



## 2023 Impact Report

- *Adapting*
- *Evolving*
- *Moving Forward*

# LETTER FROM THE CEO



2023 was a momentous year in many respects, not least of which was the official end of the COVID 19 pandemic in May. That crisis may be over, but the changes it wrought continue to be felt throughout the world, including in the work we do at CPEP.

Prior to the pandemic, our staff came to the office every day, and our programs required prolonged, face-to-face contact. Today, the majority of our programs are run remotely, and our Colorado-based team meets in the office twice a month. What has ***not changed*** is our steadfast commitment to helping healthcare professionals fulfill their calling to the best of their abilities, serving the communities that need them.

As CPEP's CEO, I'm proud of the work we do and continually amazed at the hard work and creativity of our staff, particularly in the face of constant, rapid change. In the past year, our Assessment Team launched our Streamlined Reentry Program, providing qualified clinicians with a smoother path to demonstrating competence and honing their skills as they seek to regain licensure or privileges. At the same time, the CPEP Preceptor Pathway for Re-Eligibility in General Pediatrics really took off, we inked a robotic surgery simulation collaboration with a major academic medical center, and signed sole-source assessment contracts with multiple large health systems.

While the Assessment Team was busy, our Seminars Team experience three times higher participation than in 2013, due to growth in legacy programs (professional ethics and boundaries, medical record keeping) and the birth of new programs that did not even exist in 2013 (communications and prescribing).

Our communications seminars launched two new innovations in 2023. Supported by a generous grant from the Kettering Family Foundation, our Improving Inter-Professional Communication (IIPC) faculty, along with our Operations Team, introduced a new online Learning Management System that helps reduce Zoom fatigue for participants while enhancing accountability and maximizing time for discussion and faculty/participant interaction during the seminar.

Our Enhanced Patient Communications (EPC) faculty have taken a different but imaginative approach to reducing Zoom fatigue while enhancing educational effectiveness. Instead of an evening session followed by an 8-hour session the following day, this seminar now consists of two 4.5-hour sessions scheduled for two successive Wednesday afternoons. Splitting it up in this fashion reduces fatigue and allows participants to take the lessons learned in the first session and immediately apply them in their own practice.

***"This is probably the most effective element...You have time to actually practice what you learned the week before."***

Comments from EPC participants regarding "split sessions"

Constant improvement and innovation are part of CPEP's DNA, but we could not pull it off without support from our donors and grantors. We are exceptionally grateful for all your support!

Elizabeth J. Korinek, M.P.H.  
Chief Executive Officer



## 2023 BY THE NUMBERS

**765**

Total Participants

**>300**

Consultants & Faculty

**254**

Referring Organizations

**89**

Professions & Specialties

**66**

*Amazing Donors!*

**49**


U.S. States

**14**

Staff Members

**9**

Canadian Provinces



2023 was the third  
busiest year in  
CPEP's history!



# CLINICAL SKILLS ASSESSMENTS

Throughout 2023, 85 clinicians from 26 specialties relied upon CPEP to help them demonstrate competence and begin a pathway to improving their clinical skills. These assessments included:

- **Clinical Competence Assessments:** addressing acute clinician performance concerns raised by health systems, regulators and others (with performance issues growing more complex and challenging over the past several years)
- **Reentry to Clinical Practice Plans:** helping clinicians safely resume practice after an extended voluntary absence
- **ABMS Re-Eligibility Programs:** helping valued members of the medical community stay in the field by helping them regain board eligibility
- **Late Career and Privileging Screens:** Aiding credentialing bodies in confirming the skills of both new and veteran team members

Key accomplishments by the CPEP Assessment Team include:

- A collaboration with a major academic medical center to assess robotic surgery skills
- The launch of our Streamlined Reentry Program, easing the pathway back to practice for qualified participants
- Sole source assessment contracts with multiple major health systems
- Collaborated with Denver Health to provide assessment services for International Medical Graduates as part of the Colorado Works for International Physicians Program

## Enrollment Trends

Assessment referrals declined through 2022 and for the first two quarters of 2023, but rebounded sharply through the third and fourth quarters of 2023.



## Post-Assessment Education/Development Plans

As a result of a clinical skills assessment, many participants engage with CPEP to pursue a structured learning plan that addresses identified educational needs. Throughout 2023, the Education Team made a number of significant enhancements to the program:

- **Added more communication and “touch points”** (phone calls and video conferences) for participants in the beginning stages of their plan to more clearly define expectations and processes
- **Created new tracking tools** that allow staff to manage participant progress in a more effective, timely manner
- **Provided a more transparent process** for participants and preceptors so they always know their status within the plan - which goals have been achieved and which ones still need to be tackled



## Practice Monitoring

CPEP’s Practice Monitoring Program (PMP) serves as the eyes and ears of regulators and credentialing bodies through remote retrospective reviews of selected patient charts that determine whether or not a participant’s practice meets generally accepted standards care. Benefits of PMP include

- **Patient protection:** PMP helps the referring organization fulfill their obligation to protect the public by confirming the participant’s care meets acceptable standards of practice
- **Fairness and credibility:** CPEP and its reviewers are free of bias, ensuring fairness to the participant and credibility to the referring organization
- **Easy to understand, consistent reporting**

### New in 2023

In 2023, the PMP Team enriched the value of the program to participants by adding specific recommendations for improvement in care and documentation and by offering quarterly coaching sessions for participants.

# CPEP SEMINAR OVERVIEW

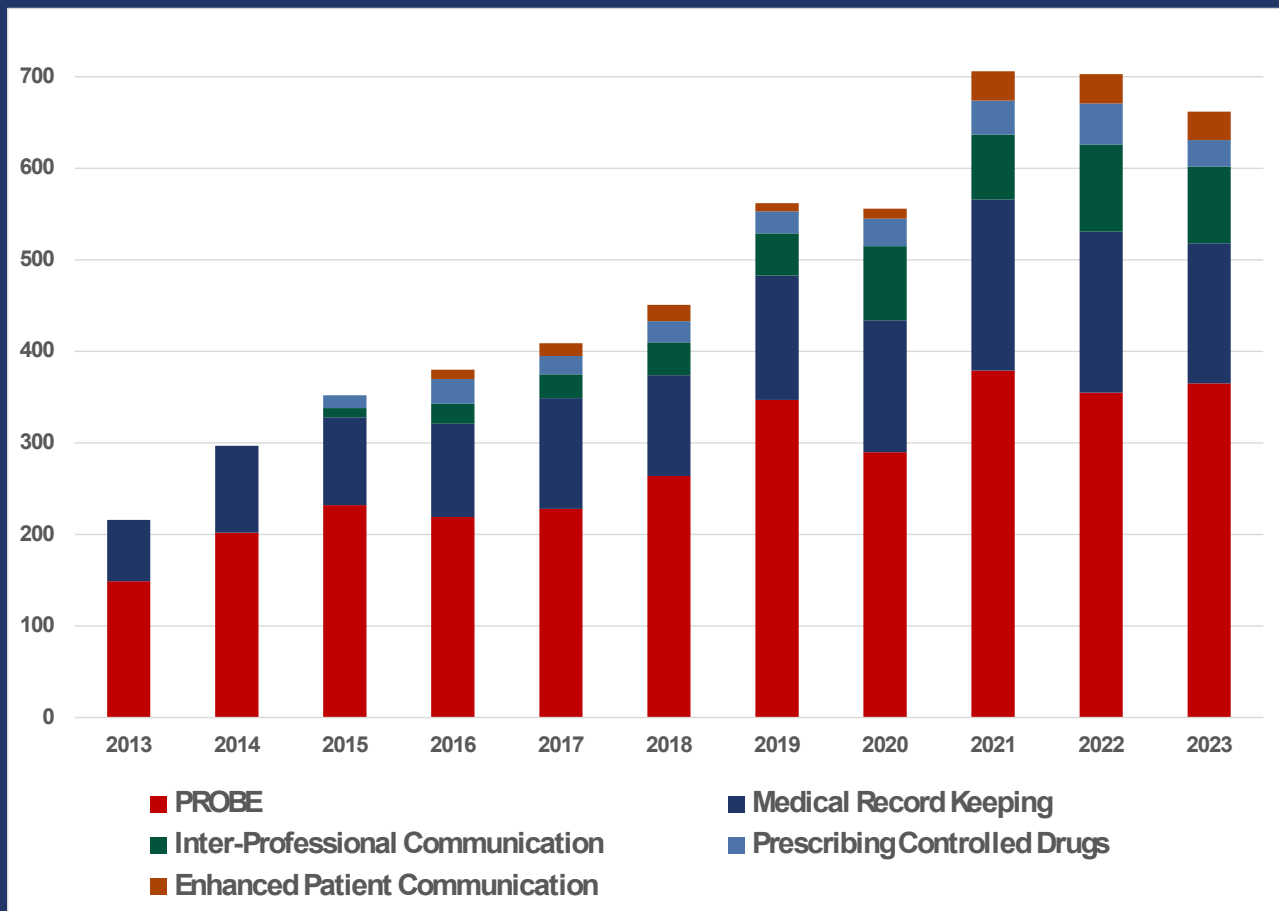
CPEP has been a leading provider of intensive, professionalism-related seminars and interventions since 1993. CPEP seminars all share a number of common traits and values:

- Small-group settings with high faculty/participant ratios
- High levels of engagement, inter-activity, and accountability
- Held remotely via Zoom

CPEP seminars are forward-looking and developmental, not judgemental or punitive. Since 2013, annual participation has more than tripled, and over 650 healthcare professionals from across North America benefited from the CPEP approach in 2023 alone.

In 2023, CPEP launched a new Learning Management System for our Improving Inter-Professional Communication seminar, reducing Zoom fatigue for participants while enhancing accountability and maximizing time for discussion and faculty/participant interaction during the seminar. CPEP expects to expand this approach to other programs over the next few years.

## CPEP Seminar Participation: 2013 - 2023



# THE REMOTE APPROACH

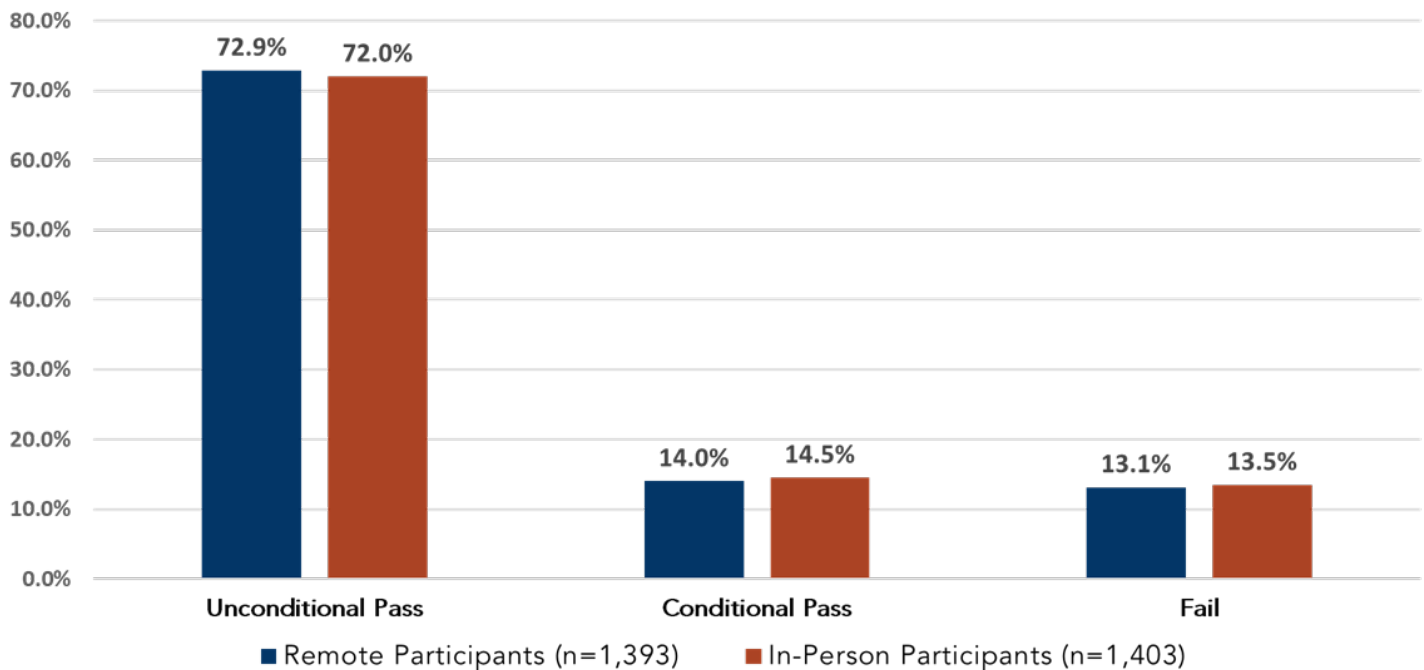
## A RETROSPECTIVE STUDY

The *PROBE* Program is CPEP's intensive, non-adversarial seminar/intervention designed to address gaps in professionalism, including boundaries violations, financial impropriety, misrepresentation, and other ethical lapses. In 2023 there were 27 sessions split between Canadian and U.S. participants.

All participants receive one of three grades or outcomes upon completion of the program: **Unconditional Pass**, **Conditional Pass**, or **Fail**. The grade, or outcome, reflects the ability of each participant to apply the ethical principles they learned in the seminar to their own situation and to demonstrate an understanding of why regulators and other referring organizations have legitimate interests in the conduct for which they were sanctioned.

Prior to the COVID pandemic, all *PROBE* sessions were held in-person in various cities across the United States and Canada. For public health reasons, all *PROBE* sessions transitioned to remote participation via Zoom during the pandemic and CPEP has continued to offer the program remotely.

### *PROBE* Outcomes: Remote vs In-Person Participation



#### Key Take Away

Healthcare professionals who participated in *PROBE* remotely had outcomes that were essentially identical to the outcomes for participants who engaged in-person, validating the remote approach.



## CPEP SEMINARS

### Medical Record Keeping Seminar and Personalized Implementation Program (PIP)

CPEP's one-day Medical Record Keeping Seminar and the six-month PIP follow-up program offer practical tips and solutions to common documentation problems.

In an anonymous survey, 80% of respondents reported an improvement in their documentation skills, two-thirds reported improved timeliness, and more than half of those who reported documentation-related anxiety indicated that participation in the CPEP program had eased that anxiety to some degree.

*"It opened my eyes to how the medical record is viewed - what it reveals about the care I provided."*



### Prescribing Controlled Drugs

While this course\* covers the nuts and bolts of proper prescribing, it does so much more than that. The three-day program helps participants gain perspective on their own motivations during difficult patient interactions and provides them with techniques to identify and manage encounters with drug-seeking patients.

*"I feel much more confident regarding prescribing medications. I now have the tools to help me set boundaries and the confidence to enforce them."*

*\* Made available through a collaboration with the Vanderbilt Center for Professional Health*



# PROFESSIONAL COMMUNICATION



## Improving Inter-Professional Communication

Developed at the request of leading health systems, this seminar gives participants insight into their own communication style and how that style impacts other members of the medical team, and ultimately patient safety. Participants learn how to better manage their response to stressful situations and rebuild damaged relationships.

*"Will change my professional life, so many great teaching points and insights"*

*"I like how we learn from the other participants and their stories!"*

## Enhanced Patient Communication

Some clinicians have an excellent rapport with colleagues and staff but find displays of empathy, active listening, or delivering bad news to patients more of a challenge. This highly interactive seminar, including work with standardized patients, provides strategies that can be immediately put into daily practice.

Offered on two successive Wednesdays, participants can immediately apply what they've learned and then fine-tune their new skills in the second session.

*"The Instructors were SUPERB. The Break-Out sessions were very informative and meaningful."*



All CPEP seminars have optional follow-up programs that help reinforce the skills participants gain from the seminars





## Quick Thoughts on CPEP Funding

CPEP is an independent 501(c)(3) and does not receive any funding from licensure fees or from any other government source. To cover the costs of our programs, we charge fees for the services we provide. As a mission-driven non-profit we try very hard to keep those fees as low as possible. As a result, CPEP is extremely grateful for the support we receive from both institutions and individuals.

## A Special Note of Thanks

CPEP’s Board and Staff would like to acknowledge the generous, ongoing support of the Kettering Family Foundation for our work.

## RESULTS OF THE 2023 PHYSICIAN EXCELLENCE CAMPAIGN

### Premier Donors: \$10,000 and Above

Centura Health, <i>System</i> St. Joseph Hospital, <i>Administration &amp; Medical Staff</i>	St. Mary’s Medical Center, <i>Administration &amp; Medical Staff</i> UCHealth, <i>System Medical Staff</i>
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## \$5,000 - \$9,999

Banner Health Western Region, <i>Medical Staff</i>	Mercy Regional Medical Center, <i>Medical Staff</i>
Children's Hospital Colorado, <i>Medical Staff</i>	Peaks Region Medical Group, <i>Medical Staff</i>
Colorado Medical Society	
COPIC	Rose Medical Center, <i>Medical Staff</i>
Good Samaritan Medical Center, <i>Administration &amp; Medical Staff</i>	Sky Ridge Medical Center, <i>Medical Staff</i>
HealthONE, <i>System</i>	St. Anthony Hospital North, <i>Medical Staff</i>
Lutheran Medical Center, <i>Medical Staff</i>	
Medical Center of Aurora, <i>Medical Staff</i>	

## \$2,500 - \$4,999

Atrium Wake Forest Baptist, <i>Administration &amp; Medical Staff</i>	Presbyterian/St. Luke's Medical Center, <i>Administration &amp; Medical Staff</i>
CU Medicine	St. Anthony Hospital, <i>Medical Staff</i>
Denver Health Medical Center, <i>Medical Staff</i>	Swedish Medical Center, <i>Medical Staff</i>

## \$1,000 - \$2,499

Arkansas Valley Medical Center, <i>Administration &amp; Medical Staff</i>	North Suburban Medical Center, <i>Medical Staff</i>
Boulder Community Health, <i>Medical Staff</i>	Parkview Medical Center, <i>Medical Staff</i>
Longmont United Hospital, <i>Medical Staff</i>	Penrose St. Francis Health Systems, <i>Medical Staff</i>
Conejos County Hospital, <i>Administration &amp; Medical Staff</i>	San Luis Valley Medical Center, <i>Administration &amp; Medical Staff</i>
CURI	St. Mary-Corwin Medical Center, <i>Medical Staff</i>
Montrose Memorial Health, <i>Administration &amp; Medical Staff</i>	

## <\$1,000

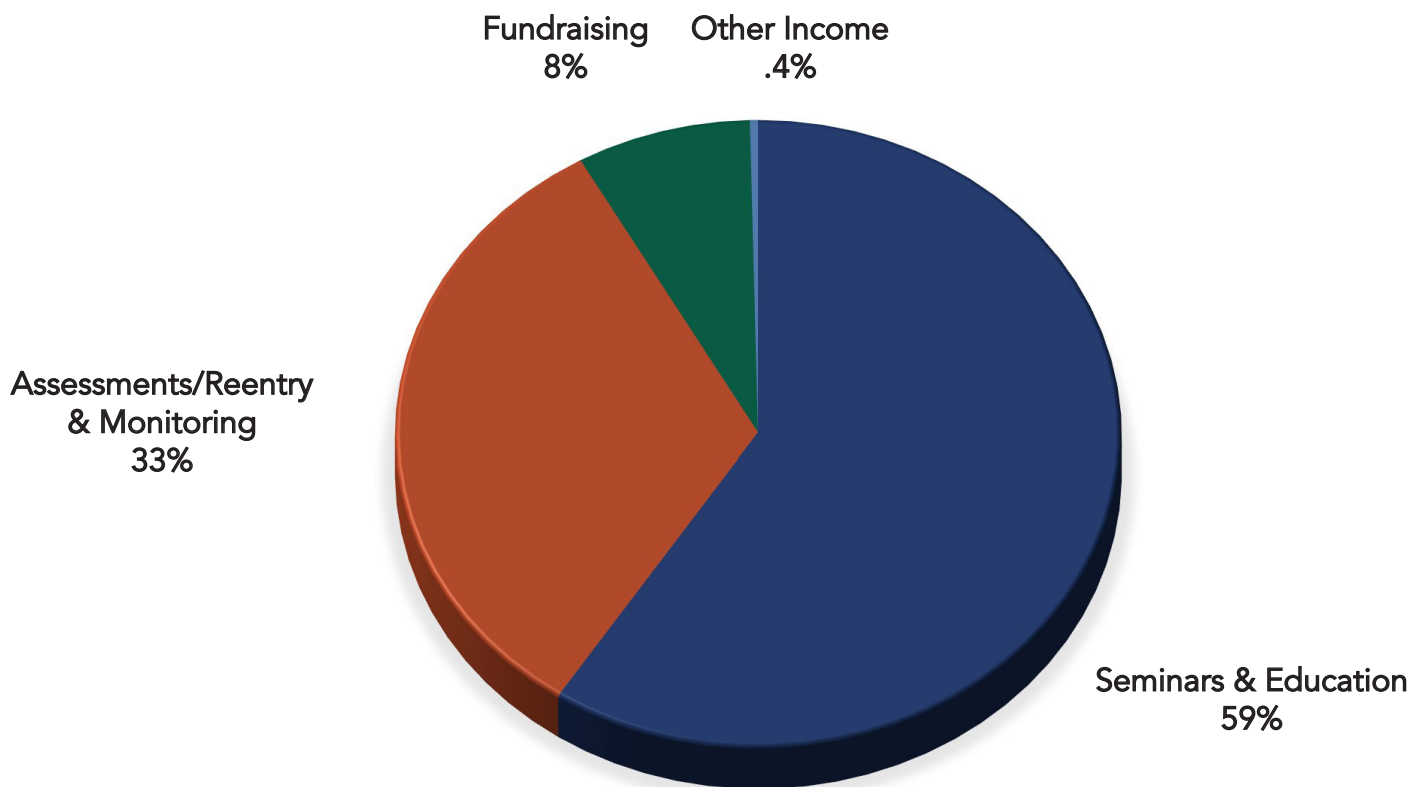
East Morgan County Hospital, <i>Medical Staff</i> Edge-u-Cate Estes Park Health, <i>Medical Staff</i> Platte Valley Medical Center, <i>Medical Staff</i>	Sterling Regional Medical Center, <i>Medical Staff</i> Valley View Hospital, <i>Medical Staff</i> Yuma District Hospital and Clinics, <i>Administration</i>
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## Individual Donors

Alexis Angell, J.D. Christopher Awtry, M.D., M.H.C.D.S., M.B.A. Diana Breyer, M.D. Greg D'Argonne Brian Davidson, M.D., M.B.A., C.P.E. Susan Diaz, C.P.C.S., C.P.M.S.M. Tarshia Donnell Shawn Dufford, M.D., M.B.A. Sean Gelsey, M.B.A.	Shauna Gulley, M.D., M.B.A. Carmello Hernandez, M.D. Russell Howerton, M.D. Lisa Kettering, M.D. Elizabeth Korinek, M.P.H. Katie Richardson, M.D. Philip Stahel, M.D. Andrew Weinfeld, M.D., M.B.A. Frank Xavier
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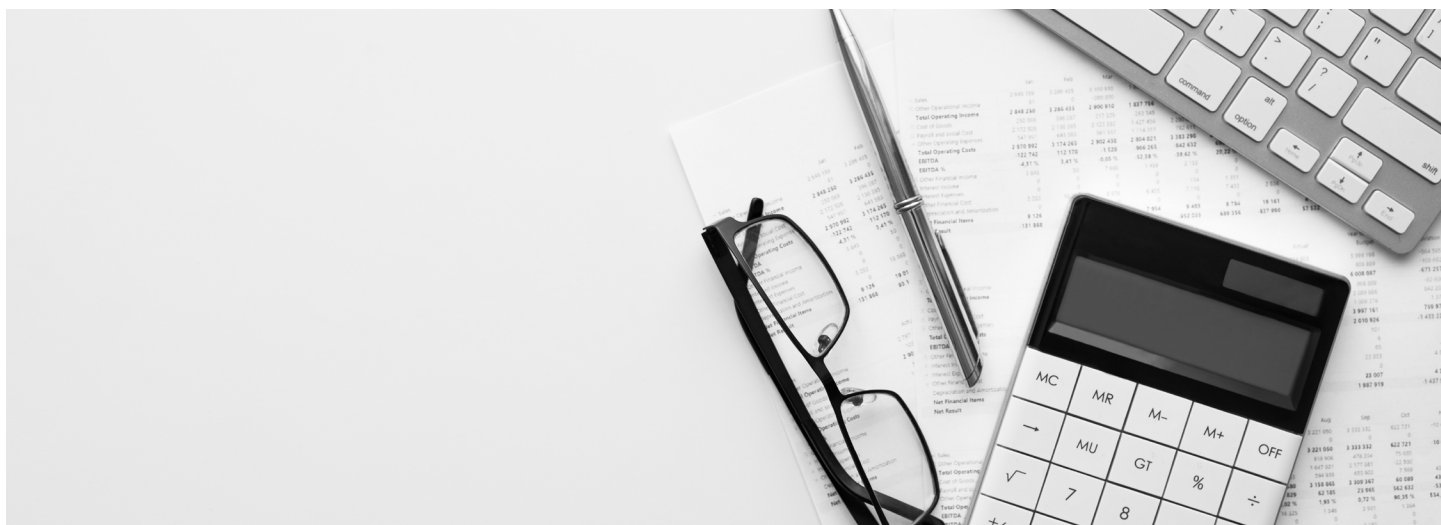


# FINANCIAL OVERVIEW



## Balance Sheet Summary

Assets	\$2,207,792
Liabilities	\$624,777
Equity	\$1,583,015



IT TAKES A TEAM...

TALENTS LEADERSHIP POSITIVE PARTNERSHIP  
CREATIVE **VISION** INNOVATION GROWTH  
SOLUTION **MISSION** QUALITY POSITIVE  
EDUCATIONAL **VALUES** HONEST RESPECTFUL  
OPPORTUNITIES **TEAM** COMPLIANCE  
GROWTH **INTEGRITY** TEAMWORK  
COOPERATION

CPEP'S 2023 BOARD OF  
DIRECTORS AND CURRENT STAFF

# 2023 BOARD OF DIRECTORS

## 2023 Board Officers

Shawn Dufford, M.D., M.B.A.  
Chief Medical Officer  
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Intermountain Health

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Chief Medical Officer Northern Region  
UCHealth

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New York Presbyterian Hospital System

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San Luis Valley Regional Medical Center

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Atrium Wake Forest Health

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LINC MD, PLLC

Philip Stahel, M.D.  
Chief Medical Officer  
HCA Healthcare North Carolina Division

Andrew Weinfeld, M.D., M.B.A.  
Chief Medical Officer  
Rose Medical Center

## CURRENT STAFF

### Executive Leadership

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Chief Executive Officer

Elizabeth S. Grace, M.D.  
Medical Director

### Program Services

Alisa Johnson, M.S.H.S.A.  
Director

### Assessment Services

Amanda Bessmanoff  
Recruitment/Outreach Specialist

Barclay Taylor  
Assistant Manager

# CURRENT STAFF

## Education Plan Services

Toni Leonard  
Manager

Dan Shamburek, M.D.  
Associate Medical Director

Summer West, M.P.H.  
Program Coordinator

## Seminars

Britt Johnson-Schenk, Ph.D., J.D.  
*PROBE* Program Manager

Kelley Blaine  
Seminars Coordinator

Mary Minobe  
Program Services Liaison

## Operations & Finance

Frank Xavier  
Director

Nancy Melear  
Operations Coordinator

## Outreach and Communications/East Coast Operations

Bill O'Neill, M.B.A.  
Director



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