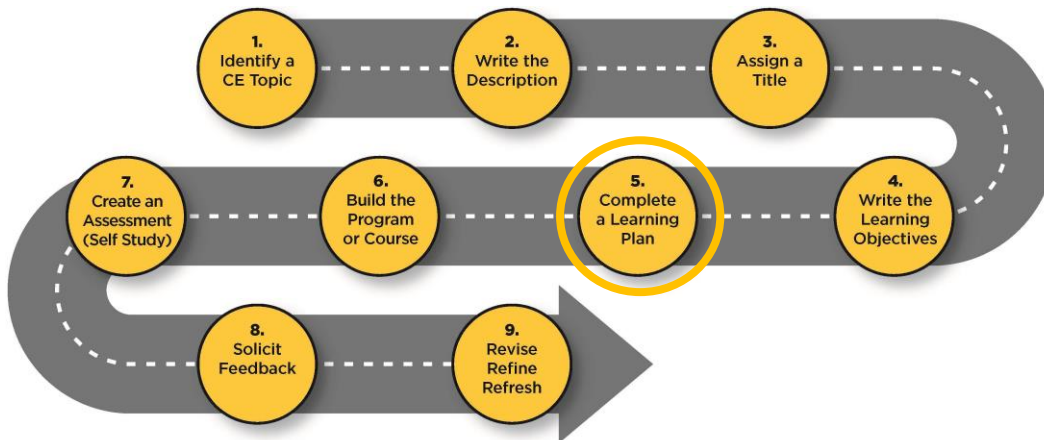


GUIDANCE DOCUMENT: DEVELOPING A LEARNING PLAN

The CFP Board Council on Education has developed a set of CE Quality Standards for various steps of the program development process. **Developing a Learning Plan** is a tool used by course designers and program developers to design and organize the program. Once developed, the last step is to add the content.



► Create a Learning Plan

The learning objectives and level of complexity have been articulated; it's now time to define the program outline. An optional step, a learning plan becomes an organizational tool to ensure the strategy for delivering on the learning objective outcomes is met. Following this simple template will ensure the final program delivery is organized and clearly focused.

Learning Plan Template

Learning Objective	Content	Time Allotted	Teaching Strategy
State the Learning Objective:	Identify the content to be covered:	% of time based on 80 minutes (1.5 CE) Program	PPT, lecture, discussion, polling, case studies, work-sheets, group-based activity, assessment, Q&A
EXAMPLE: Identify the significant changes to the tax law for 2018.	<ol style="list-style-type: none"> Review the significant changes to tax law. Explain what impact these changes will have on your clients. 	40 minutes 50%	PPT (8 slides) Polling activity, Q&A
Apply the changes to the individual income tax rates, estate tax rates and Alternative Minimum Tax.	<ol style="list-style-type: none"> Focus on reporting and coverage requirements 	20 minutes 25%	PPT (6 slides) Case Study as group activity; select one or two groups to present their response, Q&A

Assess the current landscape of enacted, probable, and possible tax law changes and the implications for planning.	1. Discuss strategies for ensuring clients are prepared and properly positioned for 2018 reporting.	20 minutes 25%	PPT (7 slides) Review worksheet, Q&A, final summary
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Additional Guidance Documents:

- Writing Meaningful Learning Objectives
- Levels of Complexity (Defined)
- Creating Effective Assessment Questions
- [Building a Quality Live Program](#)
- [Building a Quality Online Course](#)
- Designing a Program Evaluation
- Sample Program Evaluation

Comments or Questions? Please email us at cesponsor@cfpboard.org