Office of Continuing Education (OCPE)
Speaker/Presenter Guidance Document

July 2021

The following guidance document contains information for speakers regarding creating your 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.

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CE Activities and Activity Types
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.

ACPE categorizes CE activities into three types:

- **Knowledge**: transmit knowledge (i.e., facts)
  - The minimum amount of credit for knowledge-based activities is 15 minutes or 0.25 contact hours.

- **Application**: apply the information learned
  - The minimum amount of credit for activity-based activities is 60 minutes or one contact hour.

- **Practice**: 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 credit for these activities is 15 contact hours.

The activity type must align with the learning objectives, active learning strategies, and assessments. For instance, an activity that uses a knowledge-based verb (ex. define) should utilize a knowledge-based active learning exercise and a knowledge-based assessment. Speakers will select the activity type during the application process.
Learning Objectives
Key Points: Learning Objectives
- Speakers may submit up to 1 learning objective per 15 minutes of content.
- 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.

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

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.

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 a course/activity is developed (by designer, host)
- Before a course/activity is taught/given (by instructor)
- Objectives should be reviewed with participants at the beginning of the course/module

Steps to Creating Activity Objectives
1. Identify the gap/educational need.
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 activity objectives.
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 in the ‘Active Learning and Assessments’ section (page 6) for more examples of verbs by activity type.
- Be addressed by an active learning activity
- Be covered by a learning assessment.

How Should Learning Objectives be Written?

- Start with the phrase: “At the conclusion of this activity, the learner should be able to:”
- Then state the things learners 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” would not qualify. This should be split into two objectives, “Define patient care” and “Describe the role of pharmacists in patient care”.
- Learning objectives are learner centered. Objectives state what the learner will be able to do at the end of the training; not what the 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 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. Speakers/presenters are encouraged to create thoughtful objectives and to reflect on what learners will take away from the activity.

For more information or additional resources:
Active Learning and Assessments

Key Points: Active Learning and Assessments

- CE activities must contain both active learning and an assessment(s)
- Active learning exercises and assessments should align with the activity type and the action verbs of the learning objectives.
- Speakers should be proactive in planning active learning and assessment strategies; speakers are required to submit the active learning and assessment strategies as part of the CE Activity Application form.
- Learners should receive feedback on correct vs. incorrect responses.

Active learning is an instructional strategy in which the learner engages in exercises within an activity to practice the concepts, skills, knowledge being taught. Active learning helps learners acquire and retain material/concepts more effectively. It also assists in keeping learners’ attention throughout the presentation.

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 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 learners’ 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 learners who achieve this benchmark can receive CE credit. If the successful completion does not include a pass rate, learners are not required to reach a minimum score to receive CE credit).

Learners should receive feedback on the correct vs. incorrect responses for active learning and assessment activities.

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

Active learning exercises and assessments should align with the activity type and the action verbs of the learning objectives. Using Bloom’s Taxonomy levels, ACPE has created suggested learning strategies. See the following table.
<table>
<thead>
<tr>
<th>Activity Type</th>
<th>Verb Examples</th>
<th>Suggested Active Learning</th>
<th>Learning Assessment Examples</th>
</tr>
</thead>
</table>
| Knowledge     | Knowledge-type verbs  
- Define  
- Repeat  
- List  
- Record | Lecture  
Visually  
Examples  
Illustrations  
Analogy | Questions/Recall Facts |
|               | 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 | Case studies/application of principles |
|               | 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
CE Activities must adhere to the following:

- 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 areas 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.

- CE activities should prepare pharmacists to provide patient-centered collaborative care as described in the Pharmacists' Patient Care Process Model.
Presentation Slides and Educational Materials

- **Activity Title and Learning Objectives**
  - The activity title and learning objectives must match how they are written in the ADF (Activity Description Form).
  - The ADF will be sent to the host organization once the application review has been completed. The title and learning objectives in the activity application will be used in the ADF unless otherwise updated by the activity host. Note: for CE activities that contain multiple presentations the title for the full activity must be on the slides as opposed to the presentation title. For example, if you are presenting in a clinical pearls session entitled, “Clinical Pearls in Community Practice”, your title slide must contain this title. Your individual session can be listed as a sub-title.

- **Disclosure Statements**
  - Speakers must include a disclosure statement, either written, verbal, or both.
    - If there are no conflicts of interest or disclosures, a statement similar to the one below can be used: “Dr. <Speaker Name>, has no relevant financial relationship(s) with ineligible companies to disclose.”
  - If there is a necessary disclosure, this will be provided 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.

- **Bias**
  - Slides and educational materials must be free of any undue bias and support from ineligible organizations.
  - 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.

Other Considerations for the CE Activity Application

**Educational Needs Assessment**

Speakers are required to include an educational needs assessment in the activity application. The educational needs assessment should state the potential or actual problem in pharmacy practice or the new product or development that you intend to address in your activity and explain how your activity will bridge the gaps in knowledge or skills in order to best implement solutions to the stated problem or the new development in practice.
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 your slides are as uniform as possible in terms of background, logos, fonts, and colors. Try to avoid looking like you have taken slides from previous presentations. The audience expects that you have prepared the presentation especially for them.
  - Make sure that you are using good contrast to enhance the visibility of your materials.

  ```markdown
  Most consider the best contrast for visibility is a dark (e.g., dark blue) background with a white **or yellow bolded lettering**. If you are using a dark background, do NOT use other colors (**like red or even light blue**). Even though they may be visible to you on your computer screen, they will not be easily visible to your audience on the projection screen.
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  ```markdown
  Another high contrast method is to use a white or pale yellow background with dark lettering. This gives you 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.
  - Some suggest using no more than 3 colors on a text slide.
  - Avoid using red and green to differentiate parts of your slide. This will be a problem for those with a common form of color blindness.

- **Backgrounds & Special Effects**
  - Avoid fancy or detailed slide backgrounds. Although they may look nice, they may cause your slides to become 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 with you in case of any technical issues.
Font selection should include easy-to-read fonts such as Arial or Comic Sans. Members of your audience will like find Times New Roman and Courier difficult to read. Use the same font throughout your presentation.

Font size should be easy to read from the back of the room you are speaking in. Use at least 36-point font for titles and at least 24-point for bullets. Most of the time, the smallest font that can be easily read will be 20 points. It might be reasonable to use this in footers. Make it easy on your audience and chose a font size that is as large as possible.

Font color tips are included above in the section on Contrast.

Remember the 7 x 7 Rule to minimize your chances of reading your slides and keeping them easy to read:
- 7 words per line
- 7 lines per slide

Some suggest a 40-word limit on a slide.

Spell check your slides before you show them to your audience.

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

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

Variety
- Whenever possible, include pictures, tables, and figures to make your point.
- Over-reliance on text slides will make the presentation easier on you (using slides as an outline) but may be annoying and boring to your audience. It can also be distracting if the audience is reading detailed text slides while you are speaking.
- Unless providing a direct quotation, it is preferable to use phrases rather than full sentences on slides.
- If presenting data in tables, leave only essential data in the slide to make your point. Keep it uncluttered and easily readable for your audience.

Back-Ups
- Bring a hard copy of your slides in case of an equipment failure. You may need to speak from these without your slides in the event of technical issues.
- Bring your electronic slides in more than one format. Bring the format suggested by your program’s coordinator as well as at least one other electronic form of your 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.
- While most prefer copies of your slides, they also appreciate having space on which to take notes during your presentation.
- If you were required to make last minute changes to your slides or their order compared to the handouts that your audience has in hand, be sure to point out marked differences so the audience can follow your presentation.
- Other ideas for handouts:
  - Copies of an article that enhances a key point in your presentation.
  - Your learning objectives and post-test self-assessment questions
Presenting Tips

- **Speaking & Keeping in Touch with the Audience**
  - Project your voice from your diaphragm.
  - Speak loud enough that every member of your audience can hear you clearly.
  - Check to be sure that your sound is reaching the back of the room before beginning your presentation.
  - Try to avoid unneeded sounds during your presentation (e.g., “uh,” “um”); it is preferable to be silent than to use sound fillers such as these.
  - If you are getting ready to make an important point, signal the audience to refocus their attention. For example, lowering your voice level can be an effective way to regain close audience attention.
  - Watch for signals from your audience – you may have lost sound, need to clarify a complicated instructional point, or some other problem may be evident.
  - Try to make eye contact with members of your audience throughout your presentation; move your attention to all areas of the audience during your presentation.
  - If you are 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.


