

# 2013-2016 HL7 Education Strategic Initiatives

## INTRODUCTION

### Mission

To assure the development of high quality, highly accessible education programs in multiple formats aligned to the needs of the HL7 community and the healthcare community at large.

### Vision

To position HL7 International as the leading resource for information and education related to HL7 standards.

### Stakeholders

Stakeholders are composed of but not limited to members and others throughout the world having an interest in learning more about HL7 standards.

## STRATEGIC PLAN: 2013 -2016

### Goal #1 – Provide HL7 developers and technologists with robust training to implement all HL7 standards.

**Objective 1:** Develop new education programs focused on areas of identified needs.

#### Action Plan

- Conduct an assessment of needs to identify the gaps between what currently exists and what is needed to address the gaps
- Conduct an inventory of existing education programs that align with HL7 products (the standards)
- Evaluate efficacy of existing education programs using course evaluations and other available, relevant data
- Prioritize needs
- Develop more in-depth training, including workshops, on V2, V3 and CDA series of standards so that participants will know how to implement them.
- Develop training for HL7 Standard for Meaningful Use Stage 2

#### Performance Measures

- Number of existing education programs evaluated and scheduled for updating if necessary by end of first quarter 2013 – expect initial report from Heather by June 2013 on review of tutorial specifications
  - Heather has done initial review. Need to determine next steps to provide feedback to speakers, etc

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- Number of new education topics identified and prioritized by end of second quarter 2013
  - FHIR – eLearning Unit under development
    - Will likely use eLearning unit beyond the HL7 Fundamentals course
    - Action: Diego to send draft matrix to FHIR management group
    - Action: work with FHIR management group through David Hay to help them to identify educational requirements
    - Action: update existing material to include FHIR – this will be updated for DSTU
  - UML
    - May be scheduled for Jan 2014 WGM - done
  - Tooling
    - Project underway to identify tooling educational requirements – need to follow up with Tooling (and others)
  - SAIF – webinar – work with Ron Parker - underway
- Number of new education programs developed and deployed by end of 2013, 2014, 2015
  - 2013 – Webinar series – MU and Certification Skills, Tutorial (Heather), FHIR, SAIF
    - target = 3 programs
  - 2014 – have identified new tracks and webinars – EHRS-FM, HQMF, Glossary Management, Facilitator/Co-Chair Training
    - Target = 3 programs
- Evaluation tracking system in place by Q3 2013
  - Keep existing

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## Goal #2 – Expand the reach of HL7’s training to increase the number of people trained and the number of trainers at our disposal worldwide.

Objective 2a: Develop web-based programs for HL7’s courses as needed

### Action Plan

- Solicit input (survey, focus groups, expert reviews, faculty feedback, program evaluations, etc.) from stakeholders on learning method preferences, ie. F2F, online courses, webinars, self-paced or instructor –facilitated, etc.
- Research, evaluate and recommend learning technologies for current courses
- Develop courses using appropriate learning technologies

### Performance Measures

- Web-delivery methods applied to V2, V3, CDA and each of the components of HL7’s MU series of courses  
**Target** – X # of courses offered via appropriate learning technologies by end of 2013, 2014, 2015
- 2013 – will have V2, V3 and CDA completed and will add MU series
- 2014 – 3 new courses/series will be developed – have been identified
- 2015 – 3 new courses/series will be developed

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**Objective 2b:** Partner with institutions of higher learning to deliver training

**Action Plan**

- Solicit interest from institutions of higher learning with programs in healthcare informatics to become HL7 training partners
- Identify up to 3 institutions as collaborators in the development of course packs
- Develop course packs for distribution to institutions of higher learning

**Performance Measures**

- Partnerships established with institutions of higher learning  
**Target** – 2 institutions of higher learning established by EO 2013, 2014, 2015  
2013 – in progress – have 2 now – IVY Tech in Indiana (ongoing discussions) and Marquette University (ongoing discussions)
- Course packs developed and marketed to institutions of higher learning with bioinformatics programs  
**Target** – X number of course packs sold to institutions of higher learning offering healthcare informatics programs by EO 2013, 2014, 2015  
2013 – not likely to have any  
2014 – develop at least 1 – need to begin to plan this  
2015 – deploy at least 1

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**Objective 2c:** Partner with companies to deliver training

**Action Plan**

- Define benefits of partnering with HL7 to deliver training
- Solicit companies interested in delivering HL7 training
- Provide training materials for new standards for companies to use
- Offer “preferred partner” status for companies using HL7 materials who have met our training standards
- Define criteria and process for achieving “preferred partner” status
- List “Preferred Trainer” companies on HL7 website
- Evaluate potential of licensing training materials for distribution to “preferred trainers”

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**Performance Measures**

- Partnerships established with training companies  
**Target** – X # of partnerships established by EO 2013, 2014, 2015
- Criteria and process for becoming “Preferred trainer” in place by EO 2013
- “Preferred trainer” credential offered  
**Target** – X # of “Preferred trainers” authorized by EO 2014, 2015  
need to do some brainstorming on what this is and what it means  
Begin to work on this in 2014

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**Goal #3 – Expand Certification Program worldwide**

**Objective 3a:** Offer online training certification worldwide

**Action Plan**

- Research, evaluate and recommend best method for delivering certification exams online
- Consider testing services with international reach as well as delivery through Moodle LMS
- Evaluate current language and contextual references in certification exams for an international audience

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**Performance Measures**

- Method for delivering online certification recommended and approved by end of Q1 2013
  - Done
  - Issue: Needs to consider the impact to the affiliates – discount for affiliate members; commission for affiliate; instrumentation – Update to affiliate agreement has been proposed for January 2014
- Online certification offered beginning January 2014
  - July 2013 - complete
- Certify a minimum of XXX people by 2014
  - 30 people – we will meet this by end of September 2013 WGM
- Create a 3 year plan item for the language/context work by December 2013
- Review exam results by December 2014 to identify questions that participants with English as a second language have difficulty in answer as a starting point for updates
- Develop a plan to revising certification exams to conform to certification best practices – Target EO 2014

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**Objective 3b:** Offer different types of certification that measure different sets of competencies

**Action Plan**

- Research and recommend classes of certification
- Certify specialists in V2, CDA, RIM
- Identify skill sets and create blueprint of competencies for each approved class of certification
- Develop certification exams for each new specialty identified
- Support international certification with HL7 online resources
- Deliver certification online for each class of certification

**Performance Measures**

- Blueprint of competencies created for each class of certification
- Certification exams launched for each new class of certification
- **Target** – each identified specialist certification launched online by Y1, Y2, Y3
- Need HL7 HQ support – maybe Australia leadership, Target 2014 or 2015 for this

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**Goal #4 – Expand training for non-technical and clinical audiences**

**Objective 4a:** Develop curriculum and recruit tutors for non-technical and clinical audiences on HL7 standards

**Action Plan**

- Conduct a needs assessment using current stakeholders to identify non-technical and clinical audiences including but not limited to caregivers and payers
- Outline curriculum in collaboration with relevant organizations, such as American Medical Informatics Association (AMIA), for each audience
- Research best media and methods to deliver education program for each audience
- Prioritize and develop education program for each audience

**Performance Measures**

- Priority 1 audience education program launched.  
**Target:** Offer 1 pilot education program to a small number of participants by EO 2014.

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**Goal #5 – Promote effective teaching and enhanced learning for trainers of HL7 Standards**

**Objective 5a:** Train for high impact practices

**Action Plan:**

- Offer workshops/programs on using F2F, online and hybrid teaching strategies
- Develop and encourage participation in instructor learning communities (communities of practice (CoPs)
- Develop a mentoring program
- Create an orientation program for new instructors
- Create a train-the-trainer program
- Recognize excellence in teaching with awards at Annual Meeting
- Create online resource library of best practices for teaching and learning
- Ensure all courses have up-to-date training plan
- Review all training plans for consistency in outcomes, content and delivery

**Performance Measures**

- Number of workshops offered on best practices for training F2F, online and hybrid methods  
**Target:** Workshop held at 28<sup>th</sup> Annual Plenary Meeting (September 2014)
- Formation of Community of Practice for Trainers  
**Target:** Community of Practice communication strategy set up on website after 28<sup>th</sup> Annual Plenary Meeting
- Awards for teaching excellence presented at 29<sup>th</sup> Annual Plenary Meeting
- Online library of best practice resources created in collaboration with the CoP  
**Target:** Portal set up for trainers on website hosting resources and CoP – started. Need to update and include more resources. Consider using Education Lunch to deliver some training. Online material – use Tutor training material from Fundamentals Course.
- **Quality criteria developed to evaluate effectiveness of training outcomes, content and delivery – initial draft of Heather’s review June 2013 – now September 2013**

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- Need to develop next steps and how to provide feedback to tutorial speakers and required remediation

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## Goal #6 – Increase revenue from educational offerings

**Objective 6a:** Leverage education and certification programs to generate additional revenue for the organization.

**Action Plan:**

- Conduct an environmental scan of the going rate for similar training and materials
- Review education offerings and recommend fee structure based on business case
- Identify opportunities to create enduring materials from live presentations and tutorials given at HL7 events and offer them online for a fee.

**Performance Measures:**

- By 2014 education programs are generating X \$ in revenue
- By 2015 education programs are generating X \$ in revenue
- Live education programs are offered online as enduring materials for a fee by Q3 2013

### Addendum

## Education Work Group SWOT

Last update date: May 30, 2012

### Strengths

- Good communication between co-chairs and with staff
- Excellent staff support
- Access to practicing subject matter experts in all areas of HL7
- Improved access to industry through the Marketing Council to identify role-based needs
- Initial draft of a faculty development program
- Moving to a competency based tutorial description system
- Commitment to mission statement and core principles
  - Goal to make student more effective
  - Keep program financially viable
  - Monitor student feedback and respond

### Weaknesses

#### Lack of follow through on projects

- New certification programs progressing slowly

- Clear statements of competencies are lacking
- Capacity of faculty to teach
- Certification currently available may be misleading to industry
- Curriculum Development
  - Consideration of how to tailor tutorials to role-based training (e.g. what do I need to know as a PM, business, technical analysts, clinicians/users, etc.)
- Tracking of educational offerings and outcome
- Strategic Plan not approved

#### Constraints on resources

- Conflicting schedules of faculty who are also resources to their committee(s)
- Limitations on available tutorial rooms at WGMs (3-5 rooms) – room cost vs. revenue opportunity

#### Opportunities

- The ability to expand education worldwide through our affiliates and associate organization agreements
  - Offering educational materials and processes to affiliates
  - Offering and encouraging national offerings of HL7 eLearning Course and Certifications
- Ability to use electronic communication to reach an untapped portion of our audience (e.g., people who can't travel because of budget issues)
  - Flash tours
  - Webinars
- Collaboration with other HL7 activities (e.g., marketing; implementation – to offer education on DSTUs, emerging standards and core principles)
- Collaboration with other organizations' educational activities
  - NPOs / SDOs (e.g., WEDI; TEPR; NCPDP; X.12; HIMSS; Canada Health Infoway)
  - Commercial enterprises (e.g., Corepoint)
  - Education Providers
- Ability to offer continuing education credits
- More involvement with other WGs that result in the identification of new topics to be covered in tutorials
- Identification of new topics emerging in Affiliates, Governments and Industry
- Offer more complimentary tutorials to first time attendees to encourage their ongoing engagement and involvement in HL7.
- Continue aligning education efforts with Marketing WG to ensure different initiatives are identified and coordinated.
- Opportunities for engagement/involvement with younger demographic
- Opportunity for younger demographic to become standards experts
- Increased attention and focus as a result of the onboarding of a dedicated staff resource for Education

## Threats

- Possible Dilution of HL7 education offerings through too many delivery mechanisms (investigate further delivery mechanisms and preferences by students)
- Strained resources: tutors often actively participate in the development of standards in addition to having day jobs. (active engagement with education providers to share responsibilities/opportunities)
- Diminishing resource commitment
  - Company travel policies in reaction to economics
  - Fewer skilled / willing presenters of certain topic areas
  - Aging participants
  
- Diminishing audiences
  - Economic conditions
  - Relevance of educational program
  - Gaps in outreach
- Lack of understanding of the value proposition for HL7
- Perception that standards are difficult and that someone else is “doing them”
- Rapidly changing organization, methodology and portfolio of products
- Language barriers
  - Affiliates must absorb the costs of translations
  - Certification only available in English