QUALITY STANDARDS FOR CONTINUING EDUCATION
DEVELOPING A SELF-STUDY COURSE

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 online course will meet these baseline standards:

▶ Course is well-defined through:
- A short description that, in 2-3 sentences, meaningfully describes what is to be covered
- Learning Objectives that clearly define the intended outcomes as a result of the presentation (typically no more than three objectives for 60-90-minutes of content)
- 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)
- An identified target audience based on necessary background and relevant experience

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

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

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

STRUCTURING A SELF-STUDY COURSE

CFP Board recognizes that each Learning Management System has its unique attributes. The guidelines set forth here are general in nature but reflect what we feel are components of a well-designed course.

1. Navigable Table of Contents
2. General Course Requirements
   a. What to expect
   b. When final assessment can be accessed (strongly recommend a Forced Progression setting)
   c. How to take the final assessment
   d. Requirements for successful completion
   e. Timeframe for completing the course (how long does the student have access to the course)
   f. How to complete the course evaluation
   g. How to access the Certificate of Completion
   h. How CE hours will be reported
3. Course Introduction
   a. Description, Learning Objectives, Level of Complexity
   b. About the Author
      i. Credentials
      ii. Short bio (2-3 sentences)
   c. Date of last update/refresh or review of course content
   d. Access to reference material or relevant content resources
4. Chapter/Module
   a. Introduction to chapter/module; tie back to one or more Learning Objectives
   b. Ensure a page/screen has no more than 3 to 5 bullet points or facts
   c. Use images, diagrams and/or stories to drive home a point or illustrate a concept
   d. Introduce activities and case studies that demonstrate use patterns and concept application
      i. Build in interactive exercises and/or pop-up quizzes
      ii. Continuously try to measure engagement and content retention
   e. Summarize key points before moving on to next chapter/module
5. Assessment
   a. Forced progression through the course before access to the final assessment is strongly encouraged
   b. Guidelines for the Assessment
      i. Minimum of 5 questions per CE hour offered
         (1) Questions should measure knowledge related to the learning objectives
         (2) Recommend a data bank to include at least 15 questions per CE hour
         (3) No True/False questions (CFP Board does not accept True/False questions in assessments)

  ii. Grade 70% or higher

    (1) Correct and incorrect responses; explanation of correct response can be provided

  iii. Grade less than 70%

    (1) Limit same-day retakes to two; require review course materials

    (2) If correct and incorrect responses are displayed, correct response should not be given for questions answered incorrectly

    (3) Ensure random arrangement and selection of assessment questions (CFP Board discourages static assessments)

6. Successful Completion of the course

  a. Participant should be directed to a short course evaluation

  b. Certificate of Completion should be available for download

  c. Resource materials (if applicable) should be available for download

Submit your programs to CFP Board for CE.

Go to www.CFP.net/cesponsors for more information on becoming a CE Sponsor.

Questions? Email cesponsor@cfpboard.org