WHERE DID THE YEAR GO? MAKING YOUR PEC AND APE THE ABSOLUTE BEST!

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Jonathan Davis, MD – PD, Georgetown University
Erica Shaver, MD – PD, West Virginia University

The Program Evaluation Committee (PEC) and its major work, the Annual Program Evaluation (APE), are critical to your program's ongoing evaluation, improvement, and success. Does your PEC run efficiently and effectively? Do you have a successful and regimented plan for completing, and more importantly, implementing your APE to make positive change and keep your program on the upward trajectory? During this session, we review best practices in managing your PEC and developing a comprehensive APE to obtain the valuable information you need to move forward with your program success!

After this session participants should be able to:

1. Discuss best practices around management of your PEC.
2. Understand year long timelines and agendas for your PEC.
3. Demonstrate tools that will help improve the efficiency and effectiveness of the PEC. [e.g. executing a successful meeting]
4. Understand the importance of the development of the APE as a main goal of the PEC and highlight the value of thoughtful self-reflection of program performance.
5. Recognize how a well-done APE can outline a program's strengths/weakness/opportunities and set the "aim" for the upcoming academic year.
6. Understand the long-term importance of maintaining accurate and thorough APE's.
7. Utilize your APE to go above and beyond: assisting with departmental and institutional residency updates, required ADS updates, and as key tool in preparing for the10-year Self Study Visit.

Presentation Outline

I.	Introduction
II.	What we all need to do: ACGME Requirements – CCC, PEC, APE
III.	How we can get there: Executing a Meeting Successfully
IV.	Pearls & Pitfalls along the way: The Do's and Don'ts
V.	Conclusions

Key points:
1. Successful meetings (CCC, PEC & APE) are largely about the *process*
2. Meeting preparation (and follow-up) are equally important to the meeting itself

3. Always establish ground rules at the outset of each academic year (e.g., goals, objectives, restatement of purpose), and at the outset of each individual meeting (e.g., confidentiality, device use)
4. When done well, the PEC & APE can increase your efficiency and augment your approach to fine-tuning and building towards the future
5. Personal conversations can go a long way – build equity, generate consensus, gain buy-in

I.   Introduction - Why is this topic so important?

- General principles
    - A lot of required meetings in our world!
    - CCC & PEC often chaired by non-PD's
    - May be led by relatively junior members of the leadership team
- Types of meetings
    - Those that are required at any level: accreditation (ACGME in our world), institution, departmental, program
    - Solving a problem/soliciting input
    - Making a decision
- Program leadership meetings
    - Importance: solicit input, ensure everyone on the same page, info sharing and dissemination, camaraderie, everyone on team has a seat at the table on recurring basis
- Other meetings
    - Meetings can easily be overdone! find ways to "double-up" to reduce meeting load on everyone – e.g., condense reports of several free-standing meetings into larger program leadership meetings, eliminate unnecessary meetings
    - Advance prep work is key to keep succinct and productive

II. ACGME: CCC, PEC, APE...HELP!

- ACGME required meetings: CCC & PEC
    - CCC - not a focus of this talk
        - Appointed by PD
        - 3 Core faculty minimum
        - Have a charter
        - Substance/deliverables
            - Provide milestone levels for each resident semi-annually
            - Review evaluations
            - Advise PD on
                - Resident progress

- Promotion
- Remediation
- Dismissal
- Report to ACGME online semi-annually
- Pearls:
    - Bedside, real-time evals preferred
    - PD discouraged from being chair
    - No residents allowed
    - Non-physicians encouraged to be on CCC
    - Document discussion well
    - Utilize LMS to help
        - Organize the data for your members ahead of time (use PC to organize data)
        - Fair amount of prep time by CCC members required for success

- PEC
    - Old idea, new name (Education committee, etc.)
    - Appointed by PD
    - 2 teaching faculty minimum
    - 1 resident minimum
    - Have a charter
    - Focus is on evaluating the *program* rather than the individual residents in the program (which is largely a CCC function).
    - Committee can be used to incorporate evaluation of all "education" going on in your department—for some includes fellowship evaluation, clerkship evaluation, etc.
    - Substance/deliverables
        - Planning, developing, implementing, and evaluating educational activities
        - Review and advise on curriculum G&O's
        - Address areas of ACGME non-compliance
        - Review evaluations of rotations, program, and faculty
            Internal surveys
            ACGME Resident/Faculty Surveys
        - Commission the APE and develop action plan and "aims" for APE
            - Develop written action plan and track progress throughout the year
            - Ratified by teaching faculty

- APE
    -Likely the most time consuming and consequential annual goal of the PEC

- *Process* of the APE is hugely important

Purpose of the APE:
- To objectively reflect upon program accomplishments of the past year and opportunities for improvement going forward
- Most valuable to the program when used to evaluate continuous goal setting and metrics for improvement
- Should be so much more than an episodic biopsy
- Functions as a road map for the year ahead

Process of Constructing
- Need to identify the key stakeholders that should be involved
    - PEC alone?
    - Incorporation of all residents/core faculty members?
    - One meeting vs. multiple, staged meetings for feedback gathering
- Identify a timeline and scheduled date of completion that works for your group
- Using institutional or departmental derived outlines including all important areas to annually assess
    Required Areas to be Assessed:
        - Program aims
        - Progress on last year's Plan of Action (POA)
        - Resident Performance
        - Faculty Development
        - Graduate Performance
        - Program Quality
        - Program Performance (Strengths and Threats)
- Literature minimal, but does suggest that use of template is best practice
    - Increases institutional compliance and decreased citations for "evaluation of program"
- APE must be reviewed and approved by teaching faculty

How Does the APE Go Above and Beyond?

- Identifies accomplishments to celebrate and areas for continued opportunity
- Is a nice method of reporting your programs accomplishments to the department as well as on a higher GME level within the institution or system
- Facilitates information gathering and input into the required annual ADS updates
- When done appropriately, should make 10 year self study visits a breeze
    *less stressful for Program Leadership
    *more accurate, reflective, and comprehensive portrayal of your program
    *by completing on an ongoing basis, allows you to remember all the "fine points" that perhaps will get forgotten

III. **Executing a Successful Meeting**

- Have a plan! And, don't just show up at the meeting along with everyone else when you are the Chair
- Preparation for a meeting (including timely/pertinent follow-up after the meeting) is in many ways equally if not more important than the actual meeting itself
    - Why are we meeting? required (ACGME), essential to operations (program leadership or other recurring meetings part of fabric of program functioning), ad hoc (acute issue)
        - Can the goals and objectives be accomplished in an alternative fashion that would be more time and effort efficient? e.g., in planning for a meeting, you may decide the best course of action is no meeting at all
    - Identify the key participants
        - Problem solving/soliciting input → ensure that key stakeholders are present, or at least information is gathered from them in advance
            - Stakeholders
            - Amicus brief concept -- e.g., GME or chair's or off-service rotation coordinator input into issue impacting your trainees
        - Making a decision → is the "decider" present? What type of leg work needs to be performed in advance so decision can actually be reached at the meeting
        - Role of Chiefs/resident input
            - Presence at the meeting vs. input vs. "amicus brief" concept
            - Hybrid model: chiefs present for first portion, faculty-only for latter portion (e.g., remediation issues, CCC follow-up, etc.)
    - Set the agenda, and distribute the agenda in advance of the meeting
            - Consider assigning roles for reports or eventual follow-up in advance -- avoids the issue of everyone looking down at the desk when asked "who would like to take on this task?"
    - Send the invitation
        - Setting/location - convenient, practical
        - Timing - make convenient for all (e.g., conference days, but only if participants won't be too burned out from an already long day)
        - Food: boon (draws people in, helpful for lunch hour) or a bust (can be a distractor, and may influence duration of meetings that are intended to be shorter - e.g., tough to do lunch at a half-hour long meeting)
        - Consider personalized invitations in addition to general email blast – e.g., personal conversation, or personal correspondence
            - Particularly important for first of recurring meeting series – e.g., invite CCC members personally at beginning of each academic year
                - More personal, and allows you to discuss expectations of being a committee member as well and to answer any questions

- Immediate pre-meeting prep
    - Prepare logistics - program coordinator/admin office support often key
    - Distribute agenda
    - Distribute key reading materials
        - Helpful for advance prep to focus meeting agenda
        - Be mindful and respectful of the amount of info/detail that you send out -- not too much, and not too close (e.g., at 7am preceding an 8am meeting!)
- Leading the meeting
    - If you as the committee or meeting chair arrive on time, you are late!
    - Show up early -- important to set the tone, lead by example, troubleshoot any issues
    - Establish ground rules / expectations
        - most important in 2016 = device use
    - Be respectful of everyone's time -- don't "back-up/reverse" or start again when others are late -- instead, offer to fill them in after the meeting
        - less likely to be late next time!
    - Execute the agenda -- keep things moving, ensure that all viewpoints are heard
        - 'round the horn before meeting concludes -- great team-building exercise
    - Close the meeting -- recap, make sure assigned tasks are understood (the communication loop: sender → receiver → sender verifies)
- After the meeting
    - Send a recap/follow-up note
    - Proactively manage post meeting tasks/assignments
    - When you are the committee chair, YOU are ultimately responsible for the committee product -- that includes follow-up and details
    - Always carefully review minutes BEFORE they are sent out to the group

IV. **Meeting Pearls: Do's and Don'ts**

- Never ask a question that you don't want to know the answer to
- Consider "drop-in" role of experts, as opposed to full meeting participation -- manages expectations of the visitor from the outset
    - e.g., faculty mentor for a resident on remediation plan
    - director of GME
    - Off-service rotation reps
    - Perhaps your departmental chairman
- Go around the horn -- make sure everyone has a chance to participate (particularly with smaller meetings -- e.g., fewer than a dozen participants)
- Don't cut off -- rather, re-direct
- Facilitate everyone talking - all opinions expressed
- When everyone looks down at the table when asked who wants to take on the unsavory follow-up task...

- This is where pre-meeting prep pays off
- Alternatively, personalized invitations post meeting could assist in achieving goals
- Pre-vet contentious (or potentially contentious) issues
  - Better to line up info and lean in than wage an intra-meeting war
- Don't be scared of conflict. It helps solve issues
- Dealing with meeting hecklers
  - If all else fails….call for a brief refreshment or restroom break
- Praise publicly; criticize privately
  - Using high EI/EQ (emotional intelligence) is key -- everything you say or do as a leader impacts others -- be mindful of this fact when leading a meeting

V. **Conclusions**

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Tweets

You still think of an APE as a large primate? Let us show you what APE means in the residency leadership world. Come to "Where Did The Year Go? Making Your PEC and APE the absolute best!" on Sunday at 3:15 in the Best Practices Track.

Why should I spend hours and hours of my time on completing one task throughout the year? Find out how the APE will actually make your life easier if done well. Come to "Where Did The Year Go? Making Your PEC and APE the absolute best!" on Sunday at 3:15 in the Best Practices Track.