

## 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 followed by a CE Quality Partner campaign implemented in 2016. The recommendations below incorporate the standards and best practices of the Quality Assurance Initiative and the Quality Partner program to promote learning.

### QUALITY STANDARDS OF DELIVERY

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

- ▶ Program policy is defined and includes how:
  - CE hours are determined (based on CFP Board guidelines)
  - Attendance will be determined, including any expectations for participation (address question of partial credit)
  - CE hours will be reported (based on CFP Board guidelines)
  
- ▶ Program 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 a 60-90-minute presentation)
  - 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
  
- ▶ Program 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
  
- ▶ Program 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 program, provide:
  - Summary of the Learning Objectives and key points related to each objective
  - Program evaluation to collect meaningful participant feedback

- A 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
    - i. Repeat the question asked before providing response to ensure it was heard by all and correctly heard by the presenter
    - ii. 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:
    - i. Signing In (and Out if applicable)
    - ii. Reporting of CE hours
    - iii. Distribution of Certificates of Attendance

Submit your programs to CFP Board for CE.

Go to [www.CFP.net/cesponsors](http://www.CFP.net/cesponsors) for more information on becoming a CE Sponsor.

Questions? Email [cesponsor@cfpboard.org](mailto:cesponsor@cfpboard.org)