Office of Continuing Pharmacy Education (OCPE) Faculty/Speaker Guidance Document

2023-2024

The following guidance document contains information for speakers regarding creating a CE activity, ACPE guidelines and requirements, and tips for slides and presentations. Throughout the guidance document, there are 'key points' which summarize that particular section.

Contents

DENTISTRY • LAW • MEDICINE • NURSING • PHARMACY • SOCIAL WORK • GRADUATE STUDIES

ACPE defines continuing pharmacy education for the profession of pharmacy as a structured educational activity designed or intended to support the continuing development of pharmacists and/or pharmacy technicians to maintain and enhance their competence. Continuing pharmacy education (CPE) should promote problem-solving and critical thinking and be applicable to the safe practice of pharmacy.

Gap Analysis

Faculty/speakers are required to include gap analysis in the activity application. The following items are included in the gap analysis:

- State the potential or actual problem in pharmacy practice or the new product or development, that you intend to address in your activity.
- Identify the root cause of the identified gap (i.e., the specific knowledge, skill, attitude, experience).
- Explain how your learning objectives address the identified gap in practice.

All other elements (activity type, learning objectives, active learning, and assessments) must align with the gap analysis. Presentations with multiple target audiences (e.g., pharmacists and pharmacy technicians) will be required to submit a gap analysis for each target audience.

CE Activities and Activity Types

ACPE categorizes CE activities into three types:

- **Knowledge**: transmit knowledge (i.e., facts, recall)
  - The minimum contact hours required for knowledge-based activities is 15 minutes (0.025 CEUs).
- **Application**: apply the information learned
  - The minimum contact hours required for activity-based activities is 30 minutes (0.05 CEUs).
- **Certificate**: instill, expand, or enhance practice competencies through the systematic achievement of specified knowledge, skills, attitudes, and performance behaviors
  - The formats of practice-based activities should include a didactic component (live and/or home study) and a practice experience component (designed to evaluate the skill or application). The provider should employ an instructional design that is rationally sequenced, curricular based, and supportive of achievement of the stated professional competencies.
  - The minimum amount of contact hours for practice-based activities is 8 contact hours (.8 CEUs).

The activity type will align directly with the gap analysis. If the root cause is a lack of knowledge, the activity type would be knowledge-based; if the root cause is a lack of skill or experience, the CE activity would be application-based.

Learning Objectives

Key Points: Learning Objectives
- Learning objectives should be developed to address the potential or actual problem identified in the gap analysis and must align with the activity type.
- Learning objectives should be specific, measurable, and use appropriate action verbs that align with the activity type (knowledge vs. application).
- Action verbs must be measurable.
    - For example, if the activity type is knowledge-based, use verbs such as "define", "identify", "list", etc. If the activity type is application-based, use verbs such as "develop", "apply", "create", etc.
    - Verbs such as "understand" and "appreciate" are not appropriate as they are not measurable and are open to interpretation.
- **Speakers may submit up to 1 learning objective per 15 minutes of content**. For example, if a presentation is 30 minutes, up to 2 objectives may be submitted. If the activity is 1 hour (60 minutes), up to 4 learning objectives may be submitted.

What are learning objectives?
An instructional objective is a statement that will describe what the participant will be able to do after completing the instruction (activity). (Kibler, Kegla, Barker, Miles - 1974).

Why are learning objectives important?
Learning Objectives:
- Provide a focus that enables instructors and participants to work toward a common goal
- Provide a means of measuring whether the participants have succeeded in acquiring skills and knowledge
- Allow opportunity for self-evaluation

When are learning objectives used?
- Before an activity is developed (by planner, host)
- Before an activity is taught/given (by faculty/speaker)
- Objectives should be reviewed with participants at the beginning of the activity

Steps to creating learning objectives
1. Identify the gap.
2. Plan the activity. You might consider the following questions when planning your activity.
    a. How do you envision engaging the audience?
    b. How are you going to deliver the activity?
3. Determine what the participant will take away from the activity.
4. Create the learning objectives.

a. If an activity has multiple target audiences (e.g., Pharmacist and Pharmacy Technicians), a unique set of learning objectives may be required for each target audience.

Developing Learning Objectives

Objectives must:
- Be specific and measurable.
- Specifically address the identified educational need.
- Align with the activity type (knowledge vs. application).
  - Knowledge-based activities use verbs such as "define", "identify", "list", etc.
  - Application-base activities use verbs such as "develop", "apply", "create", etc.
  - View the table on page 6 for more examples of verbs by activity type.
- Be addressed by an active learning activity.
- Be evaluated using a learning assessment.

How Should Learning Objectives be Written?
- Start with the phrase: "At the conclusion of this activity, the participant should be able to:"
- Then state the things participants will be able to do.
- Learning objectives have two parts: Verb and Stem.
  - Verb: chosen by activity type that elicits or describes a measurable/observable behavior
  - Stem: Outcome-based take away
- Each learning objective should contain only **one** outcome/action. For instance, an objective that states "Define and describe the role of pharmacists in patient care" should be split into two objectives, "Define patient care" and "Describe the role of pharmacists in patient care". The exception to this is, "Compare and contrast".
- Learning objectives are learner centered. Objectives state what the learner will be able to do at the end of the training; not what the faculty/speaker will do during the presentation. As an example, "Describe the role of pharmacists in patient care" indicates what the learner will be able to do at the completion of the training as opposed to, "In this session, we will review the role of pharmacists in patient care" which states what the faculty/speaker will do during the presentation.
- Avoid using verbs that are vague or cannot be objectively assessed. Examples include, but are not limited to "know", "understand", and "appreciate".
- Learning objectives should be the foundation for all other aspects of the activity/presentation Content, activities, assessments, etc. should all align and correspond with the objectives. Faculty/speakers are encouraged to create thoughtful objectives and to reflect on what participants will take away from the activity.

For more information or additional resources:
https://www.ncbi.nlm.nih.gov/pmc/articles/PMC5944406/pdf/i2333-0406-19-4-1a.pdf

Active Learning and Assessments

Key Points: Active Learning and Assessments

- CE activities must contain both active learning and an assessment(s)
- Active learning and assessments should align with the gap analysis, activity type and learning objectives (i.e., the action verbs).
- Faculty/speakers should be proactive in planning active learning and assessment strategies; faculty/speakers are required to submit the active learning and assessment strategies in the application form. For activities with multiple target audiences (e.g., Pharmacists and Pharmacy Technicians), unique active learning and assessment strategies may be required for each audience.
- Participants should receive feedback on correct vs. incorrect responses.

Active learning is an instructional strategy in which the participant engages in exercises within an activity to practice the concepts, skills, or knowledge being taught. Active learning helps participants acquire and retain material/concepts more effectively and provides opportunity for participants to assess their own progress in achievement of learning objectives. Additionally, active learning engages participants throughout the activity.

Assessments are activities that measure the participant's achievement of the learning objectives. In some instances, the active learning and assessments may be the same activity. For example, a faculty/speaker might utilize poll questions as an active learning exercise. These poll questions could also be the assessment since the speaker will be able to gauge the participants' achievement of the learning objectives. However, keep in mind that assessments must align with the learning objectives – including the 'condition' and 'degree' and the 'requirements for successful completion' as written in the activity announcement. (Example – if the requirements for successful completion include a pass rate of 70%, only participants who achieve this benchmark can receive CE credit. If the successful completion does not include a pass rate, participants are not required to reach a minimum score to receive CE credit).

Participants must receive feedback on the correct vs. incorrect responses for active learning and assessments. It is recommended that faculty/speakers include an explanation of why a response is correct or incorrect with the feedback.

Active learning and/or assessments should not be after-thoughts after a presentation is created. They should be planned, thought-out, and intentional. Faculty/speakers will be required to submit the active learning and assessment strategies during the application process.

Using Bloom's Taxonomy levels, ACPE has created suggested active learning strategies. See the following table.

Suggested Active Learning Strategies for Use with ACPE's CPE Activity Types and Bloom's Taxonomy Levels			
Activity Type	**Verb Examples**	**Suggested Active Learning**	**Learning Assessment Examples**
Knowledge	Knowledge-type verbs - Define - Repeat - List - Record	Lecture Visuals Examples Illustrations Analogies	Recall Facts Multiple Choice, True/False, and Matching Questions Can be delivered via written post-tests, polls/surveys, within the presentation slides, etc.
	Comprehension-type verbs - Discuss - Describe - Explain - Identify - Translate - Restate	Test Review Writing Presentations Matching questions/answers Questions Discussion Report Think-pair-share	
Application	Application-type verbs - Interpret - Apply - Use - Demonstrate - Illustrate	Role play Simulations Practice exercises Demonstrations Projects	Application of Principles Case Studies Discussion Pro/Con Grids Application Exercises Demonstration Exercises Role Play or Simulation
	Analysis-type verbs - Distinguish - Analyze - Differentiate - Calculate - Compare and contrast	Case Studies Problems Discussion Pro/con grids Application exercises	
	Synthesis-type verbs - Plan - Compose - Design - Propose - Formulate - Arrange - Construct - Create - Prepare	Problems Case studies Develop plans Simulations Projects	
	Evaluation-type verbs - Judge - Evaluate - Rate - Compare - Revise - Assess - Estimate - Measure	Case studies Problem exercises Projects Critiques Simulations	

Content Notes for CE Activities

Educational content must be fair and balanced. Additionally, any clinical content presented must support safe, effective patient care. This means that:

- All recommendations for patient care in accredited continuing education must be based on current science, evidence, and clinical reasoning, while giving a fair and balanced view of diagnostic and therapeutic options.

- All scientific research referred to, reported, or used in accredited education in support or justification of a patient care recommendation must conform to the generally accepted standards of experimental design, data collection, analysis, and interpretation.

- Although accredited continuing education is an appropriate place to discuss, debate, and explore new and evolving topics, these need to be clearly identified as such within the program and individual presentations. It is the responsibility of accredited providers and joint providers to facilitate engagement with these topics without advocating for, or promoting, practices that are not, or not yet, adequately based on current science, evidence, and clinical reasoning.

- Content cannot be included in accredited education if it advocates for unscientific approaches to diagnosis or therapy, or if the education promotes recommendations, treatment, or manners of practicing healthcare that are determined to have risks or dangers that outweigh the benefits or are known to be ineffective in the treatment of patients.

The following best practices are recommended when presenting clinical content:

- Clearly describe the level of evidence on which the presentation is based and provide enough information about data (study dates, design, etc.) to enable learners to assess research validity.

- Ensure that, if there is a range of evidence, that the credible sources cited present a balanced view of the evidence.

- If clinical recommendations will be made, include balanced information on all available therapeutic options.

- Address any potential risks or adverse effects that could be caused with any clinical recommendations.

Although accredited CE is an appropriate place to discuss, debate, and explore new and evolving topics, presenting topics or treatments with a lower (or absent) evidence base should include the following strategies:

- Facilitate engagement with these topics without advocating for, or promoting, practices that are not, or not yet, adequately based on current science, evidence, and clinical reasoning.

- Construct the activity as a debate or dialogue. Identify other faculty who represent a range of opinions and perspectives; presentations should include a balanced, objective view of research and treatment options.

- Teach about the merits and limitations of a therapeutic or diagnostic approach rather than how to use it.

- Identify content that has not been accepted as scientifically meritorious by regulatory and other authorities, or when the material has not been included in scientifically accepted guidelines or published in journals with national or international stature.
- Clearly communicate the learning goals for the activity to learners (e.g., "This activity will teach you about how your patients may be using XX therapy and how to answer their questions. It will not teach you how to administer XX therapy").

These expectations are drawn from Standard 5 of the ACPE Standards for Integrity and Independence in accredited continuing education.

Presentation Slides and Educational Materials

- Activity Title and Learning Objectives
  - The activity title and learning objectives must match how they are written in the Activity Description Form (ADF).
  - The ADF will be sent to the host organization upon completion of the application review. The title and learning objectives in the activity application will be used in the ADF unless otherwise updated by the activity host.
    - For CE activities containing multiple presentations, the title for the **full activity** and not the individual presentation titles, must be on the slides. For example, if you are presenting a clinical pearls session entitled, "Clinical Pearls in Community Practice", your title slide must contain this title. Individual sessions can be listed as sub-titles.
  - For RSS activities, **the activity title and learning objectives on the ADF must be on the educational materials and activity announcement**. The activity-specific title and learning objectives may also be included.
- Disclosure Statements
  - Faculty/speakers must include a disclosure statement, written, verbal, or both.
  - If there is a necessary disclosure, OCPE will provide text to the host organization.
- References:
  - References or reference numbers must be included and legible, where appropriate.
  - Reference should be complete; the source should be easy for participants to find.
  - Faculty/speakers are encouraged to also include a 'References' slide at the end of the presentation.
- Bias and Commercialism
  - Slides and educational materials must be free of any undue bias and support from ineligible organizations.
  - Presentations must be developed and delivered without the influence or involvement of ineligible companies.
  - Slides/presentations may **not** contain the logo of an ineligible organization (ex. the logo of a pharmaceutical company may not be included within the slides/presentations).
- Copyright and Confidentiality
  - Slides and educational materials must adhere to Copyright law and other intellectual property laws or policies.
  - Speakers should have proof of ownership or permission to use copyrighted materials.
  - Images of patients must maintain confidentiality wherever possible.
  - Patient cases should be adequately de-identified.

Slide Design Tips

- *If you need to apologize for a slide, it is preferable to leave it out.*

- Uniformity
  - Use a slide master to ensure the slides are as uniform as possible in terms of background, logos, fonts, and colors. Avoid slides that appear to have been taken from a previous presentation. The audience expects that the faculty/speaker created the presentation especially for them.
  - Use good contrast to enhance visibility of the materials.
    - Most consider the best contrast for visibility is a dark (e.g., dark blue) background with a white **or yellow bolded lettering**. If using a dark background, do NOT use other colors (like red or even light blue). Even though they may be visible on a computer screen, they will not be easily visible to the audience on a projection screen.
    - Another high contrast method is to use a white or pale yellow background with dark lettering. This gives more options in terms of color selection. If using a light background, do not pick other colors for figures or text that are also light in color. These will be difficult to read.
  - Use color and bolding to provide emphasis when needed.
  - Avoid using more than 3 colors on a text slide.
  - Avoid using red and green to differentiate parts of the slide. This will be a problem for those with a common form of color blindness.

- Backgrounds & Special Effects
  - Resist using fancy or detailed backgrounds. Although they may look nice, they can be difficult to read.
  - Avoid unnecessary sounds and special effects (e.g., animation).
  - If using videos or audio files, do a test of the presentation on the computer and sound system that will be used during the presentation. Always have a copy of the video/audio clip case of any technical issues.

- Text
  - Font selection should include easy-to-read fonts such as Arial. Times New Roman and Courier can be difficult to read. Use the same font throughout the presentation.
  - Font size should be easy to read from the back of the presentation room. Use at least 36-point font for titles and at least 24-point for bullets. A 20 pt font is generally the smallest readable font size. It is a good size to use in footers. Make it easy on the audience - chose a font size that is as large as possible.
  - Font color tips are included above in the section on Contrast.
  - Note the 7 x 7 Rule for readability (or – the make slides easy to read):

- 7 words per line
- 7 lines per slide
  - o Consider a 40-word limit on a slide.
  - o Spell check slides before the presentation.

- Figures and Tables
  - o Provide titles for all figures and tables.
  - o Label all axes on chart slides and include units.

- Variety
  - o Whenever possible, include pictures, tables, and figures to make the point.
  - o Over-reliance on text slides helps the faculty/speakers (using slides as an outline) but may be annoying and boring to the audience. It is distracting for the audience to read detailed text slides while the faculty/speaker is speaking.
  - o Use phrases rather than full sentences on slides unless providing a direct quotation.
  - o If presenting data in tables, leave only essential data in the slide to make the point. Keep it uncluttered and easily readable for the audience.

- Back-Ups
  - o Bring a hard copy of the slides in case of an equipment failure.
  - o Bring an electronic version of the slides **in more than one format**. Bring the suggested format and at least one other electronic form of the presentation (e.g., USB thumb drive). Check with the program coordinator to see what formats are compatible with the equipment to be used.

Handouts
- Most audiences appreciate having handouts.
- Consider providing copies of the slides that include space on which to take notes during the presentation.
- Be sure to point out last minute changes and/or slide order in the handout.
- Other ideas for handouts:
  - o Copies of an article that enhances a key point in the presentation.
  - o The learning objectives and post-test self-assessment questions

Presenting Tips

- Speaking & Engaging the Audience
  - Project your voice from the diaphragm.
  - Speak loud enough that every member of the audience can hear you clearly.
  - Check to be sure that the sound is reaching the back of the room before beginning the presentation.
  - Avoid making unnecessary sounds during the presentation (e.g., "uh," "um"); it is preferable to be silent than to use these verbalized pauses.
  - When preparing to make an important point, signal the audience to refocus their attention. For example, varying voice levels can be an effective way to regain audience attention.
  - Watch for signals from the audience – the sound may have been lost, an instructional point may need clarification, or some other problem may be evident.
  - Try to make eye contact with members of the audience throughout the presentation; move your attention to all areas of the audience during the presentation.
  - If nervous about making eye contact, try looking at the forehead or just above individuals in the audience.

- Presenting Using Virtual Platforms:
  Presenting virtually (e.g., Zoom, WebEx, etc.), can offer its own challenges. For tips on presenting virtually, view the following resource.

  Abbajay, M. (2020, April 20). *Best Practices For Virtual Presentations: 15 Expert Tips That Work for Everyone*. Forbes. Available at: https://www.forbes.com/sites/maryabbajay/2020/04/20/best-practices-for-virtual-presentations-15-expert-tips-that-work-for-everyone/?sh=1503fe853d19

  Forbes. (2020, July 13) *How to Ace a Virtual Presentation*. Available at https://www.youtube.com/watch?v=atLvsjIIsOI.

  Abrahams, M. (2016, September 20). *10 Tips for Giving Effective Virtual Presentations. Stanford Business*. Available at https://www.gsb.stanford.edu/insights/10-tips-giving-effective-virtual-presentations.

  Doyle, A. (n.d.). *Nail Your Virtual Presentation With These Tips*. Convene. Available at: https://convene.com/catalyst/virtual-presentation-tips/.