



CPA Continuing Education Programme

Standards, Criteria, and Procedures for Approval of Continuing Education Activities for Canadian Psychologists

October 2010 revision with April 2012 update

Part I

INTRODUCTION

1. Background

This document is the most recent revision of the *Standards, Criteria, and Procedures for Approval of Continuing Education for Canadian Psychologists*. In 1983, the Board of Directors of the Canadian Psychological Association (CPA) established a system to approve sponsors of ongoing Continuing Education (CE) programmes. This was reaffirmed in 1986, and, in addition, a system for the approval of individual continuing education activities was established. The criteria, standards, and procedures of this manual were approved by the Board in 1983, and revised in 1986, 1990, 2000, 2005, and 2010, with an update (for clarification purposes) in 2012.

It is the responsibility of the Education and Training Committee of the Board to review the document and revise when and where necessary. CPA acknowledges the work of the American Psychological Association and the Canadian Guidance and Counselling Association in pioneering the content, structure, and procedures for continuing education. Their efforts have influenced the content and wording of this document.

This 2010 revision owes much to the earlier versions. This revision has been extended to include those CE activities that may: a) include conferences, and b) be provided via correspondence or in a non-face-to-face format, such as via teleconference, audio-visual, electronic, or internet based technology.

2. Continuing Education & Psychologists

With the rapid growth of knowledge in psychology, it is essential for psychologists to maintain continuing education and professional development in order to keep abreast of new knowledge, research methods, and practice techniques. It is also essential to develop additional competencies and awareness of limitations when, by choice or circumstances, psychologists change the focus of their work. The formal degree training provides the basic knowledge and skills at a given point in time, and provides the foundation on which to build a continuing career in psychology.

Continuing education is intended to provide psychologists with new information, research and skills in their area of focus but is not intended to replace formal degree or internship training. CE in psychology is an ongoing process consisting of learning activities that:

- (1) are relevant to psychological practice, education and science,
- (2) enable psychologists to keep pace with emerging issues and technologies, and
- (3) allow psychologists to maintain, develop, and increase competencies in order to improve services to the public and enhance contributions to the profession.

The need for continuing education is reflected in the *Canadian Code of Ethics for Psychologists* (Canadian Psychological Association, 2000). Specifically, Principle 11(8) states that Psychologists: "*Fully acquaint themselves with the relevant existing knowledge so as to better anticipate the consequences of their actions and to discern which activities are most likely to be of benefit to the individuals, families and groups with whom they are in contact.*"

There are many means by which psychologists may engage in continuing education. Ongoing professional development may be gained as a result of formal learning by attendance at conferences, workshops, courses and seminars. Alternatively, independent study, home study,

distance education, web-based instruction, or blended education has become increasingly common in Canadian society. What these latter techniques generally have in common is that participants can engage in learning at a place and time of their own choosing; they do not have to be physically present together to take part. In these forms of education the participants can manage their own learning but do not have direct face-to-face contact with instructors. In addition to traditional texts, contemporary technologies permit off-site or distance education to include use of audio-visual materials, teleconferencing, electronically or computer mediated communication, interactive learning in which participants get feedback on their performance, and the like. These technology based education programs (teleconference, audiovisual or internet based) foster the participation of individuals living in remote locations. It also appeals to many psychologists as a means of learning and accommodates to learners' scheduling constraints. For many, particularly in remote regions or in times of fiscal restraint, this education format may be more economical and more accessible.

Continuing education or professional development can also occur through participation in other learning activities as well as self-directed studies. Many professions now recognize the value of structured self-initiated learning projects, personal practice reviews, audits, incident reports, utilization studies, research, teaching and clinical practice guideline development as some of the many options that can contribute to continuing professional education.

This document applies only to the subset of CE activities that are structured and organized by a provider or sponsor. The document outlines the standards, criteria, and procedures of the CPA Continuing Education Approval System. Standards are listed followed by specific criteria. These standards and criteria apply to CE programmes offered under the auspices of CPA approval.

Part II

SPONSOR & PROVIDER APPROVAL SYSTEM

To facilitate the development and recognition of continuing education activities, the Canadian Psychological Association developed a system for reviewing and approving organizations and individuals which offer formal CE programmes and activities, including universities, clinics, professional associations, specialty societies, consulting firms, and individual psychologists.

Definitions:

- a. **Sponsor:** Facilitator of **ongoing** CE programmes, including **multiple** CE activities over the course of a year
- b. **Provider:** Facilitator of **individual** CE activities offered on a **single** occasion

CPA assures that the CE programmes and activities of the sponsoring organizations and individuals are adequately planned and administered to meet specified standards, criteria and procedures. CPA, through its Registrar for the Office of Accreditation, will review proposed new activities, as well as sponsor's ongoing activities through the annual report process.

Approval relates only to the ability to sponsor CE activities. It is not accreditation of the sponsor organization. Accreditation is reserved for formal educational training (graduate and internship) programmes. Advertising and promotional materials can refer to **approval** and are *not* to use the term 'accreditation'.

The granting of approval for an organization to sponsor CE does not constitute approval of that organization in its other activities. CPA has no legal or financial obligations to either approved sponsors or to those individuals registered for sponsors' continuing education activities.

1. Standards & Criteria for Approval of Sponsors and Providers

Application, review and approval of CE activities (including those offered via correspondence, or that employ a non-face-to-face format, such as via teleconference, audio-visual, electronic, or internet based technology) are provided in 2 categories:

Category A – Sponsors of ongoing CE programmes, including multiple CE activities over the course of a year

Category B – Providers of individual CE activities offered on a single occasion

All applications require statements about programme content, faculty and instructional personnel and programme evaluation. In addition, applications for approval as continuing (category A) sponsors must fulfill the administrative requirements outlined under criterion D, Administration.

A: Programme Content

CPA-approved CE programmes will promote the development of quality professional work in the areas of practice, university teaching, consultation, research, and other functions of psychology. Programmes are expected to build upon master's and doctoral education and to be relevant to the persons enrolled in the programmes. CE offerings for psychologists, and their stated educational objectives, should be based on needs that have been identified through solid assessment procedures.

Criteria:

1. Psychologist(s) must provide direct input and be involved in all aspects of the programme planning process for CE activities offered to psychologists for credit. Direct input and involvement can be provided by psychologists through their representation on advisory boards, CE committees, or any body with the responsibility of determining the content and structure of CE activities. Where the organization is owned or operated by one psychologist, it is recommended that this psychologist seek regular consultation regarding programme planning and evaluation to avoid the possibility of conflict of interest especially where resolution of participant complaints is involved.
2. The learning objectives of *CE programmes* are to be explicitly stated and will articulate whether the course focuses on the acquisition and demonstration of knowledge, the acquisition and demonstration of skills, or the formation or changing of attitudes.
3. Content will be related to psychological theory, method(s) or practice.
4. Content will be appropriate to stated learning objectives.
5. Content will provide a level of content and appropriate length of time consistent with stated learning objectives.

6. Learning activities carried out by participants will conform to the highest ethical and professional standards of the Canadian Code of Ethics for Psychologists (CPA, 2000).

7. Sponsors and providers will treat content objectively and ensure unbiased coverage of subject matter as it relates to age, gender, socioeconomic and ethnic backgrounds.

B: Faculty and Instructional Personnel

The quality and value of CE programs depend in large part on the instructor's expertise, competence in subject matter, and ability to facilitate learning to meet stated objectives.

Criteria:

1. Instructors must demonstrate current expertise in the area they will instruct and ability in teaching, in setting educational objectives, and in assessing outcomes.

2. Instructors' qualifications may be indicated by advanced degrees in psychology (or a related, appropriate discipline) from an accredited institution and evidence of specialized knowledge in a particular area.

3. Some methods of determining instructor teaching ability include review of records of previous teaching experience, evaluation forms from previous teaching positions, personal knowledge of the instructor's teaching ability, and references.

C: Programme Evaluation

Sponsors and providers will be expected to develop and use evaluation methods that are appropriate to the subject matter and objectives of each learning experience. At a minimum, evaluation will include assessment of participant learning and participant satisfaction with the programme. Evaluation information should be used in designing/redesigning courses.

Criteria:

1. Sponsors and providers must include information on evaluation plans with their application.

2. The written evaluation procedure should specifically assess:

- a) Degree of self-perceived (self-report) and/or achieved (objective) learning relative to the programme's specific educational objectives
- b) Participants' satisfaction with the overall program.

3. Assessment of participant learning can be achieved in a variety of ways in accordance with programme content and format. Post-tests, demonstrations and instructor-participant discussions and question and answer sessions represent some methods.

4. For programmes that are not conducted in person (e.g., teleconference, audio-visual, electronic, or internet based) sponsors must assess achieved learning by means of an assessment sensitive to actual level of learning or demonstration that a specific criterion (e.g., 75%) was met or surpassed. Programmes that adopt an essay assessment format must provide a grading grid.

5. Participant satisfaction evaluations at minimum address the following questions:
- Did the sponsor deliver what was promised?
 - Were the learning objectives met, in terms of outcome for participants?
 - Were teaching/learning methods effectively used?
 - How satisfied were participants with the course and instructor?

D: Administration – Applicable to Sponsor Category only

All CPA approved sponsors of ongoing CE programmes must have a clearly designated administrator, responsible for ensuring that programmes and activities meet the criteria specified in this document.

Criteria:

- The designated administrator must be qualified for the job as evidenced by training, background, and experience; evidence of those qualifications must be submitted with the application.
- The administrator must be knowledgeable regarding the CPA CE Sponsor Approval System criteria and procedures.
- There must be a mechanism or procedures to maintain current and continuing awareness of adherence to CPA CE policies and procedures, and to ensure continuity throughout administrative changes. If the designated administrator changes, CPA must be notified and provided with information on the replacement's qualifications.
- New programmes added by any Sponsor must be submitted for review prior to implementation.
- The administrator must submit an annual report. The report details:
 - CE programmes and activities offered over the past year
 - Problems encountered/managed
 - Evaluation summaries of all programmes and activities offered, including documentation that the programmes have met the stated learning objectives
 - Numbers of participants and number of continuing education credits for each activity
 - Schedule of activities to be offered in the following year

The annual report must be submitted to the CPA Continuing Education Office at the end of each calendar year.

Note that an approved sponsor of multiple CE activities will receive the following benefits:

- The sponsor may list its approval by the CPA on its CE materials, advertisements and promotional materials.
- The sponsor will be listed by the CPA in its publications and on the CPA web site as an approved sponsor of CE activities.
- The sponsor will be permitted to issue certificates of continuing education to participants of its CE activities, citing these activities as approved by the CPA sponsor approval process.
- As a service to its members, CPA will document approved Continuing Education hours in a confidential data bank. This documentation will occur at the member's request as indicated by the submission of a completed CE Credits Authorization form.

E: Awarding of CE Credit

Awarding of CE credit is based upon attendance, participation and learning in an activity that meets the above criteria.

Criteria:

1. Sponsors and Providers will determine in advance of offerings the standards for successfully completing the course and for awarding credits.
2. For **in-person programmes where attendance is monitored throughout** the duration of the programme, one continuing education credit is defined as one hour of instruction and/or participation in a continuing education activity. One credit is awarded for each hour of the CE activity, not including breaks. Partial credits will not be considered (e.g., if a participant attends less than the full activity).
3. For **non-face-to-face programmes** (teleconference, audio-visual, electronic, or internet based technology) sponsors must provide:
 - a. A description of the method (passwords or user ID) used to ensure that the person to whom CE credit is provided has actually done the work.
 - b. The method utilized to justify the number of CE credits to offer and a rationale for this method based on field testing or some other documented evidence.
 - c. For asynchronous online activities, the method through which participants can contact the presenter(s).
4. For **conference programmes where multiple workshops are occurring simultaneously**, credits should be awarded on a session by session basis. Each individual workshop or session for which credit is awarded must meet the standards and criteria for approval as a sponsored CE activity. Additionally, the sponsor/provider must provide:
 - a. A description of the method used to ensure that individuals attended the workshops or presentations for which they enrolled (e.g. monitored sign-in sheet).
5. It is the responsibility of the sponsor or provider to monitor and document credits.

Sponsors will provide documentation of completion of courses to participants (including credits) and will keep these on file for no less than two years.

Sponsors will submit information on continuing education activities (including credits) in their annual report to CPA.

F: Promotion & Advertising

Promotional materials are accurate and demonstrate careful consideration of ethical principles (content, credentials of presenters, objectives, etc.)

Criteria:

1. Participants have access to the following information before registering: learning objectives, participants for whom activity is designed and skill level for which activity is appropriate, schedule and format, equipment required, cost of activity, refund/cancellation policy, faculty credentials including highest relevant degree and present affiliation and number of CE hours.

2. There is a clear statement of who can benefit from the programme.
3. Mention of sponsor/provider relationship to CPA in promotional materials such as ads, brochures and announcements, is limited to the following statement:

"(Organization name) is approved by the Canadian Psychological Association to offer continuing education for psychologists. (Organization name) maintains responsibility for the program."

2. General Application, Review, & Renewal

In order to obtain CPA approval as a sponsor or provider of continuing education for psychologists, organizations must submit an application and the relevant fee to the Continuing Education Office of the Canadian Psychological Association. Applications are accepted by regular mail, fax, or email.

Applicants for approval as Sponsors of ongoing CE programmes which offer many CE activities over the course of a year (Category A) complete the application form in Appendix A; those Providers applying for approval of individual CE activities (Category B) complete the form in Appendix B.

Applications are reviewed throughout the year. Decisions can usually be made within **4 weeks** of receipt of a complete application. Applicants are encouraged to submit their materials for review as far in advance of their planned activities as possible. This ensures that an approval decision can be communicated before promotional information for an event is printed and distributed.

Approval will be based on the extent to which the application is judged to meet the criteria specified in this document. CPA reserves the right to seek additional information to that supplied by the applicant. Under special circumstances, *the Registrar* may request a site visit, with the cost of this borne by the potential sponsor.

Review and approval of sponsors and providers of continuing education is provided by the Registrar of CPA. The Registrar reports to the Continuing Education and Training Committee of CPA. In these reviews, the Registrar is bound by the criteria and standards specified in this document. The Registrar also submits an annual report to the chair of the CPA Education and Training Committee/CPA Board of Directors.

Approval as a sponsor of ongoing CE activities (Category A) is granted to applicants who meet the criteria. Approval is granted for a 1 year period. Renewal is then granted annually based on receipt of a satisfactory and complete annual report.

In the instance where approval is provided to a provider of an individual CE activity (Category B), such approval applies to that activity only, and does not apply to other or subsequent CE activities which may be offered by the same organization.

3. Review of Ongoing Sponsors & Appeal Procedures

Review of approved sponsors may be initiated by the Registrar under the auspices of the CPA Education and Training Committee. These reviews may be initiated on the basis of the Annual Report or other correspondence received. The following circumstances may prompt a review:

1. The sponsor's programme no longer meets the criteria covered by this document.
2. The sponsor's goals, activities, or administration have changed substantially.
3. Concern is raised about the quality of the CE activities of the sponsor.
4. The CE activities are substantially different than those described in the sponsor's application.

Under conditions of original review of an applicant sponsor or review of a previously approved sponsor, it is possible that a decision will be taken with which the sponsor disagrees. The decision of the Registrar, if adverse to the sponsor, may be appealed within 30 days of notification and in writing to the Chair of the Education and Training Committee. Such an appeal should include a statement of the reason(s) for appeal and supporting documentation, if available. The Education and Training Committee will review the information originally reviewed by the Registrar, as well as the material supplied by the applicant sponsor and will either:

1. Uphold the decision of the Registrar, or
2. Overrule the Registrar's decision.

In either case, both the applicant sponsor and Registrar will be advised of the reason(s) for the final decision of the Education and Training Committee.

4. Fees – Current as of April 2012

Application fee for providers of a **single** CE activity: (Category B)

\$200.00+GST/HST

Application fee for sponsors of **ongoing** CE programmes: (Category A)

1-5 annual activities	\$300.00+GST/HST
6-10 annual activities	\$400.00+GST/HST
11 or more annual activities	\$500.00+GST/HST

Annual fee for sponsors of **ongoing** CE programmes:

1-5 annual activities	\$200.00+GST/HST
6-10 annual activities	\$250.00+GST/HST
11 or more annual activities	\$300.00+GST/HST

Application fees are **due at the time of application**, and are non-refundable.

All fees from Canadian organizations are subject to the **relevant GST/HST**.

Fees can be paid by cheque, Visa, or Mastercard.