**University of Ottawa**

**Office of Continuing Professional Development (OCPD)**

Needs assessment survey

Guide and *template*

**Office of Continuing Professional Development**

**uOttawa**

Bob Parson

***Robert Parson, M.Ed.***

Directeur, Formation et agrément

Director, Education and Accreditation

Formation professionnelle continue / Office of Continuing Professional Development

Université d’Ottawa / University of Ottawa

**Pavillon LOEB Building**  
725 Parkdale Ave., Office 158  
Ottawa ON K1Y 4E9

Tel.: 613-798-5555 Ext. / Poste 16879

Fax: 613-761-5262

Email: [rparson@toh.on.ca](mailto:rparson@toh.on.ca)

[CMEaccreditation@toh.on.ca](mailto:CMEaccreditation@toh.on.ca)

October 2014

Contents

[Unperceived (objective) needs 2](#_Toc401737235)

[Perceived (subjective) needs 2](#_Toc401737236)

[Steps to take: 2](#_Toc401737237)

[Examples of Needs Assessment Descriptions 2](#_Toc401737238)

[Unperceived needs- examples 2](#_Toc401737239)

[Perceived needs- examples 2](#_Toc401737240)

[Needs Assessment Survey (Perceived) Template 2](#_Toc401737241)

[Demographics 2](#_Toc401737242)

[Specific Content 2](#_Toc401737243)

[Other possible questions 2](#_Toc401737244)

[Preferred Learning Formats 2](#_Toc401737245)

[Additional resources and references 2](#_Toc401737246)

|  |  |
| --- | --- |
| **This document** | This document contains description and examples of needs assessment in CPD.  It is followed by a sample needs assessment survey that can be adapted for your “perceived needs” assessment. |
| **Definition and purpose: needs assessment** | Needs assessment is used to define the rationale and background for the program.   * Why is this area of interest? * What is the gap that we are trying to fill?   There are two parts to a needs assessment for Continuing Medical Education   * Unperceived needs * Perceived needs |
| Unperceived (objective) needs | These needs are the gaps between present and optimal care that a learner does not know exist; when learners do not know what they do not know.  They address the gap from the experts’ point of view: what are the problems related to the perceived health issues? For example:   * There may be general issues that arise related to internists and radiologists communicating well and efficiently related to the system or skills of the practitioners or * There may be specific issues such as challenges in diagnosing specific conditions eg. pneumonia that are very prevalent and have serious implications   Given the areas you wish to investigate, choose the methods you wish to use:   * The published literature, syntheses of the literature, guidelines? * Sources of quantitative data that would provide info about the problems?   Examples can include   * Self-assessment tests * Chart audits * Chart stimulated recall interviews * Direct observation of practice performance * Quality assurance data from hospitals, regions * Standardized patients * Provincial databases * Incident reports * Published literature (RCT, cohort studies) |
| Perceived (subjective) needs | These address the gap from the learners’ point of view. What are they looking for? What is most important to them and their patients?   * Would a questionnaire or survey for potential attendees provide the kind of info you need? * Would focus groups? * Do you suspect that the gaps in best practices exist due to lack of knowledge, skill, a need for change in how the profession deals with something, glitches in the system, communication issues?   Examples can include   * Self-assessment tests * Chart audits * Chart stimulated recall interviews * Direct observation of practice performance * Quality assurance data from hospitals, regions * Standardized patients * Provincial databases * Incident reports * Published literature (RCT, cohort studies) * Other: please specify: |
| Steps to take: | 1. Identify the objectives of your survey based on the above 2. Create your needs assessment survey.    1. Below you will find a sample of questions that you can use to create a survey for your target learners.    2. You can supplement these questions with topics that are specific to your field, your particular needs.    3. You can delete those questions that are not important to you. (We want to get the information we need but the briefer the survey, the more attractive it will be for those pressed for time.) 3. Submit the survey to the CPD office.   If you have questions or concerns feel free to contact   * You program planner, or * Robert Parson   Directeur, Formation et agrément /Director, Education and Accreditation  Formation professionnelle continue / Office of Continuing Professional Development  Université d’Ottawa / University of Ottawa  Tel.: 613-798-5555 Ext. / Poste 16879  Email: rparson@toh.on.ca  CMEaccreditation@toh.on.ca |

|  |  |
| --- | --- |
| Examples of Needs Assessment Descriptions | |
| Unperceived needs- examples | **Remember:**  These needs are the gaps between present and optimal care that a learner does not know exist; when learners do not know what they do not know.  They address the gap from the experts’ point of view: what are the problems related to the perceived health issues  **The following are from actual CPD accreditation requests.**  There is ample evidence in the literature that physicians thrive better and meet career and research goals easier when they have an effective mentor to aid that process. There is also evidence to suggest that in the field of medicine we are often assumed to be good mentors just by virtue of the fact that we are in this apprentice-type of learning environment.  There is clear evidence for the value of interactivity within formal CPD programs (recent published met analysis). Even small changes in knowledge or attitude that are sometimes acquired during a lecture type presentation tend to be short term and rarely impact medical practices. Although this observation has been clearly established through CPD research, lecture type presentations continue to be the predominant format for a high proportion of CPD programming.  A panel of Canadian and US family physicians, and … prioritize the (programs) eligible for CME/CPD activities among all reviews available for... The eligibility criteria are: perceived knowledge, competence, or practice gaps, perceived relevance for family physicians, access data (abstract and full-text) to reviews in North America.  We then built on (previous surveys) by reviewing advances in … by reviewing relevant literature and operational changes that have occurred in .(topic area) in the last year. As well, the current clinical practice guidelines and policy changes to other (topic area) labs within North America were also relevant in deciding on topics for this event. |
|  | A needs assessment survey was sent to the target audience in June 2010 (see attached). The Planning Committee also considered the feedback provided by attendees on speaker evaluations from previous sessions that were held on this topic. (see attached)  To develop the content of this event we conducted a synthesis of the research literature. The (topic area) research that we intend to present at the … conference is based on themes that were found with a review of current (topic area) research literature. These themes include: …..  Reviews of scientific literature in (topic area) and clinical practice guidelines (in particular the … guideline) were done. An informal synopsis provided by the Director of the Ontario … was also useful as it provided additional insight into the needs of professionals working in Ontario.  We also examined:  –CMPA data –  –Implementation of clinical practice guidelines-data  –Performance and competency data – |
| Perceived needs- examples | **Remember:** “The gap from the learners’ point of view”. What are the learners looking for? What is most important to them and their patients?”  **The following are from actual CPD accreditation requests.**  The scientific planning committee used evaluation forms from previous symposiums as a starting point to develop the content for this year.  This will be the third time Drs. … have offered this workshop. Each year the evaluation from the previous year provides input for the content and design of the next. ... The presenters … rely on the feedback from participants; requirements for producing accreditable CPD and their own experience in working with Faculty of Medicine presenters.  The planning committee was guided by the results of a needs assessment, to determine the speakers and  topics. An online questionnaire was developed using “Survey Monkey”. Multiple choice and open-ended questions were used to gather demographic information and needs and preferences with respect to the topics, series format, and timing. An email with the survey web link was distributed to our partner agencies, with the request that they distribute broadly within their networks.  The committee drew heavily upon information provided by the evaluation of last year’s program (6th annual) as well as the results of ongoing clinical research education session evaluations to determine this year’s course outline.  … created based on the topics identified from the course evaluation forms from the previous six years as well as evaluations from ongoing clinical research education sessions.  We queried the provincial … society and found that (topic area) is a topic that (specialists) in Canada are hoping to hear at meetings. Based on this data, the following needs were identified and utilized in the creation of this program and its learning objectives… |

|  |  |
| --- | --- |
| Needs Assessment Survey (Perceived) Template | |
| Demographics | *(Choose what will be useful; delete those questions that you don’t want to use.)*  **Please check your professional role:**  FP/GP  Resident  Nurse  Nurse Practitioner  Other Healthcare Professional (please specify) |
|  | **In what setting do you practice?**  Inner-city group practice  Inner-city solo practice  Urban group practice  Urban solo practice  Rural group practice  Rural solo practice  Other (please specify) |
|  | **How long have you been in practice?**  < 1 year  1- 5 years  6 - 10 years  11- 15 years  16 - 20 years  > 21 years  **Year of your undergraduate medical graduation: \_\_\_\_\_\_\_\_\_**  **Year of completion of your MOST RECENT postgraduate medical training (i.e., residency/internship):\_\_\_\_\_\_\_** |
| Specific Content | *Use the following type of questions to find out what is of interest to your target audience, where their learning needs are.*  *Choose what will be useful; add those elements or topics that are specific to your program; delete those questions that you don’t want to use.*  **Please rate your interest in learning more about the following topics related to … *(insert topics below)***  **In general, what are the most challenging aspects when addressing/performing this topic or procedure…?** *(insert topic(s)*  *below, these are samples)*   * Lack of resources in the community to … * Lack of referral options for services * Knowledge of patient management * Knowledge of … long term outcomes * Knowledge of physical examination requirements * Lack of information for patients and their families |
|  | **Do you need information on obtaining the resources you need for…** *(insert topics below)*  Or  **How easy is it to get the resources you need for…** *(insert topics below)*  Or  **What are the most challenging resources to access** *(select all that apply) (insert resources below)*  **Is there a problem case in your practice that you would like discussed in a workshop session about …? Please give a brief synopsis.**  **Are there any other specific topics or issues that you would like addressed in the …** *(name of program/conference/update lectures?)*  **Please list them below.** |
| Other possible questions | Physical exam:  **What physical exam skills would you like to have updated? Please indicate all skills that are of interest.** *(insert topics below)*  Procedural skills:  **What skill training would be beneficial to you? Please check all that are of interest**. *(insert topics below)*  Communications skills:  **What communications skills would be helpful to you?**  Other;  **Are there any other skills that you would like us to demonstrate?**  **How confident are you in your ability to**…*(insert topics below)*      Other question, specific to your audience’s needs |
| Preferred Learning Formats | *Choose what will be useful; add those elements that work with your program; delete those questions that you don’t want to use.*  **(Face to face formats)**  **Please rate the importance of the following learning activities for you:**   * Plenary presentations * Small group sessions (<50 attendees) * Small group(< 15) case-based presentations * Blended learning, (some technology and some live elements) * Brief, didactic presentations * Interactive workshops * Simulations * Expert panels * Time spent with experts * Confirmation that I am up-to-date in my clinical practices * Time spent with colleagues outside of sessions   **(Other)**   * Web-based courses * Video conferences * Personal study (self-assessment, practice audit, personal learning projects) * Other – Please specify   **Location, time, date questions**   * Programs that run over several days * A series of sessions such as biweekly on Saturday morning * What days of the week are most convenient for you? * What times in your days are most convenient for you?   **Please check your preferred venue:**   * Ottawa Conference and Event Centre (formally the Hampton Inn Convention Centre) * The Ottawa Hospital Civic Campus * Other |

# Additional resources and references

*Royal College of Physicians and Surgeons of Canada (2014) Identifying the educational needs of the target audience*

*Available at:*

<http://www.royalcollege.ca/portal/page/portal/rc/members/cpd/cpd_accreditation/group_learning/cpd_accreditation_toolkit/cpd_needs_assessment>

McMaster University Faculty of Health Sciences Continuing Health

Sciences Education Program (2009)*Guidebook for Planning and Delivering Continuing Professional Development Programs and Events* ,pp. 9-11

<http://www.fhs.mcmaster.ca/conted/documents/CHSE-Guidebook_web.pdf>