

Best Practices for Writing and Editing Needs Assessments

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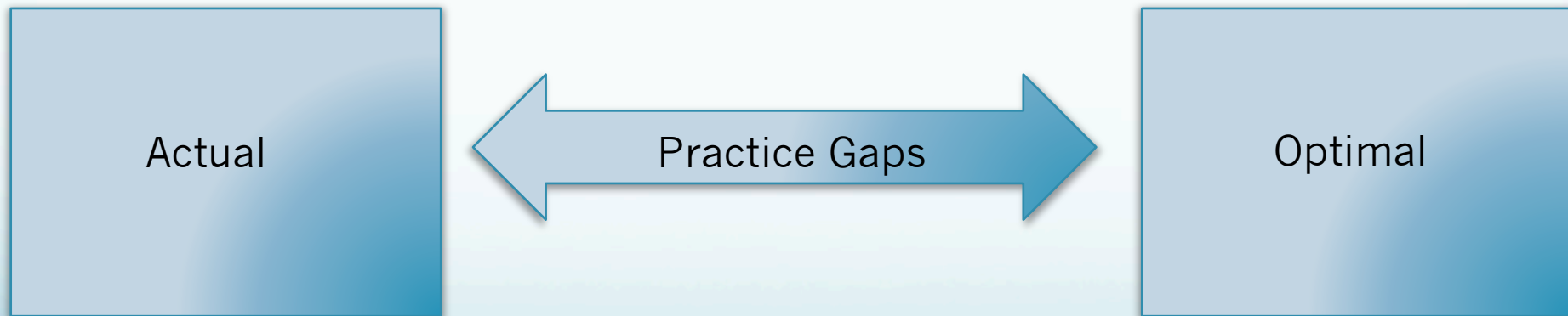
Learning Objectives

Upon completion, participants will be able to:

1. Write a needs assessment that reflects current best practices, as determined by a survey of more than 100 respondents working in the field of accredited CME.
2. Discuss the relative importance of the medical literature review, clinical practice guidelines, and key opinion leader (KOL) interviews within today's CME needs assessments.
3. Enrich future needs assessments with new sources of information, new forms of presentation, or both.

What is a Needs Assessment?

A decision-making tool used by continuing educators when planning activities to offer. *Needs* can be described as discrepancies, or gaps, between an actual condition and a desired standard.¹ Sometimes called a gap analysis.



1. Queeney D. *Assessing Needs in Continuing Education*. San Francisco, CA: Jossey-Bass; 1995.

Freelance Opportunities

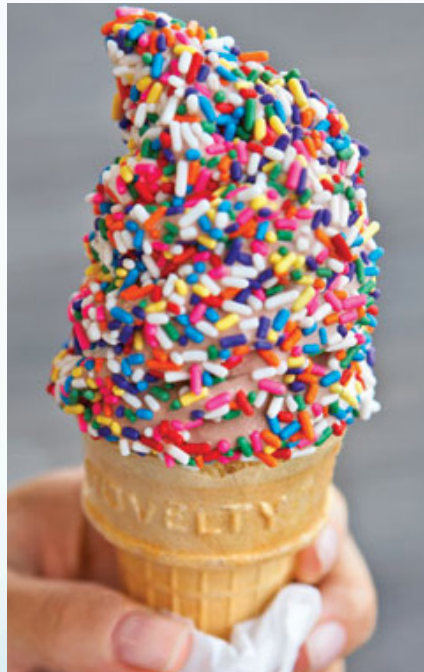
- Oncology gold rush
- Breakthroughs becoming common
- Fast and frequent FDA approvals



Evidence-Based Recipes for NAs*



Standard



Better



Deluxe

*Recipes are cumulative: better includes standard, and deluxe includes better.

Standard NA

Ingredients:

1. Medical literature review
2. Evaluation reports from participants in previous activities
3. Reference to clinical practice guidelines
4. KOL interview(s) regarding practitioner-level gaps
5. Basic epidemiology of disease state
6. Clear statement of practice gaps
7. Chart showing alignment of practice gaps, learning objectives, and desired outcomes. May also show educational needs.



Better NA

Added ingredients:

8. Survey of practice patterns among clinicians
9. Chart(s) showing outcomes data **

** Some practitioners consider these to be part of a standard NA.



Deluxe NA

Added ingredients :

10. Reference(s) to national health care quality standards **
11. Interview with a patient or patient advocacy group regarding patient-level gaps
12. Patient chart audits including performance improvement (PI) data

** Some practitioners consider these to be part of a standard NA.



Study Background

- Variability noted in pilot study of needs assessments written for various clients
- Editor of *Journal of Continuing Education in the Health Professions* (JCEHP) suggested an article
- Simple research study planned

Project Overview

- Data gathering phase, 2014
 1. Survey Monkey survey
 2. Google Hangout
 3. Focus Group

- Dissemination phase, 2015
 1. Live workshop for Alliance members
 2. Online training for American Medical Writers Association (AMWA) members
 3. Live presentation at AMWA-DVC freelance workshop
 4. Research abstract for JCEHP
 5. Poster and presentation at AMWA in 2015 (?)

Study Limitations

- Not a random sample of writers
 - Biased toward members of investigators' professional networks (LinkedIn, Twitter, BELS, AMWA, etc.)
 - Dinner focus group respondents biased toward residents of Philadelphia area
 - Google Hangout biased toward tech-savvy writers
- No way to break out NAs written for commercial support versus NAs written for other purposes (e.g. academic, hospital, or government work)

Qualitative Methods

- Google hangout in October, N=2
- Dinner/focus group in November, N=3
- Qualitative results available on request
- From Don@hartingcom.com

Google Hangout & Dinner Meeting

- 5 participants
- Oct and Nov 2014
- Screened for writers of CME needs assessments
- 7 questions
- Qualitative data (depth and perspective)
- Summary and transcript from dinner meeting available at: <http://dvmw.blogspot.com/> also <http://goo.gl/8MCsrf>

Issues Discussed:

- Importance/definition
 - Medical literature review
 - Clinical practice guidelines
 - Interviews with KOLs
 - Who actually *reads* your NAs?
 - Grants committee members
 - Other readers along the way?
- Trends
 - Any differences from 5 years ago
 - Predictions for the future

Results

- Medical literature review
 - Shorter, *less* comprehensive, *more* selective
 - Focuses on identifying practice gaps
- Clinical practice guidelines
 - Add credibility
 - Help distill gaps
 - Describe changes in therapeutic landscape
 - However: evidence base may be weak
- Interviews with KOLs
 - Some writers never use these
 - KOL survey is preferable

Results, cont'd

- Trends
 - Use of outcomes data is now common, will continue
 - Sources of data will continue to multiply, new forms of citations (eg. digital references) needed
 - Multimedia references, either in text or in endnotes
 - Patient's voice becoming more important
 - Patient interviews
 - Patient stories
 - Patient advocacy groups

Value of Needs Assessments

Essential tool for quality improvement¹

- Used in program planning²
- Basis for developing learning objectives
- Justify agenda and content
- Used for ACCME-accredited programs³

1. Queeney D. *Assessing Needs in Continuing Education*. San Francisco, CA: Jossey-Bass; 1995

2. Moore D. *J Contin Educ Health Prof*. 1998;18:133-141.

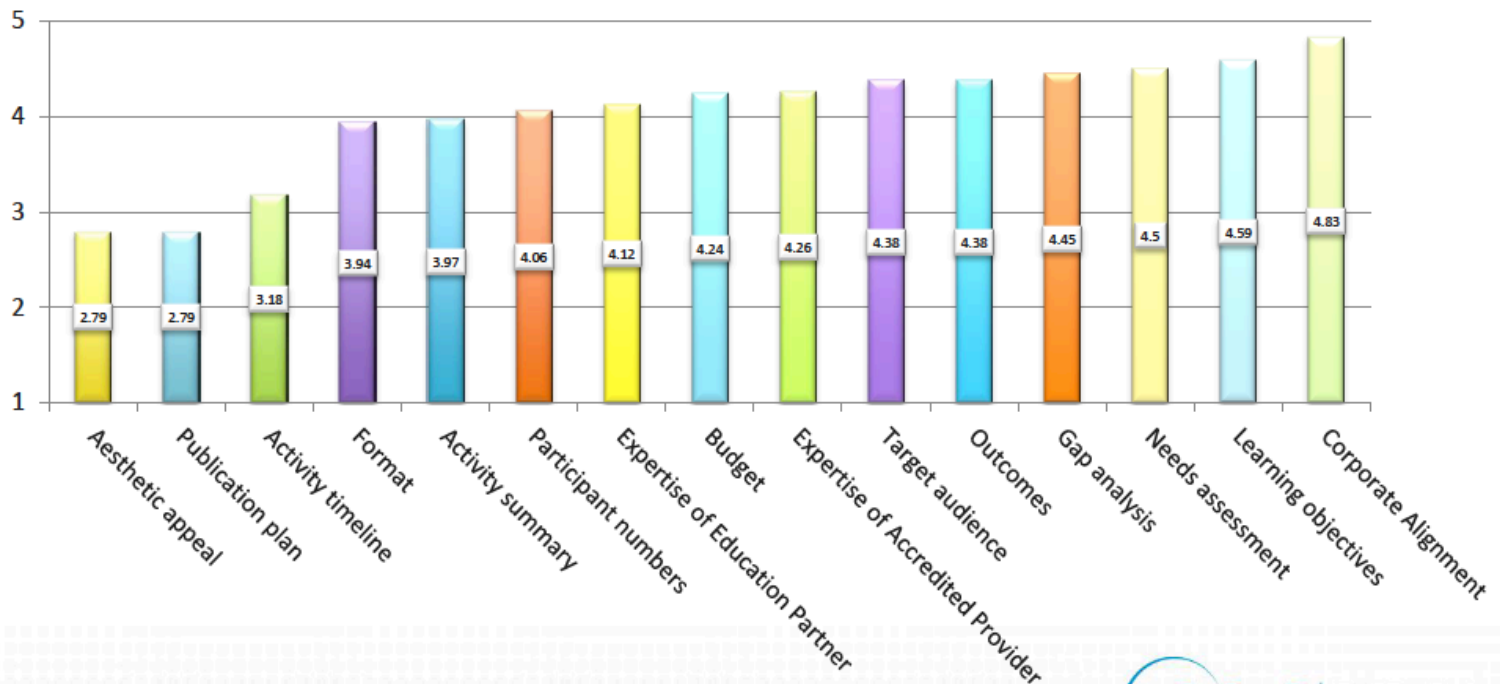
3. ACCME Accreditation Criteria. Criterion 2. Available at:

[http://www.accme.org/sites/default/files/](http://www.accme.org/sites/default/files/626_20140626_Accreditation_Requirements_Document.pdf)

[626_20140626_Accreditation_Requirements_Document.pdf](http://www.accme.org/sites/default/files/626_20140626_Accreditation_Requirements_Document.pdf). Accessed November 18, 2014.

Value, cont'd

What value do you place on the following components typically included in a grant proposal?



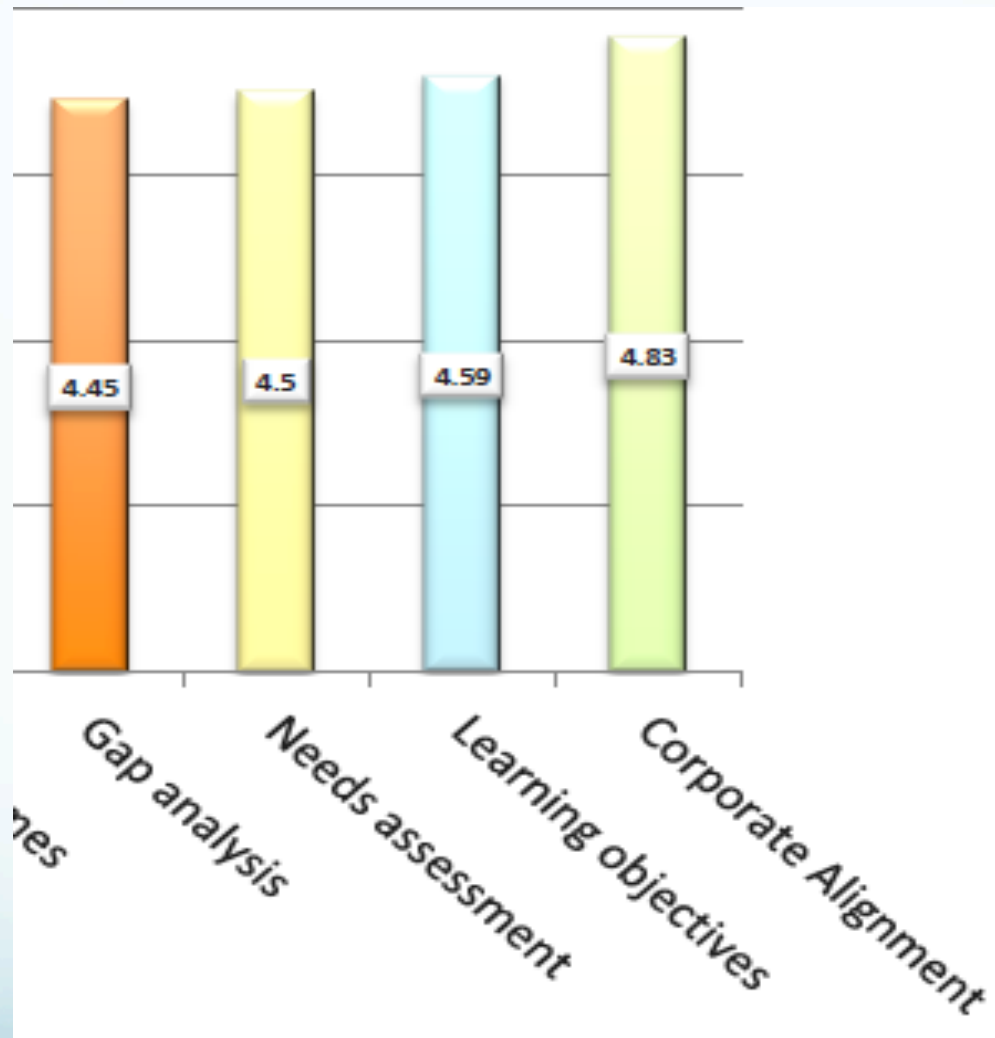
(1-Least Value; 5- Most Value)



Source: Quality Grants Survey, Global Education Group, 2014

#AMWA-CME

Value, cont'd.

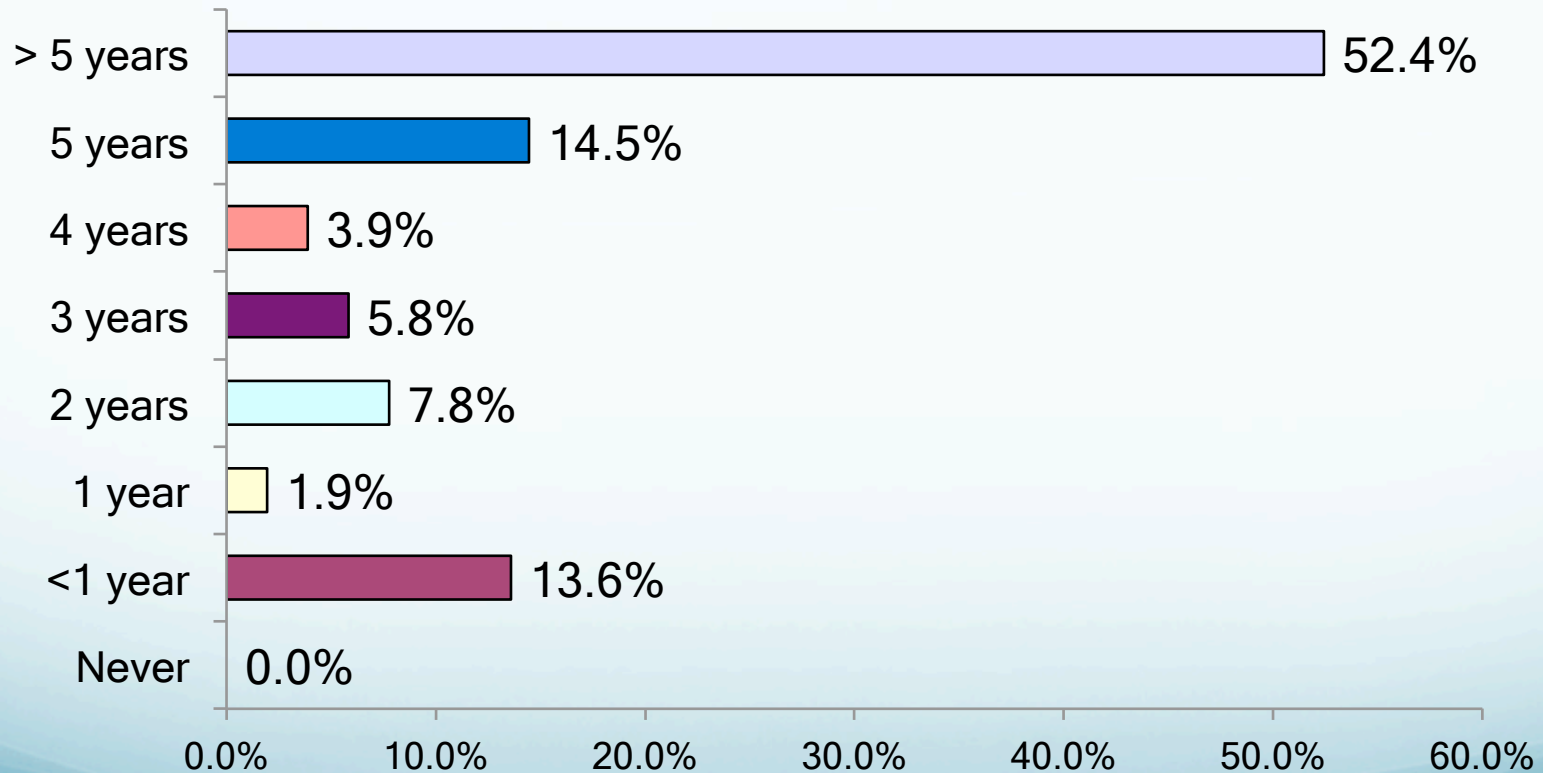


Source: Quality Grants Survey, Global Education Group, 2014

Quantitative Methods

- Survey Monkey Survey
 - Open September 3 to 19 2014
 - 10 questions
- Promoted to investigators' professional networks via
 - LinkedIn (Alliance and AMWA groups)
 - Twitter (followers of @CME_Scout, @BELS_Editors, and @RuwaidaVakil)
 - Announcement in AMWA monthly member email and in AMWA online forums
 - Announcement by Alliance email
 - N=110 responses, 6 responses from people who never wrote an NA (filtered out), 1 person had no responses therefore N=103

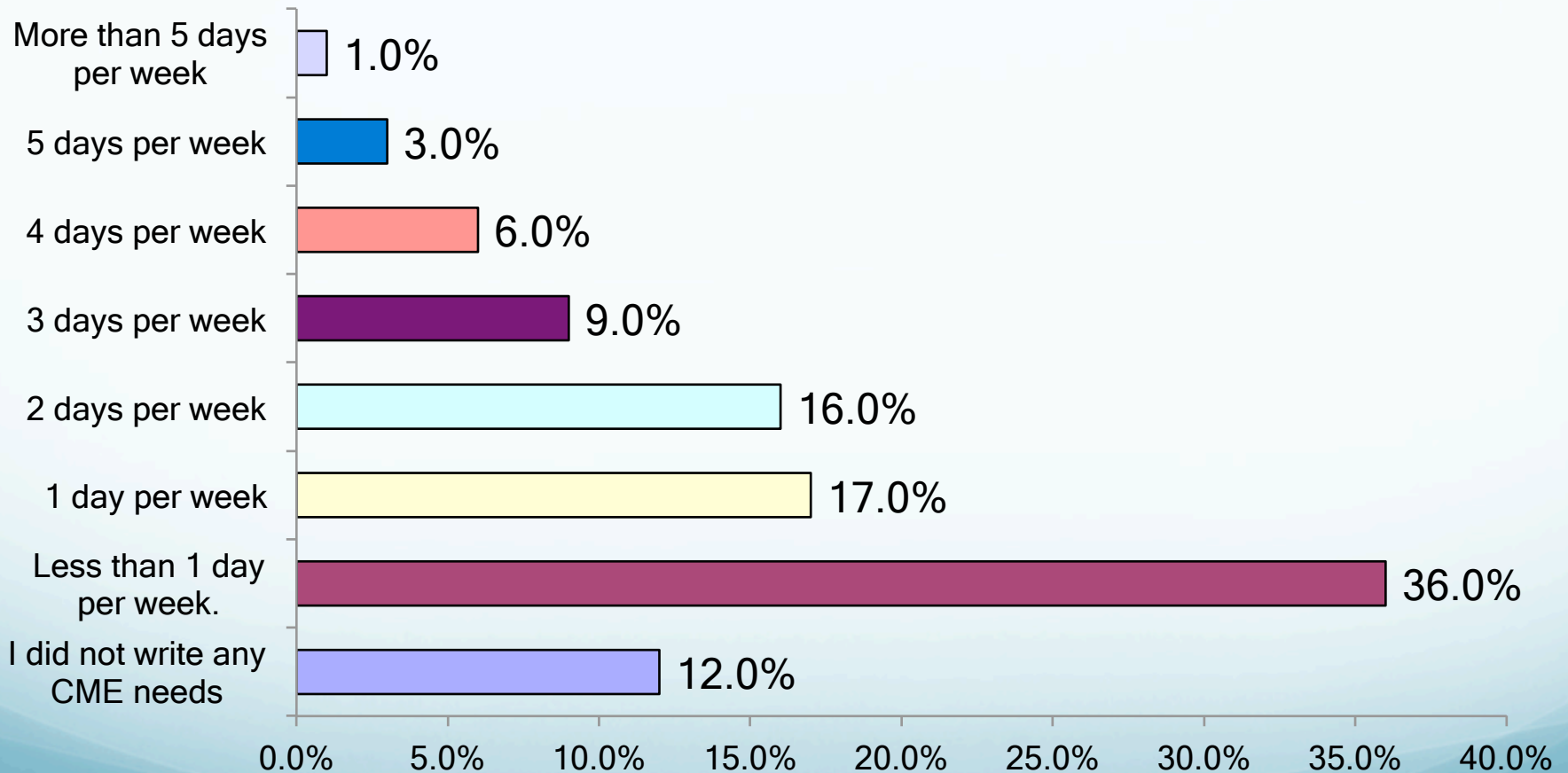
Q1: How long has it been since you wrote your first CME needs assessment?



• Answered: 103 Skipped: 1

#AMWA-CME

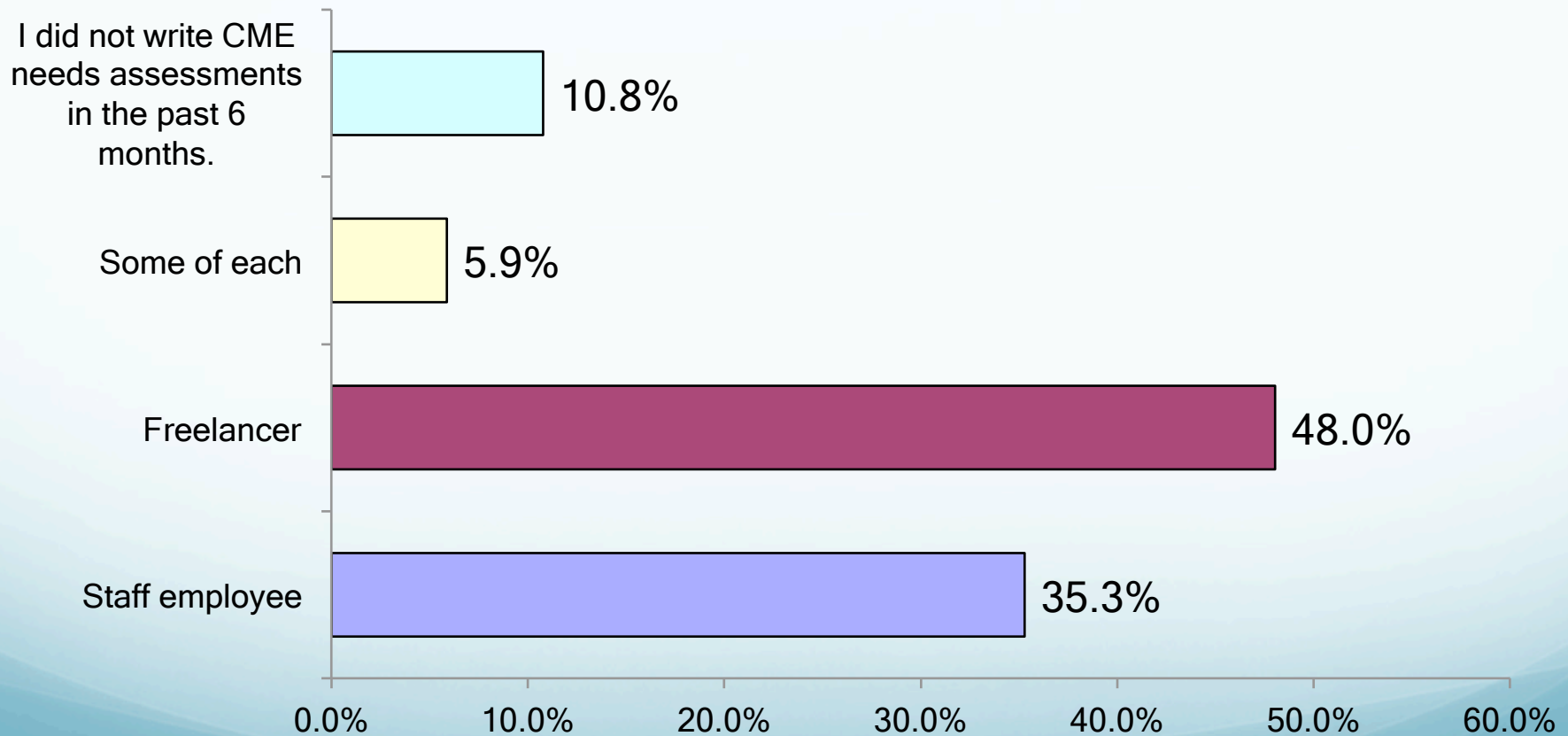
Q2: Over the past 6 months, roughly how many days per week did you spend writing CME needs assessments?



• Answered: 100 Skipped: 4

#AMWA-CME

Q3: In the past 6 months, did you write CME needs assessments as a staff employee or as a freelancer?

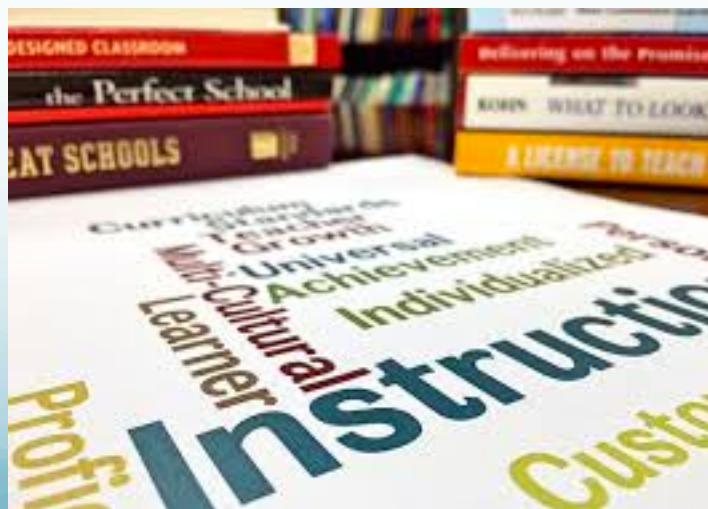


• Answered: 102 Skipped: 2

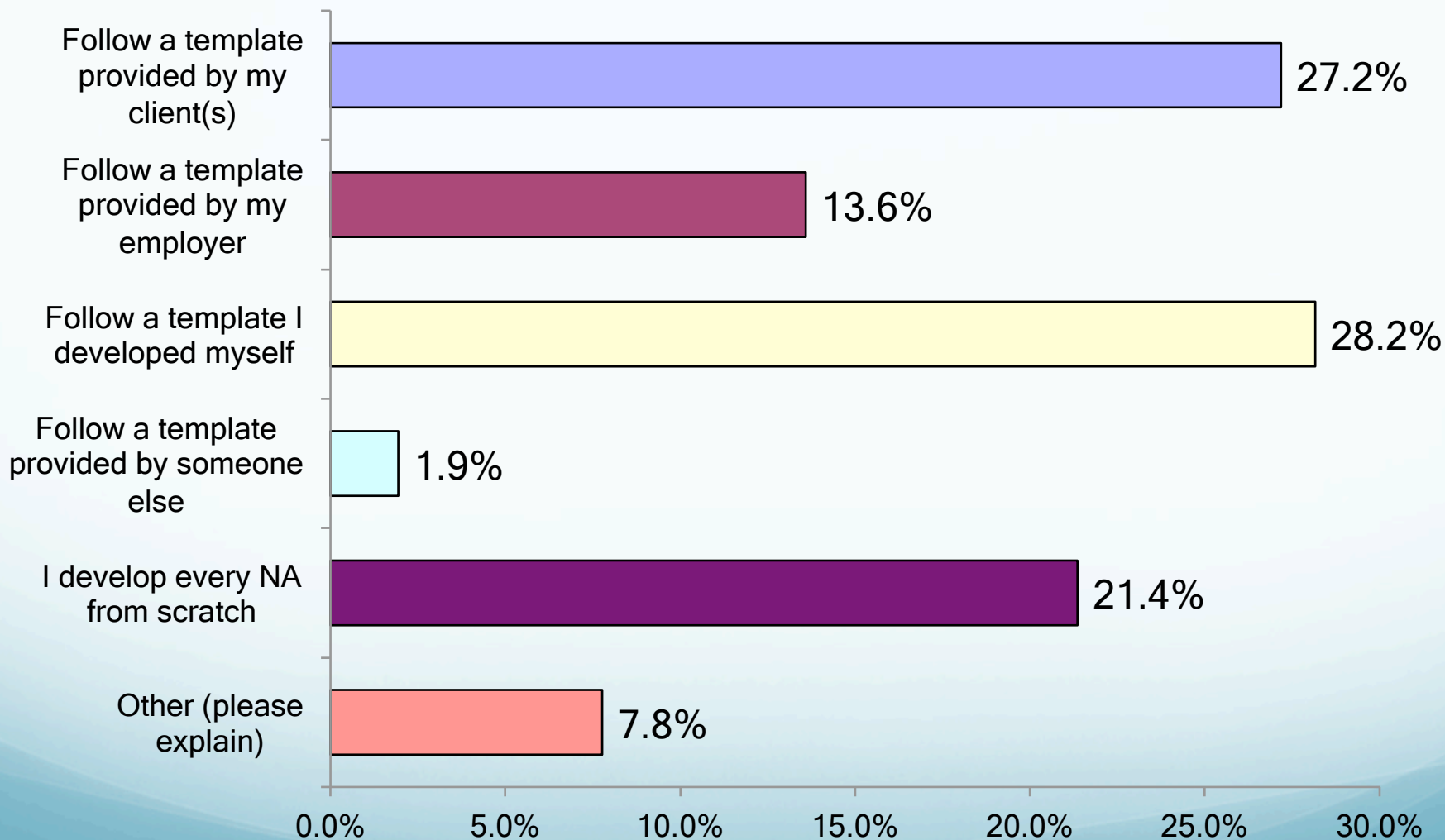
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Potential Clients

- Medical Education Companies
- Physician Professional Societies
- Others- non-profit foundations, academic institutions, hospitals, malpractice insurance companies and anyone that produces CME



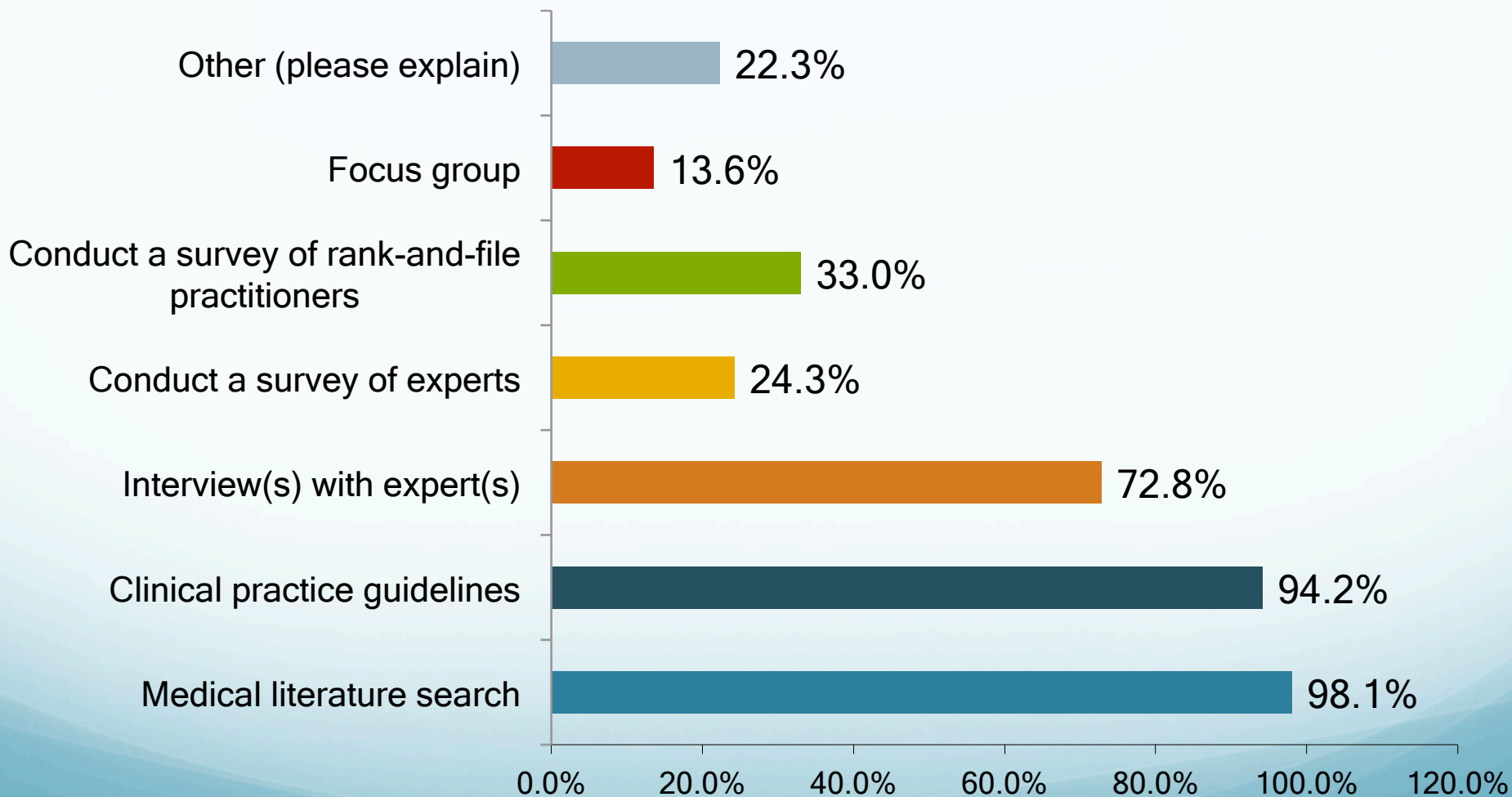
Q4: Which one of the following best describes how you write needs assessments?



• Answered: 103 Skipped: 1

#AMWA-CME

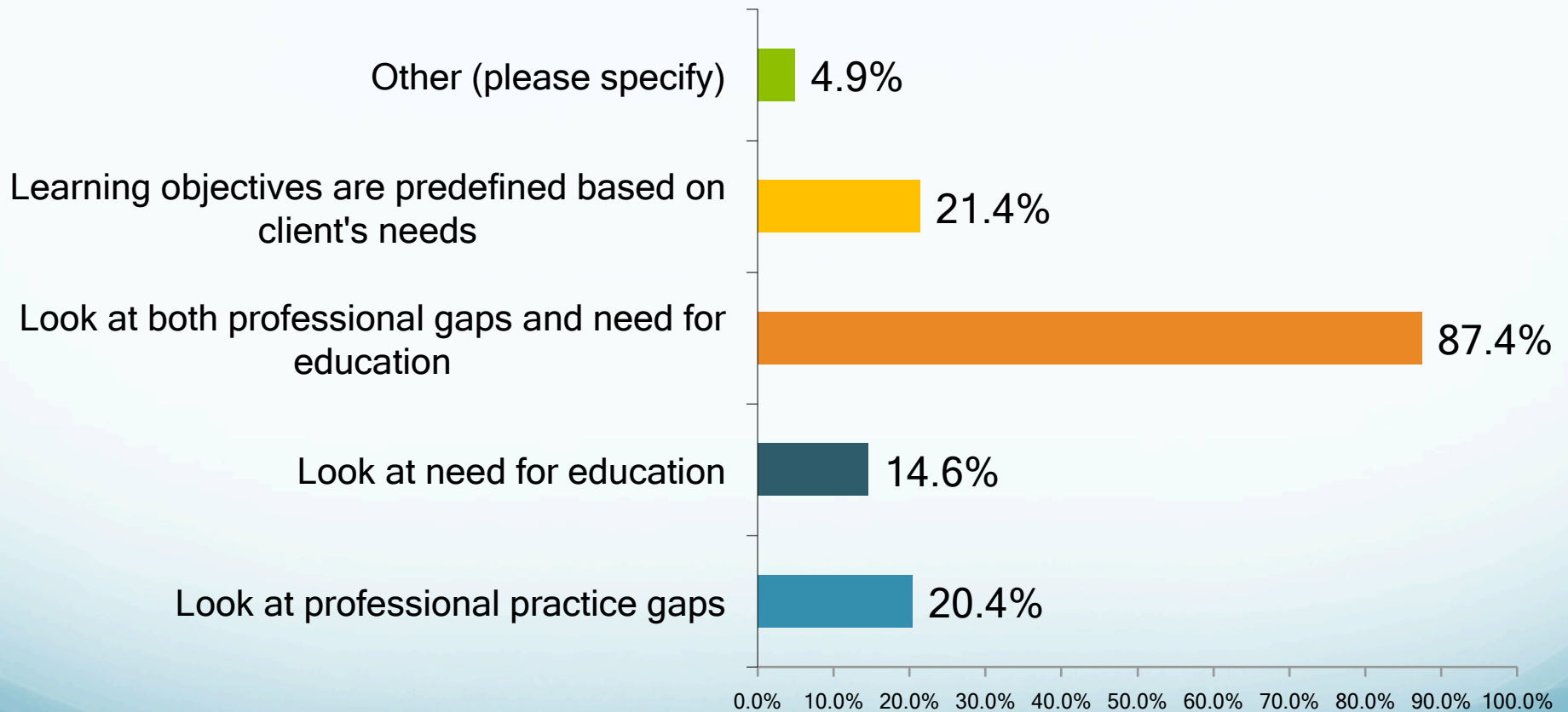
Q5: What sources of information do you use when identifying professional practice gaps? (Select all that apply.)



• Answered: 103 Skipped: 1

#AMWA-CME

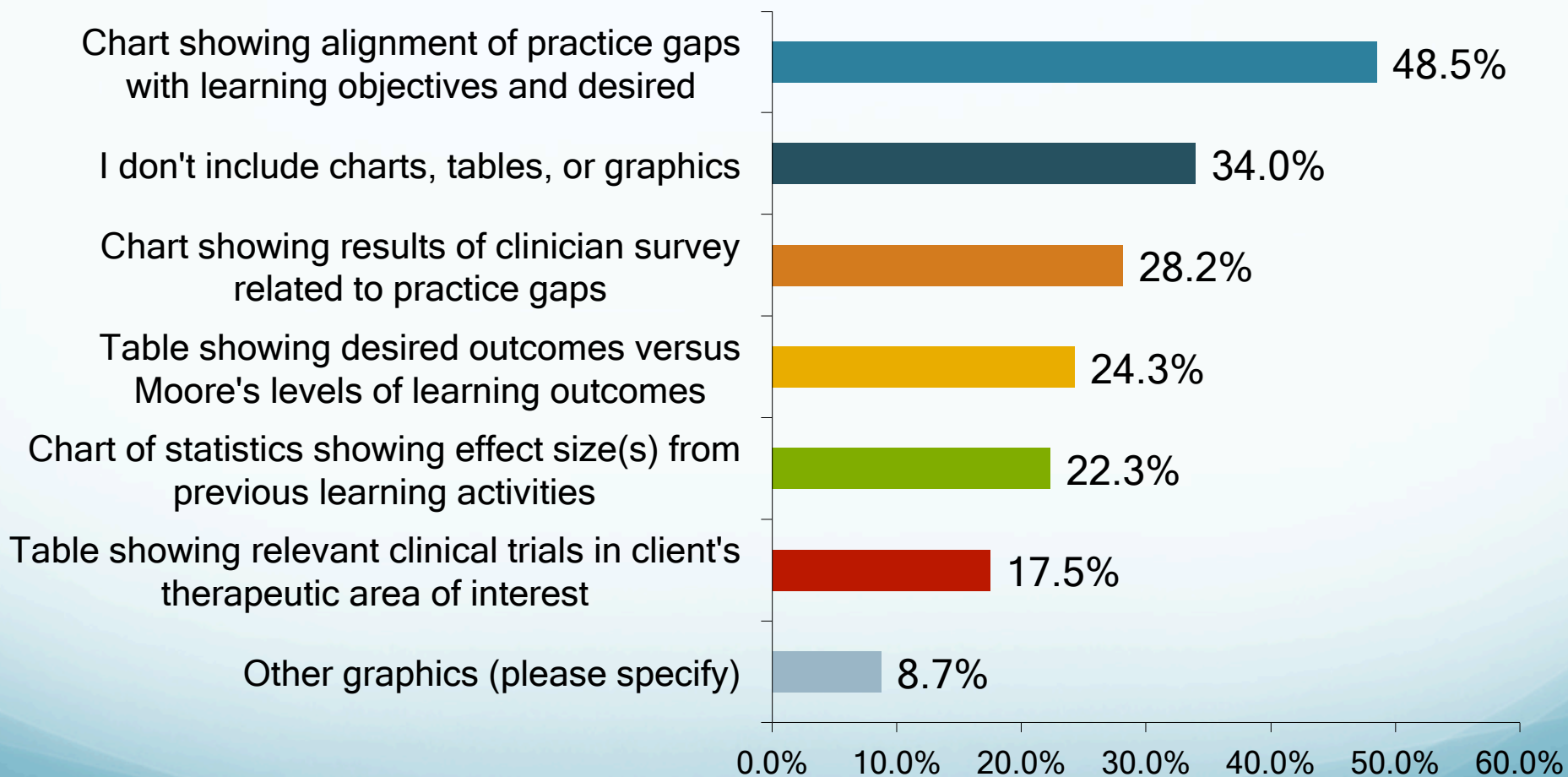
Q6: How do you formulate learning objectives? (Select all that apply.)



• Answered: 103 Skipped: 1

#AMWA-CME

Q7: What type of graphics, if any, do you include in a typical needs assessment? (Select all that apply.)



• Answered: 103 Skipped: 1

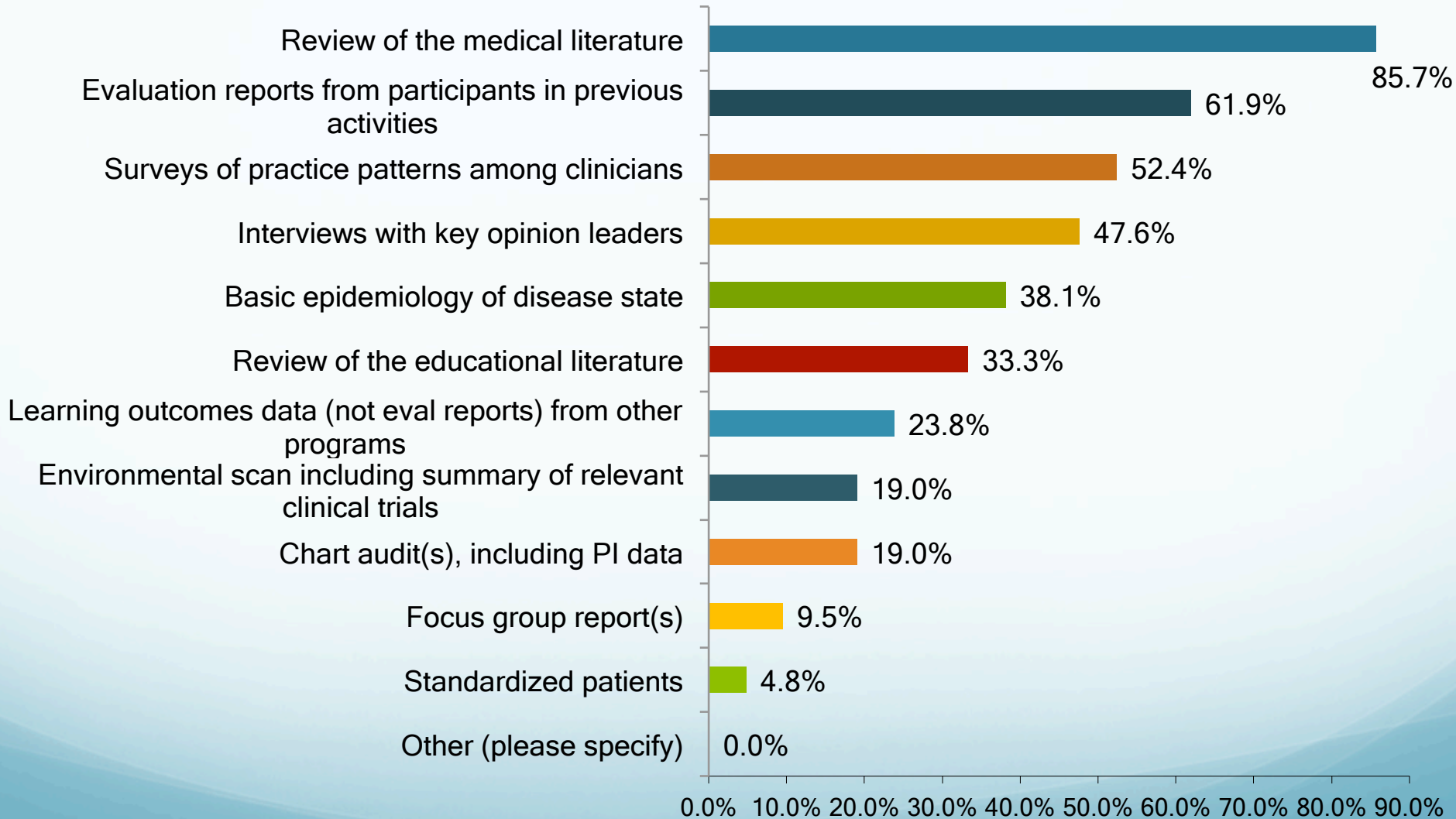
#AMWA-CME

Some Key Components of a Needs Assessment

- Gap Analysis
- Alignment Charts
- Other Graphics- Outcomes Data
- Sources
- References

- Other Components?

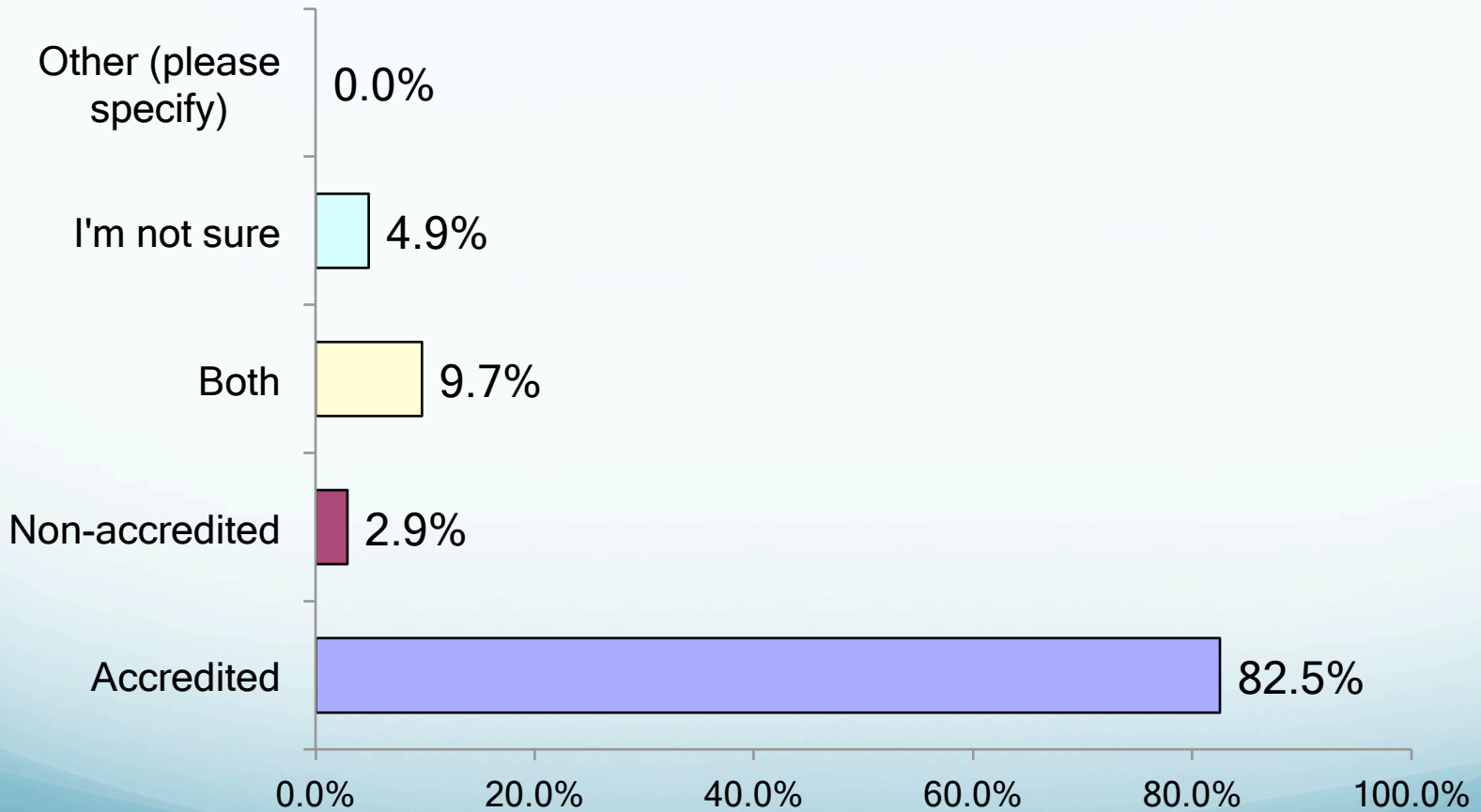
Q8: Which of the following types of data would your clients, or employer, consider most essential for inclusion in a first-rate needs assessment? (Choose top 3.)



Answered: 102 Skipped: 2

#AMWA-CME

Q9: Are the needs assessments you write typically used for accredited educational activities or for non-accredited educational activities? (Choose best answer.)



• Answered: 103 Skipped: 1

#AMWA-CME

For Future Research

- Best writing style to serve readers (highly clinical or more accessible)?
- What are best practices from the *reader's* perspective?
- Best *editing* practices (as opposed to writing)
 - Editorial style (AMA, APA, Chicago, etc.)
 - Sections, subheadings, references, table of contents
 - Presentation and formatting
- Pricing and scheduling

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