

## NC AHEC Program CPD Planning Policy

This policy and accompanying guidelines were developed as a result of the 2020 Continuing Professional Development (CPD) Task Force Recommendations Report to address the fragmentation of NC AHEC CPD through the creation of a solid, effective, and efficient statewide process.

Communication about activities that have the potential to affect other regions is essential. All AHEC CPD planners need to follow the CPD [policy](#) and [workflow](#) process when planning any regional or statewide CPD activities.

### Policy

CPD that *was planned to meet a statewide need from the beginning of the planning process* may be marketed statewide if the workflow guidelines outlined here are followed.

Regional AHEC CPD activities *may not* be marketed to learners in other regions; however, regional AHEC CPD activities that are recurring or repeated *may* be marketed to past participants of that particular program, regardless of region.

### Workflow Process

To be effective, AHEC planners must follow the same workflow process for both (I) *determining a statewide need* for an activity and for (II) *planning an activity*. Depending on the type of statewide activity, (III) *additional processes* may need to be followed.

#### I. Determining statewide need

1. As any CPD activity is planned, planners will search web services for similar topics targeting similar audiences. Planners will search programs that are both “planned” and “open”. See [Planned Activity instructions](#) (hyperlinked from the IT basecamp).
2. To determine if a program is meeting a statewide need and is using the statewide market, use the ‘Statewide Tags’ dropdown to filter courses by available tags. See [Course Tagging instructions](#) (hyperlinked from the IT basecamp).
3. If an activity with a similar topic targeting a similar audience is identified, there may not be a need for an additional activity. Therefore, the CPD planner will either reach out to the other region(s) for more information and/or potential collaboration or decide if they will reschedule/reimagine their event if it is considered duplicative\*.

\*Definition of duplicative:

- **For regional and statewide virtual activities and for statewide face-to-face or hybrid activities:** any other regional or statewide virtual activity with a similar topic targeting a similar audience planned *within a one-month timeframe is considered duplicative*.
- **For regional face-to-face activities:** any other geographically close regional face-to-face activity with a similar topic targeting a similar audience planned *within a one-month timeframe is considered duplicative*.

4. If planners choose to collaborate on, instead of rescheduling, events that fall within those time frames, then they should consider using the [co-hosting worksheet created by the Operations Team for joint CPD programming](#). (this is a guide that is hyperlinked from the Ops Team basecamp and will not be seen by the Program Office).

## II. Planning an activity

1. To facilitate the accuracy and effectiveness of the above, all CPD planners/program specialists will enter CPD information into web services early in the process as a “planned” event. See [Planned Activity instructions](#) (hyperlinked from the IT basecamp). As much of the following information as possible should be entered into web services as soon as possible:
  - Title draft
  - Date (or estimated) and time
  - Keywords
  - Target audience
  - Rough objectives
  - Description: brief overview of activity; \*include contact information for other AHECs to use in the event an opportunity for collaboration arises\*
  - Note: there are additional required fields in web services; planners may fill these items in to the best of their ability and per regional AHEC policy and then make changes per regional AHEC policy before the program is switched to “open”.
  - Tag program as appropriate for statewide marketing. See [Course Tagging instructions](#) (hyperlinked from the IT basecamp) and [Tagging CPD Activities Checklist](#) (hyperlinked from the Ops Team basecamp).
2. Once activity information is sufficient per regional AHEC criteria, planners may switch the program from “planning” to “open”.
3. If the program is cancelled while in “planning”, the CPD planner must go into web services and delete it as soon as that decision is made.
  - To check the current list of courses that are currently in “planning”, log into [www.ncahec.net](http://www.ncahec.net) and then click the following link: [https://www.ncahec.net/courses-and-events?user\\_courses=0&status\\_id=4](https://www.ncahec.net/courses-and-events?user_courses=0&status_id=4) . Then, set the filter to the AHEC region.

## III. Additional Processes

Multiple pathways lead to the development of a CPD activity which could benefit health and human service professionals statewide. Depending on the pathway, additional processes may need to be followed to ensure timely communication.

### 1. Regional or Discipline “Homegrown” CPD Activities

If the regional AHEC or statewide discipline group has an idea for an educational activity that could meet a statewide need, the idea should be socialized with the statewide discipline group(s) and/or the Program Office (contact: [jill\\_forcina@ncahec.net](mailto:jill_forcina@ncahec.net) and/or [caroline\\_collier@ncahec.net](mailto:caroline_collier@ncahec.net) ) for willing AHEC partners and/or Program Office support. The [workflow process for planning all CPD activities](#) should be followed upon the decision to pursue the activity.

### 2. Outside Partnerships\* for CPD Activities

Outside partners, including the NC Department of Health and Human Services, may request a statewide CPD activity from a regional AHEC. If the regional AHEC is partnering with an outside organization for statewide educational activities, the [workflow process for planning all CPD](#)

[activities](#) should be initiated within two business days of agreement/contract approval between the AHEC and the partner.

*\*Public contracted activities may require flexibility in these timeframes. Email [jill\\_forcina@ncahec.net](mailto:jill_forcina@ncahec.net) and/or [caroline\\_collier@ncahec.net](mailto:caroline_collier@ncahec.net).*

*\*Private contracted activities are never considered duplicative.*

### 3. Program Office statewide activities

For a statewide project initiated by the Program Office, a Request for Proposal (RFP) will be released to seek proposals from regional AHEC(s). The [RFP components](#) (hyperlinked from the Ops Team basecamp) may vary from project to project but are generally project overview, expectations, deliverables, timeline, staff, and budget. The [workflow process for planning all CPD activities](#) should be initiated within two business days of the award announcement from the Program Office.

### 4. Traditional statewide activities

CPD activities that have historically been statewide are tracked at the Program Office as part of the region's annual work statements. See the [list of traditional statewide activities](#) (hyperlinked from the Ops Team basecamp). These programs should be planned per the [workflow process for planning all CPD activities](#); however, in order to assure an ongoing statewide need for these activities, an updated needs assessment is required in regional works statements each year.

## Measuring Effectiveness

Policy effectiveness will be measured at regular intervals under the guidance of the CPD Chairs Group, and changes to the policy may be made at any time if feedback warrants such a change and after proper cross-cutting service lines have been consulted.

Outcomes examined include but are not limited to the following: planner perception of # of programs that need rescheduling, # of programs that can be offered collaboratively, # of emails asking for permission to market, and planner experience of the workflow process.