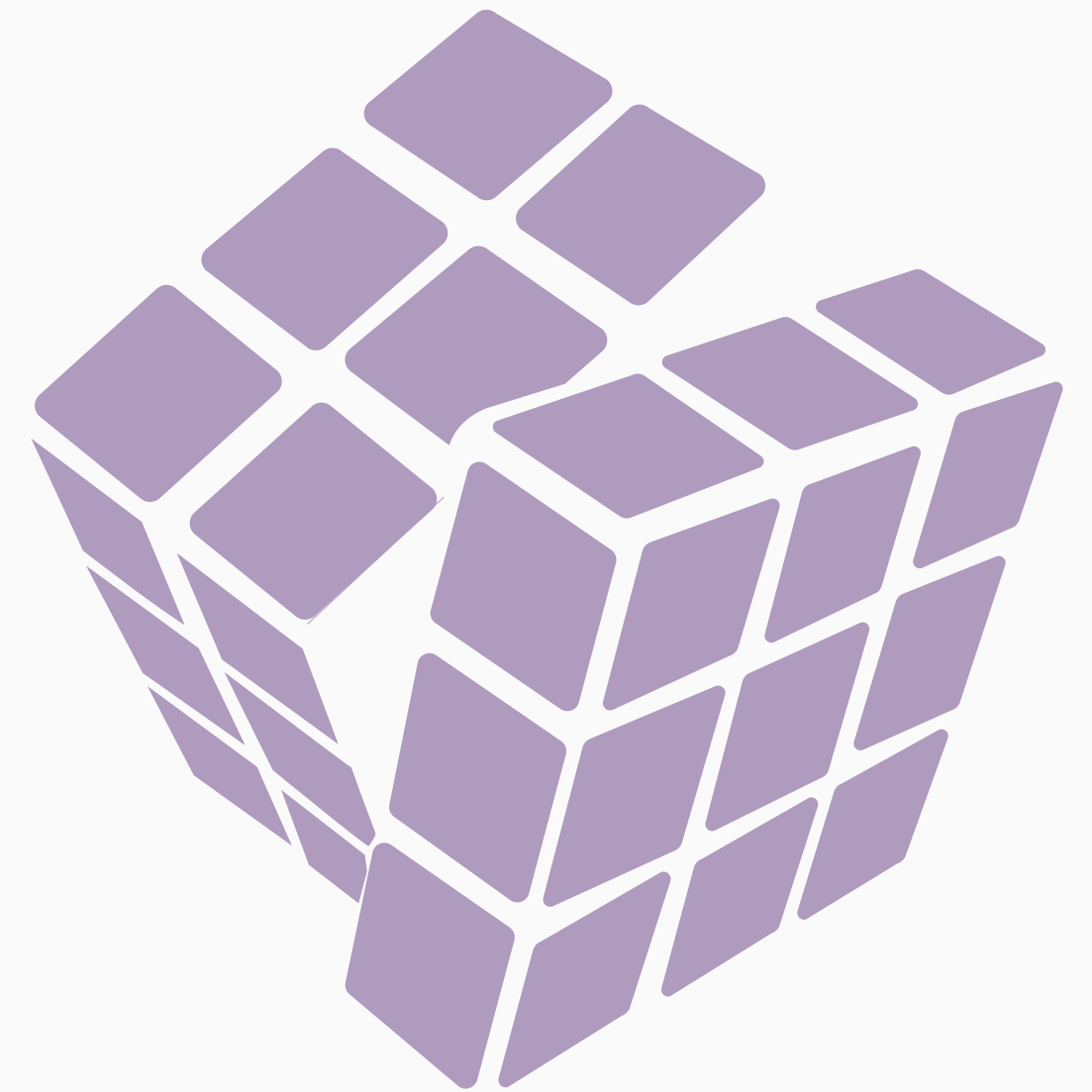
Practice: Identify the gap

Needs assessments help define the gap between current and desired education practices for your target audience [4-5]. Identification and analysis of educational needs can provide the foundation for developing educational objectives. In this exercise, identify the educational or professional practice gap that the CE session will address.

Current state (what learners know and do)

Ideal state (what learners should know and do)

Explain how the CE session can help address the identified gap:

_____

_____

Guiding questions for the planning committee to consider [6]:

1. How prevalent is the need among healthcare professionals?
2. How many different assessment sources indicated this need?
3. Will this need have a significant impact on the delivery of optimal patient care?
4. How likely is it that a CE session will change in practice behavior?
5. Are there sufficient resources available within your organization to address this topic?
6. How receptive will healthcare professionals be to a session on this topic?

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How to write a learning objective

Learning objectives should reflect the desired knowledge, skills, and abilities that learners should develop as a result of participating in your CE session. Bloom's Taxonomy describes the types of knowledge and cognitive processes used by learners. When writing a learning objective, first establish which type of knowledge (left side of the table on page 33 in the CE Educator's Toolkit) you wish your learner to acquire. Using this type of knowledge, next determine which cognitive process (top of the table) you wish to focus on in your instruction. Bloom's Taxonomy increases in rigor from left to right [17a]. Learning objectives should be written using action verbs that target the desired combination of knowledge and cognitive process to make it clear to learners what changes they should expect upon completion of the CE activity [17]. Framing learning objectives in this way has the added benefit of providing objective measurable indicators of behavior that can support the demonstration of learner change. Use the following table to create targeted learning objectives. The examples provided are not exhaustive but provide a starting point for developing your learning objectives.

Bloom's Taxonomy has continuously evolved to meet the changing needs of educators. As you become more familiar with learning objectives, you may wish to explore the different versions. Please see page 35 in the CE Educator's Toolkit for additional resources.

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Adapted from: (Adams, 2015)

The Taxonomy Table [17a]

| The Knowledge Dimension	The Procedural Dimension					
	Remember	Understand	Apply	Analyze	Evaluate	Create
Factual Knowledge	The learner will list symptoms of juvenile diabetes	The learner will summarize the functions and features of a new medical device	The learner will complete a surgical safety checklist	The learner will be able to differentiate the clinical presentations of acute rhinosinusitis vs acute bacterial rhinosinusitis to develop treatment plans	The learner will rank risk factors in terms of severity for COVID-19	The learner will create a personal quick guide for identifying patients with a higher risk for stroke
Conceptual Knowledge	The learner will recall the differences between Crohn's Disease and Ulcerative Colitis	The learner will explain why they would recommend a particular anti-depressant drug for a patient	The learner will apply the four pillars of medical ethics to a patient situation	The learner will distinguish which patients to prioritize in a triage situation	The learner will critique the effectiveness of different managerial styles	The learner will design a treatment plan for a person living with cancer
Procedural Knowledge	The learner will list the key factors in effective team management	The learner will explain how to complete a successful kidney transplant	The learner will perform a tracheal intubation	The learner will attribute a successful surgical operation to the specific methods used	The learner will check their implementation of a vascular stent	The learner will create step by step plan onboarding new team members

INITIAL PLANNING

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Adapted from: (Anderson, L. W., & Krathwohl, D. R, 2001)   6

Practice: Write a learning objective

TACT Principle	Learning Objective
TARGET Whom is the learning objective targeted toward?	
ACTION What is the behavior or attitude change required?	
CONTEXT Where is the behavior or attitude change taking place?	
TIME What is the time frame to demonstrate behavior or attitude change?	

Write your learning objective based on the TACT principles.

_____

_____

_____

_____

Educational interventions for CE sessions

SECTION THREE
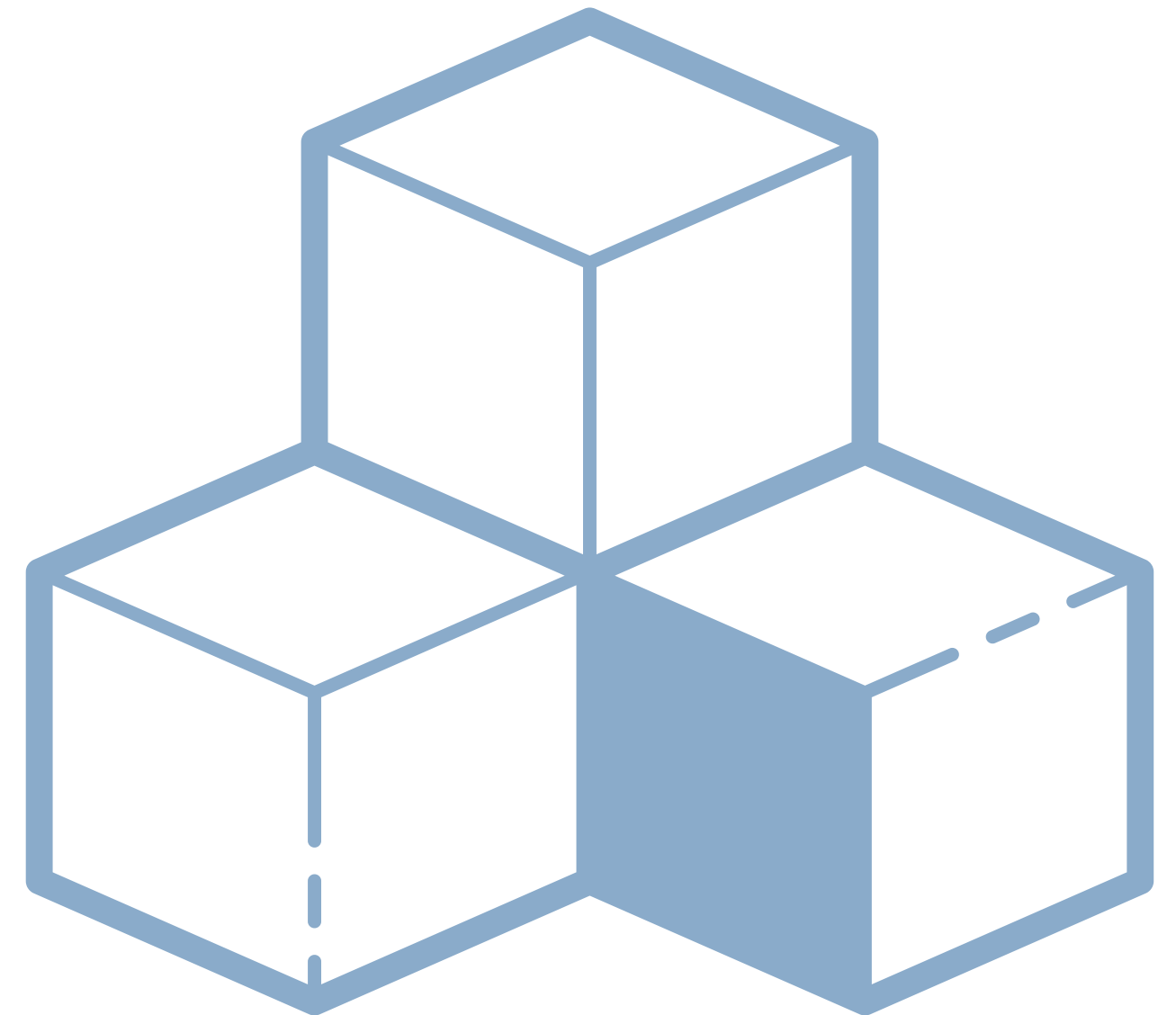
Facilitation of small group learning

INTERVENTION ONE

Small group learning: an instructional approach that encompasses active participation, purposeful activities, and face-to-face interaction. It is a concerted and collaborative effort in learning new knowledge and skills, and attaining a mutual objective.

Practice: Create a mind map

Mind maps can be a useful tool in planning out your session's discussion and identifying key concepts that you want learners to take away from the CE session. Use the following template to create a mind map for your CE session.

Topic of CE activity
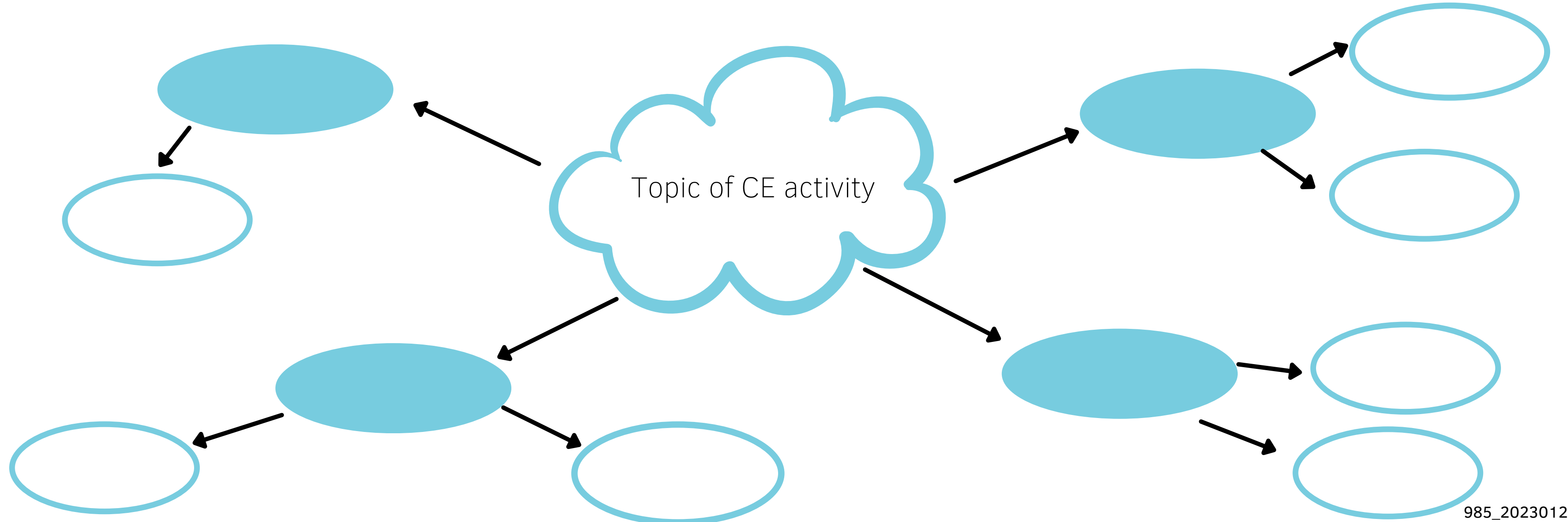
Sample: Planning canvas for facilitators

What techniques and activities will you use to encourage discussion?

How will you work through conflicts that arise in groups?

What challenges do you anticipate and how will you mitigate them?

How will you support groups through Tuckman's stages of group development?

What strategies can you use to create an inclusive, safe and supportive space for the learners?

What group size will you choose?

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Case-based learning

INTERVENTION TWO

Case-based learning: an educational intervention that describes when learners learn by solving real world problems.
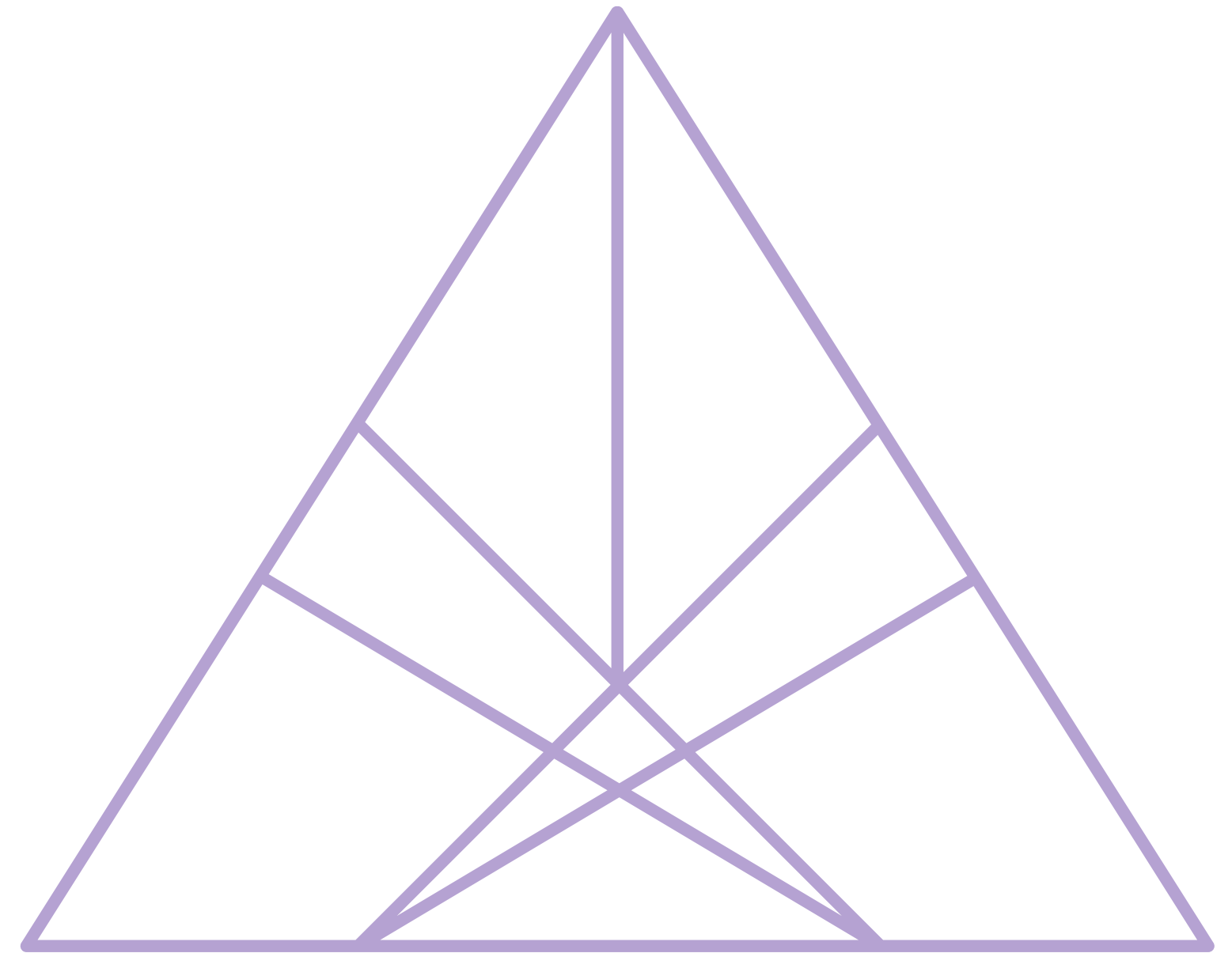
Sample: Planning canvas

Who would you engage to develop the case?

When would you present the case?

How would you work through the case?

How would you debrief the case?

How would you present the case (before, during or after the session)?

What delivery approach would you select?

Reflective learning

INTERVENTION THREE

Reflective learning: a type of learning where learners critically reflect upon their own thoughts, behaviors and actions in practice scenarios.

Sample: Reflective practice

Topic you are reflecting on:

How would you describe this event (describe your feelings)?

1 **What happened**

Question 1: Provide a brief description of the situation. How did you respond? How did you feel during and after the event?

2 **Looking back**

Question 2: Do you think you have achieved your learning goals? Why or why not? Are you satisfied with how you handled the situation?

3 **Looking forward**

Question 3: What lessons did you learn from this scenario? What is one thing you want to remember or change from this activity? What do you plan to do differently now?

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Sample: Personal action plan

1. What changes do you want to make as a result of attending this CE session? Aim to define at least two specific and measurable changes.

   _____

   _____

2. How important is it for you to achieve your stated learning objectives for this session on a scale from 1-5? (1=least important, 5=most important)

   1 2 3 4 5

3. How confident are you that you can achieve your goal(s) on a scale from 1-5? (1=least confident, 5=most confident)

   1 2 3 4 5

4. Define a timeline for your strategy. When do you plan to start, assess, and finish the process?

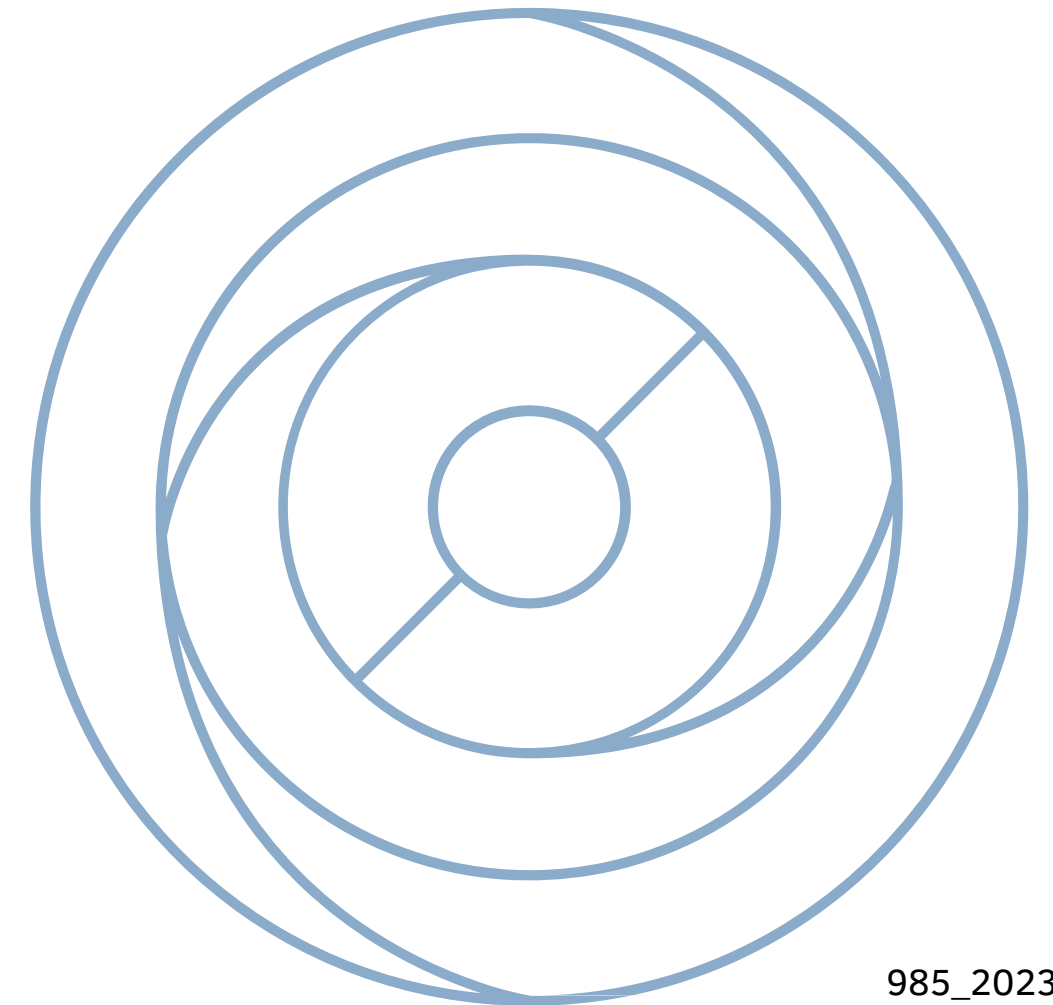   Start Date:
   Assess Date:
   Finish Date:

5. How will you know that you have reached your goal? What and how will you measure it?

   _____

   _____

6. What barriers will you encounter? What strategies could you employ to address them?

   _____

   _____

7. What resources do you have or need to achieve your goal?

   _____

   _____

Quick guide to assessing and evaluating CE interventions

SECTION FOUR

Practice: Create your own logic model

Goal: _____

STAKEHOLDERS	INPUTS	ACTIVITIES	OUTPUTS	OUTCOMES			ASSUMPTIONS
				SHORT	MEDIUM	LONG	

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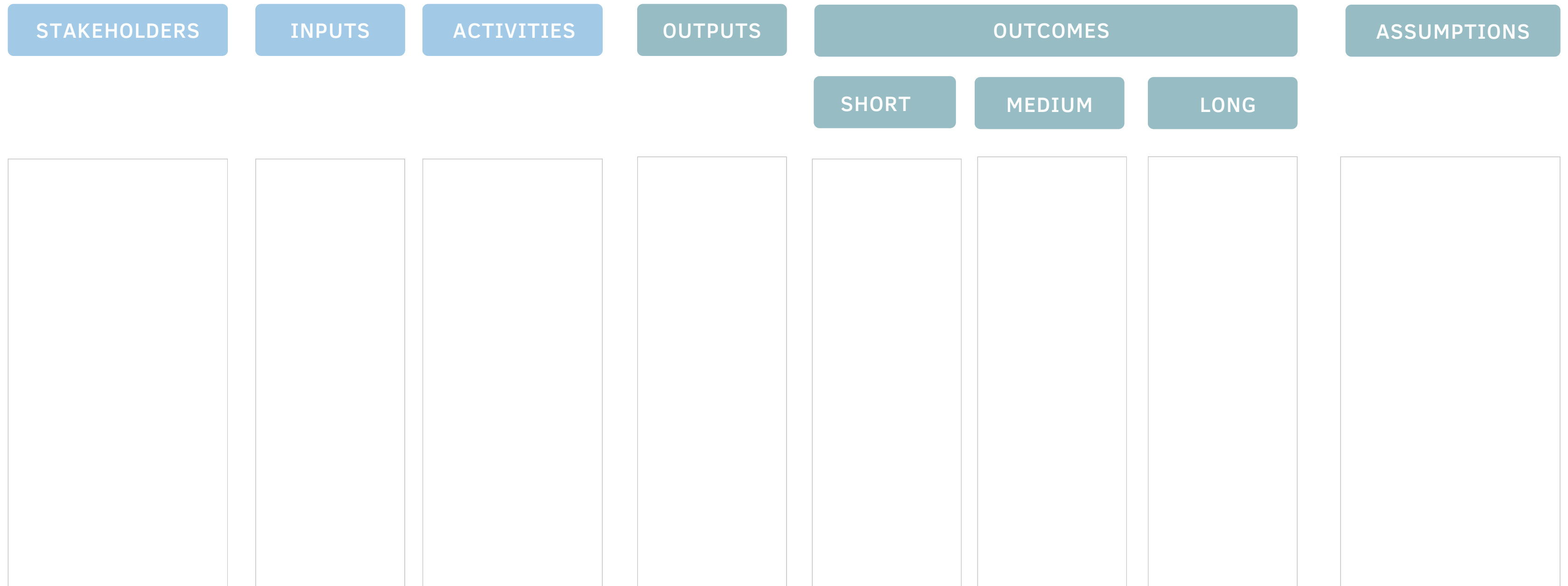
Practice: CE planning worksheet

Use this worksheet to start planning out the structure, content, and evaluation components of your CE session.

Needs and gaps:

_____

_____

Learning activities/ teaching modalities:

_____

_____

Outcome methods (how you are going to evaluate):

_____

_____

Activity learning objectives:

_____

_____

Theoretical basis:

_____

_____

Time frame (when you will collect data):

_____

_____

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Sample: Post-evaluation survey

1. What did you learn or how will this session impact your practice?

_____

_____

2. What competency areas were improved as a result of the CE session (e.g., patient care, clinical knowledge, systems-based practice)?

_____

_____

3. Identify three professional or practice gaps that you would like addressed in a future CE session.

_____

_____

4. What changes will you make in your practice as a result of this session?

_____

_____

5. What did you find most effective about this session?

_____

_____

6. Thank you for providing feedback. We would love to hear more if you have any additional comments to share related to your learning experience.

_____

_____

Sample: Interview guide

Practice Context

1. Please describe your current professional setting.
   Prompt: where you work
   Prompt: length of time in current role

Effectiveness

2. Tell us about your overall learning experience and to what extent it met or didn't meet your expectations or needs?

3. Do you feel as though your participation in this session contributed to your professional development?

4. What were the elements in the CE session that helped to make it a meaningful learning experience for you?
   Prompt: Lectures, discussions, case studies, etc.
   Prompt: Positive or negative experience

Implementation

5. What are your thoughts on the facilitation skills and knowledge of the facilitators?

Reach

6. How equitable was the CE session, meaning to what extent did you feel the session:
   Prompt: Accounted for different geographic locations, ability, access to technology, resources, work schedule, and other learner factors?
   Prompt: Provided regular check-ins?
   Prompt: Provided timely and useful feedback?

Maintenance

7. If you were teaching this session, what would you keep? What would you change?

8. What are your final suggestions or thoughts about your learning experience?

That concludes our interview. Thank you for participating and helping us to improve our CE session. Do you have any questions?

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Download the toolkit at www.accme.org/ceeducatorstoolkit

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