

# Instructor Packet Guidance

The purpose of this resource is to provide guidance to APA-approved sponsors who may wish to create “instructor packets” to assist their instructors in adhering to the [Standards and Criteria](#). While this resource provides general support, the responsibility of oversight remains with the APA-approved sponsor to ensure that all instructors and CE programs meet the [Standards and Criteria](#) in their entirety (i.e., while the instructor may agree to certain terms, the onus is on the approved sponsor to engage in oversight processes so that all requirements are met).

It is recommended that the APA-approved sponsor organization carefully review the agreement and relevant terms with the instructor(s) prior to each CE program. Queries regarding the use and implementation of this resource can be directed to the APA Office of CE Sponsor Approval at [SEducation-CESAS@apa.org](mailto:SEducation-CESAS@apa.org)

This packet contains the following:

- A sample checklist of affirmations and agreements that can be signed by the instructor and reviewed by the APA-approved sponsor
- A brief description of each Standard with guidance for understanding and implementing the outlined criteria

## Sample Instructor Checklist/Agreement Form

The purpose of this sample instructor checklist is to provide APA-approved sponsors of continuing education for psychologists and instructors with information to familiarize them with the [Standards and Criteria](#), establish expertise for teaching program content, and prepare for creating and providing CE programs for psychologists. Please be aware that the onus is on the APA-approved sponsor to ensure that all elements of the Standards and Criteria are met; this is not the responsibility of the instructor. APA-approved sponsors should always do their due diligence to ensure all aspects of the Standards and Criteria are met and communicate with selected instructors appropriately.

I have worked directly with the APA-approved sponsor's program planners/program committee to address the following items in alignment with the Standards and Criteria:

- I will ensure the security of tests and proprietary information, the confidentiality of individuals or organizations referenced within the program content that require confidentiality, and the privacy of participants.
- My program content, teaching environment, and approach address and respect aspects of diversity.
- I have submitted my full CV to the APA-approved sponsor and my CV has been reviewed and affirmed as demonstrating sufficient expertise to teach this program's content at a postdoctoral level.
- The learning objectives for this program clearly define what participants will know or be able to do as a result of having attended the program, and the objectives are measurable within the context of a CE program.
- The CE program I am presenting specifically addresses the learning needs of doctoral-level psychologists and builds upon the foundation of a completed doctoral program in psychology.
- I will present the scientific basis of the content presented, including the validity and utility of the content presented and associated materials, the basis of such statements of validity/utility, and the limitations and the severe and most common risks associated with the content.
- Program content is directly supported by at least three current (i.e., published within the past 10 years), relevant (to the specific program content) and peer-reviewed references. These references have been verified by the APA-approved sponsor. I also understand the specific Standard D.1 criterion that this program meets, and the references I have provided align with the selected D.1 criterion for this program.
- I have disclosed to the APA-approved sponsor and participants any commercial support (for the program, presenter, and/or product) and/or any other relationship that could be construed as a conflict of interest.
- Participants will be asked to complete a written evaluation form at the end of the program. Evaluation forms evaluate participants' perceptions as to how well each individual learning objective was achieved, and they include both mandatory APA questions (with questions and anchors verbatim).
- There is a method in place to assess participant learning.
- (If applicable) **For homestudy programs:** I understand that participants must complete and pass a post-test to receive CE credit.
- The APA-approved sponsor has affirmed that aspects of the program adhere to the [Standards and Criteria](#). I have reviewed the relevant [resources](#) made available to me regarding these Standards.
- (If applicable) **For co-sponsored programs:** I acknowledge the definition of co-sponsorship as the mutual planning of an activity by two or more organizations. I understand that it is ultimately the responsibility of the APA-approved sponsor to ensure that all the [Standards and Criteria](#) are met. The Terms of Approval, as outlined within the [Policies and Procedures](#), remain the same for all approved sponsors; engaging in a co-sponsorship does not, in any way, absolve the sponsor of its responsibilities as an approved sponsor and it is not to be construed as lending or transferring approval status

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I have reviewed the documents and resources as outlined in Appendix A

Instructor's Name: \_\_\_\_\_

Instructor's Signature: \_\_\_\_\_ Date: \_\_\_\_\_

## Appendix A

- [Standards and Criteria for Approval of Sponsors of Continuing Education](#)
- [APA CE Sponsor Approval Resources](#)
- [Criterion B.1: Meeting Program Planning Standards](#)
- [Toolkit: Understanding and Addressing Diversity](#)
- [Curriculum Vitae Guidance for Establishing Expertise](#)
- [Guidance for Writing Behavioral Learning Objectives](#)
- [Standard D Toolkit](#)

## Standard A – Goals

Although sponsors may offer continuing education programs to professionals across a range of disciplines, CE offered to psychologists must build upon a completed doctoral program in psychology and adhere to the principles of [Standard A](#). The goal of a CE program must specifically address the learning needs of psychologists.



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### STANDARD A: GOALS

## ADDRESSING THE LEARNING NEEDS OF PSYCHOLOGISTS

While many APA-approved sponsors offer CE programs to a wide target audience and non-psychologists can attend and receive CE credit for programs offered by APA-approved sponsors, **CE programs must specifically address the learning needs of psychologists.**

### **APA-approved sponsors that meet this Standard should be able to:**

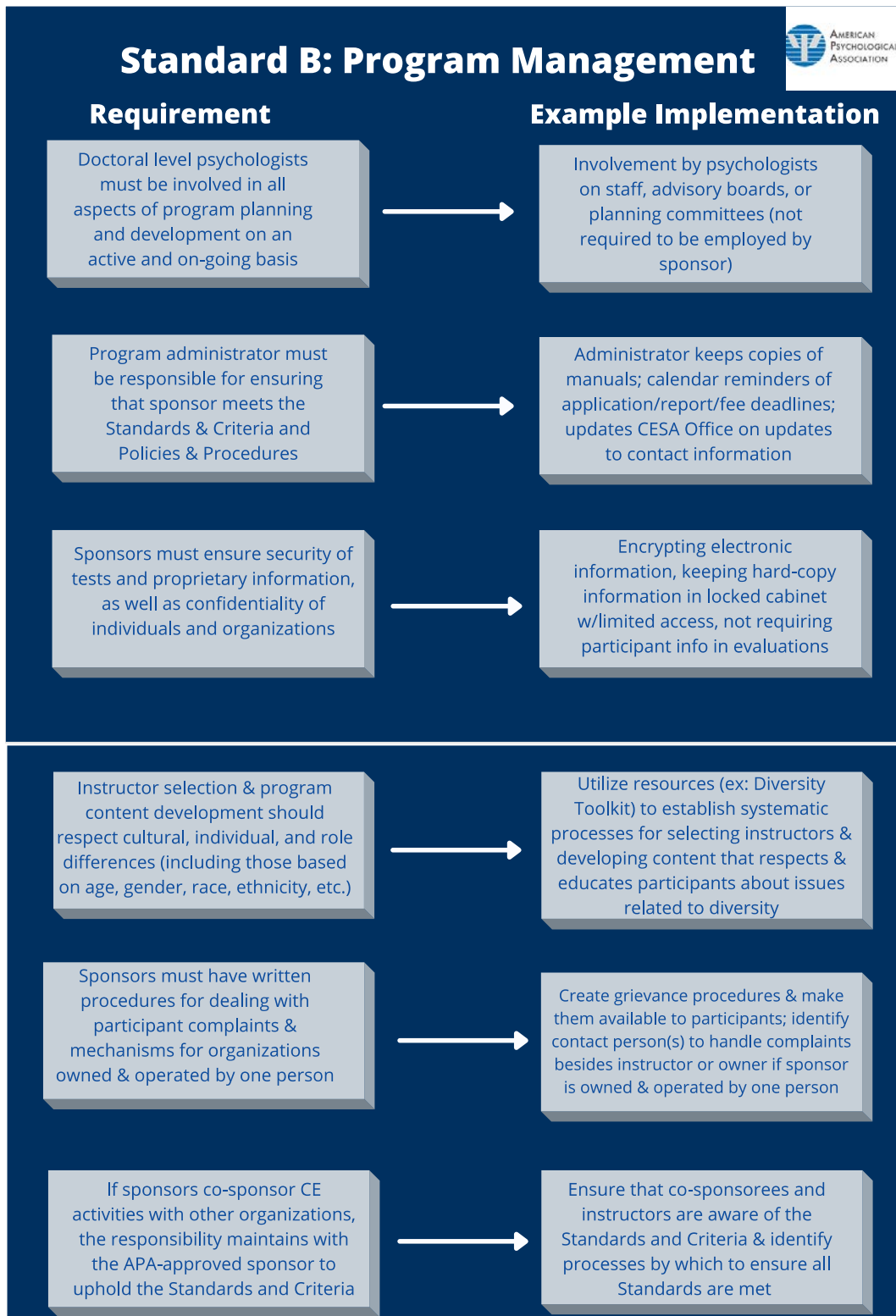
- Identify how their organization's program content, goals, and function is **relevant to psychological practice, education and/or science**
- Confirm that their program content **builds upon a completed doctoral program in psychology**
- Establish programs that enable psychologists to keep pace with the most **current scientific evidence** re: assessment, prevention, intervention, and/or education, and relevant legal, statutory, leadership, or regulatory issues
- Ensure their CE programs allow psychologists to **maintain, develop, and increase competencies** in order to **improve services to the public and enhance contributions to the profession.**



More information may be found in the [Standard A Video Tutorial](#) and on the [APA CESA Resources webpage](#).

## Standard B – Program Management

**Psychologists** must have **input** in all phases of the **decision-making** and **program-planning** process for the activities offered to psychologists for CE credit. Involvement must be on an **active** and **on-going** basis.



More information can be found in [Standard B](#), under the Standard B portion of the 'Application Support Materials' section on the [CESA Resources webpage](#), and within the [Standard B Video Tutorial](#).

## Standard C – Educational Planning & Instructional Methods

CE programs should have **predetermined learning objectives**, and the **instructors** of CE programs must have **demonstrated expertise** and be **competent** to **teach** the content of their programs at the **postdoctoral level**.

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# STANDARD C: EDUCATIONAL PLANNING & INSTRUCTIONAL METHODS

## Learning Objectives

Every program offered for CE credit must have predetermined **learning objectives** (LOs). LOs should:

- clearly **define** what the participant will **know** or be able to do as a **result** of having **attended** the program
- be stated in **measurable terms**
- **align** with the **amount** of **instructional time/CE credits awarded** for the program, like so:

<b>2-3 LO</b> for <b>1-3 hours</b>
<b>3-4 LO</b> for <b>4-6 hours</b>
<b>5-6 LO</b> for <b>7-8 hours</b>
- the **quality** and **quantity** should be considered of LOs for all programs, particularly for those longer than 8 hours
- **align** with the **description** of the **content** covered & **references** provided to **support the efficacy** of that approach/content
- be **consistent across materials** (evaluation forms, promotional items, etc.)

## Program Instructors

Every program's **instructor** should have **expertise** and be **competent** to teach program content at the **postdoctoral** level (though they are NOT required to be psychologists)

Some ways **instructor expertise** may be **demonstrated** are:


- relevant **educational experience**
- review of records of **previous teaching experience**
- years of **clinical experience**
- **publications** in areas **relevant** to the **content** being taught
- **evaluation forms** from previously offered programs
- **references**

**IMPORTANT NOTE:** Instructor Curriculum Vitae should effectively demonstrate expertise - see [CV Guidance for Establishing Expertise resource](#)

More information can be found in [Standard C](#), in the Standard C portion of the 'Application Support Materials' section on the [CESA Resources webpage](#), within the [Standard C Video Tutorial](#), and within the [CV Guidance for Establishing Expertise resource](#).

## Standard D – Curriculum Content

All **CE programs must meet one of the D.1 criteria** listed within [Standard D](#) of the Standards and Criteria. **Instructors** should work with the APA-approved sponsor to determine which of these criteria the program content meets to ensure adherence to Standard D. Instructors must also **describe** within each program the **accuracy** and **utility** of the **materials presented**, the **empirical basis** of such statements, the **limitations** of the content being taught, and the **severe** and the **most common risks**.




**References & Evidence Base:**  
Sponsors must provide **evidence** that program content has met the requirements of a specific D.1. criterion by providing **at least three references** that are:

- **Current** (published within the past 10 years)
- **Supporting** (e.g., peer-review journal articles for D.1.1 and D.1.3)
- **Relevant** (aligned with learning objectives and content)
- **Complete** (in APA format)

**Instructor Statements**

Instructors, during each CE presentation, must **include statements** that **describe** the **accuracy** and **utility** of the **materials presented**, the **empirical basis** of such statements, the **limitations** of the **content being taught**, and the **severe** and the **most common risks**.

## STANDARD D: CURRICULUM CONTENT



Sponsors must document that the **content** of each **CE program** meets **one** of the following **criterion**:

**D.1.1** Program content focuses on application of psychological assessment and/or intervention methods that have overall consistent and credible empirical support in the contemporary peer reviewed scientific literature beyond those publications and other types of communications devoted primarily to the promotion of the approach


**D.1.2** Program content focuses on ethical, legal, statutory or regulatory policies, guidelines, and standards that impact psychological practice, education, or research

**D.1.3** Program content focuses on topics related to psychological practice, education, or research other than application of psychological assessment and/or intervention methods that are supported by contemporary scholarship grounded in established research procedures

More information can be found in the [Standard D Toolkit](#), in the [Standard D Video Tutorial](#), and within the [CESA Resources webpage](#).

## Standard E – Program Evaluation

Sponsors must obtain and use **evaluation data** from participants to **plan** and **improve future programs**. The below infographic provides some reminders and information pertaining to program evaluation, all of which is pertinent to CE sponsors and program instructors.

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# STANDARD E: PROGRAM EVALUATION

Evaluation of CE programs is for the purpose of improving and planning future programs. Below is a list of **items** that must be **assessed** by participants **on the evaluation form**:

- Each **learning objective**
- **Instructor expertise/competence**
- Participant **satisfaction** with the program
- Participant **learning** (via Q&A sessions, post-tests, etc.)
- **Participant perception** of the **utility** of **program-based learning** to **psychological practice** or other **professional development**, particularly via the **two mandatory questions** listed below:

**How much did you learn as a result of this CE program?**  
1 2 3 4 5  
(1 Very Little — 5 A Great Deal)

**How useful was the content of this CE program for your practice or other professional development?**  
1 2 3 4 5  
(1 Not useful — 5 Extremely useful)

A Reminder:  
CE certificates and the awarding of CE credits should not be withheld in cases where participants have specifically opted out of completing the evaluation form

More information can also be found on the [CESA Resources webpage](#), in the [Standard E Video Tutorial](#), and within Standard E of the [Standards and Criteria](#).



## Standard F – Standards for Awarding Credit

CE credit is based on **1 CE per 1 hour of instruction**, and all **programs** offered for CE must be **at least 1 hour in length**. While instructors may receive CE credit for teaching a CE program, they must contact their state licensing board directly to see if this would meet their requirements.



### Standard F: STANDARDS FOR AWARDING CREDIT



**As an instructor, the following may be useful to keep in mind when teaching CE programs:**

- **Participants must attend the full program** in order to receive CE credit and variable credit cannot be awarded for partial attendance
- Attendance may be monitored via **room monitors** and **sign-in/out sheets, webinar monitoring, embedding images/ words/ codes** that must be noted by attendees throughout the presentation. and more
- CE credit must be offered on the basis of **1 CE per 1 hour of instructional time**
- Instructors may obtain CE for teaching a course, but must **contact** their **state licensing board** directly for guidance

A Note about Evaluation Forms:

- Per the [Standards and Criteria](#), CE certificates and the awarding of CE credits should not be withheld in cases where participants have specifically opted out of completing the evaluation feedback form



More information can be found in [Standard F](#), under the Standard F portion of the 'Application Support Materials' section of the [CESA Resources webpage](#), and within the [Standard F Video Tutorial](#).

## Standard G – Promotion and Advertising of Programs

As for every Standard, the **APA-approved sponsor is ultimately responsible** for ensuring that **all elements of the program meet** the [Standards and Criteria](#). It is still useful for instructors to understand this Standard, particularly as it relates to **commercial support, conflicts of interest, experiential exercises, CEs vs. CEUs**, and the types of programs offered for CE credit.



# Standard G: Promotion and Advertising of Programs

While the APA-approved sponsor is responsible for ensuring that all elements of the [Standards and Criteria](#) are met and commercial support or conflicts of interest are disclosed, the following may be pertinent to instructors:

### Programs Offered for CE Credit

Promotional materials must **clearly indicate** which programs are **offered for CE credit**, particularly if programs are part of a **convention or conference with multiple sessions**.

### CE vs. CEU

APA-approved sponsors are approved to offer CE to psychologists, which is not the same as a CEU. CE credit for psychologists is granted on a **1 credit per 1 instructional hour basis**; CEU, on the other hand, refers to 10 contact hours, and is not part of the current vernacular related to APA CE.

### Experiential Components

Sponsors must ensure that any experiential exercise as part of a CE program is **linked directly to the active development of professional knowledge and skill**. More information can be found on this resource: [Experiential Exercises & CE](#)

### Commercial Support

Sponsors must **make clearly evident** to **all potential participants**, prior to registration, any **known commercial support** for CE programs or instructor. This may include **authored books** used in CE programs and/or **trademarked approaches** that have been developed by instructors for CE programming.



### Conflicts of Interest

Any other relationships that could be **reasonably construed as a conflict of interest** also must be disclosed. If there is **no conflict of interest or commercial support**, then that should be **clearly stated**.



More information can be found in the [Experiential Exercises & CE resource](#), in [Standard G](#), in the [Standard G Video Tutorial](#), and on the [CESA Resources webpage](#).