QUALITY STANDARDS FOR CONTINUING EDUCATION
DEVELOPING A LIVE PROGRAM

In 2013 the Board of Directors endorsed a Resolution on Continuing Education kicking off a multi-year initiative to ensure CFP® professionals have access to a variety of quality continuing education (CE) opportunities that are diverse in their content and format delivery. In response, the Council on Education designed a CE Quality Assurance Initiative implemented in 2015. The recommendations below incorporate the standards and best practices of the Quality Assurance Initiative to promote learning.

QUALITY STANDARDS OF DELIVERY

A well-designed Live program will meet these baseline standards:

▶ Program policy is defined and includes how:
- o   CE hours are determined (based on CFP Board guidelines)
- o   Attendance will be determined, including any expectations for participation (address question of partial credit)
- o   CE hours will be reported (based on CFP Board guidelines)

▶ Program is well-defined through:
- o   A short description that, in 2-3 sentences, meaningfully describes what is to be covered
- o   Learning Objectives that clearly define the intended outcomes as a result of the presentation (typically no more than three objectives for a 60-90-minute presentation)
- o   A stated level of complexity: overview (entry level/introductory), intermediate (assumes base knowledge/previous exposure to the topic), or advanced (assumes detailed knowledge/extended exposure to the topic)
- o   An identified target audience based on necessary background and relevant experience

▶ Program content is:
- o   Developed by Subject Matter Expert(s) recognized as a domain expert and person of authority on the topic
- o   Objective in its delivery; free from sales or product pitches
- o   Proper in citation of facts, data, quotes, paraphrasing and supplemental information
- o   Able to stand up to peer review and fact checking
- o   Presented in a professional manner
- o   Aligned with a specific level of complexity and identified audience

▶ Program delivery is:
- o   Consistently designed and structured
- o   Interactive to promote learning and concept retention
- o   Includes "real" case studies applied in diverse settings and representing real life client situations
- o   Provides resources the participant can use as a reference guide in the field

▶ Upon completion of a program, provide:
- Summary of the Learning Objectives and key points related to each objective
- Program evaluation to collect meaningful participant feedback
- Certificate of Attendance that includes
  - Sponsor name
  - Program title
  - Participant name
  - Date of attendance
  - CE earned

STRUCTURING A LIVE PROGRAM

Presentations for Live Programs should follow this format to ensure an organized delivery of content:

1. Presenter introduction - enforcing Subject-Matter-Expert status
   a. Credentials
   b. Current position and employer
   c. Short bio (2-3 sentences)
2. Clear display and articulation of the Learning Objectives
3. Present content in an orderly fashion and in a way that promotes learning
   a. Ensure each slide has no more than 3 to 5 bullet points or facts
   b. Use images, diagrams, stories to drive home a point or illustrate a concept
   c. When transitioning concepts or topic, tie back to the learning objectives
   d. Introduce activities and case studies that demonstrate use patterns and concept application
   e. Provide attendees with reference material and relevant content resources
   f. Conduct regular audience "check-ins" – continuously try to measure engagement and retention
   g. Summarize key points before moving on to next learning objective or content section
4. Leave time for:
   a. Questions & Answers
      - Repeat the question asked before providing response to ensure it was heard by all and correctly heard by the presenter
      - Reference back to a bullet point in the presentation; use an example to reinforce your response
   b. Review of the key points and tie back to the learning objectives
   c. Completion of the program evaluation
   d. Reminding participants of processes for:
      - Signing In (and Out if applicable)
      - Reporting of CE hours
      - Distribution of Certificates of Attendance

Submit your programs to CFP Board in your CE Sponsor account.
Questions? Email cesponsor@cfpboard.org