

CLINICAL PASTORAL EDUCATION

POLICIES AND PROCESSES MANUAL



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Policy 101(A): Admissions, Enrollment, and Returning/Continuing Enrollment Process

Policy: Admissions Policy outlines the qualifications, interview and approval process, and guidelines for returning students.

Purpose: To outline CPEI's admissions and enrollment policy

Scope: This policy applies to CPE Supervisors-Educators and Students

Date Developed: April 2020

Date Reviewed: 09042021;01012021; 01202023; 06262023; 08202023; 10082023

Disclaimer

Clinical Pastoral Education International's programs are designed to provide a reflective and relational learning environment in which students are expected to increase in self-awareness, be self-directed and explore one's theological understanding as it applies and is integrated into their abilities to practice competent pastoral care and pastoral supervision.

Completing a course(s) or one of the Certificate Programs does not guarantee employment or credentialing as a Board-Certified Chaplain or a Supervisor-Educator. Additional requirements are included in the Credentialing Manual.

Other Disclaimers for Applicants

CPEI will not discriminate based on race, color, creed, religion, ancestry, national or ethnic origin, sex/gender, sexual orientation, age, or disability and will provide an environment free from harassment.

CPEI aims to remove barriers that might prohibit equal access to services for persons with disabilities. This may include providing reasonable accommodation where appropriate. Individuals are responsible for notifying CPEI of the need for accommodation. Upon doing so, you may be asked for input, the type of accommodation you believe may be necessary or the functional limitations caused by your disability. Submit this form for consideration: [Disability Accommodation Form](#)

Target Audience

Although not limited to this group, the target audience for CPEI includes seminarians, clergy, elders, deacons, eucharistic ministers, nurses, social workers, and counselors.

General Admission Requirements

1. Completion of the CPEI Application (100%) before further actions can occur.
2. Photo identification is required. Acceptable sources include a school photo, a driver's license, or a government-issued photo.
3. Ability to speak, read, and write English. Prospective students whose native language is not English must demonstrate proficiency in English or submit a TOEFL score of at least 57.
4. Academic transcripts and/or diplomas are required. Failure to provide it in the application or during the first course of enrollment will result in the inability to enroll until it has been received. Applicants who have completed high school or other

education program but may not have access to a diploma may submit the self-certification form: [CPEI Self-Certification of Verification Form.pdf](#)

5. Applicants that submit a non-English transcript will be required to have a NACES member complete these evaluations. Applicants are responsible for any fees associated with this requirement. The website is <https://www.naces.org/>

Foreign Transcript Evaluation

Applicants can request an evaluation from a member organization of one of the three national associations of credential evaluation services:

National Evaluation Services

1. **The National Association of Credential Evaluation Services (NACES)** is an association of credential evaluation services with admission standards and an enforced code of good practice.
2. **The Association of International Credentials Evaluators (AICE)** is an association of credential evaluation services with a board of advisors and an enforced code of ethics.
3. **World Evaluation Services (WES)** provides credential evaluation services.

Fees for Evaluation Services

Credential evaluations are not free, and applicants are responsible for the cost of the selected service. The cost and the timeframe to perform the service will vary according to the complexity of the case and the amount of documentation provided. The entire credentialing process may take weeks to months. Prior to submitting any documents to a credential evaluation service, applicants may also need to obtain English translations of any non-English documents.

Student Recruitment

1. Sources: Students applying to CPEI come from a variety of sources, to include, but is not limited to referrals from students, supervisors-educators, CPEI Affiliates, seminaries and universities, employers, and online search.
2. Training: Annual training is provided to the supervisor-educators as to the guidelines and processes for recruitment, interviewing, and approval of students' applications.
3. Student Recruitment Responsibilities
 - a. As a student recruitment representative of an accredited distance education institution, including CPEI Affiliate Organizations, I recognize that I have certain responsibilities toward students, the public, and my institution (CPEI Affiliate Organization). To fulfill these responsibilities, I pledge adherence to this Code of Ethics.
 - b. I will observe fully the accreditation standards, rules, policies, procedures, and guidelines established by Clinical Pastoral Education International and any other authorized agency.
 - c. I will adhere to high ethical standards to the best of my ability and agree to:
 - 1) Observe the rights of all applicants fully and commit no action that would be detrimental to any applicant's opportunity to enroll because

- of race, sex, color, creed, or national origin.
- 2) Never knowingly make any false or misleading representation to any applicant or use any coercive practices in presenting the information.
 - 3) Enroll applicants only in the course or courses in which they have expressed their interest, provided they meet the qualifications and standards established by CPEI and my training program.
 - 4) Provide applicants only the information authorized by CPEI and my training program regarding the occupational opportunities for those who complete training and receive certificates, and never make claims guaranteeing employment, job promotion prospects, or income increases to an applicant.
 - 5) State accurately and clearly to prospective students the approvals, accreditation, business and employer recognition, and course acceptance requirements.
 - 6) Provide only full and accurate information on the transferability of completed course credits of CPE that are accepted by other CPE accreditation entities and disclose affirmatively the fact that the acceptance of completed courses is entirely the prerogative of the receiving entity, and acceptance cannot be guaranteed.
 - 7) Provide prospective applicants only complete and accurate information on the total financial obligation they will be incurring to accept their enrollment application.
 - 8) Provide students prior to enrolling complete and accurate information about financing options for students and answer any questions.
 - 9) Never use tuition assistance available from a government agency or other sources as the primary inducement for enrollment.
 - 10) Refrain from making any statement or inference that might falsely impugn the integrity or value of any internal and external CPE organization, entity, method of training, or profession.
 - 11) Discharge faithfully and to the best of my ability all the duties, obligations, and procedures established by CPEI and my CPEI Affiliate Organization for my position, and I know all of my commitments as a CPEI representative.
 - 12) Reflect at all times the highest credit upon myself, my CPEI Affiliate Organization, CPEI, and the field of distance education, and always strive to enhance the reputation of my profession through my conduct as a representative.

Program Specific Requirements

1. CPE Applicants
 - a. Possess a minimum of a high school diploma or equivalent. Students without formal theological training may apply but are encouraged to review the requirements for certification.
 - b. Acknowledge the requirements to fulfill financial requirements, participate in weekly meetings with peers and supervisor-educator, complete assignments outside class, and meet the required internship hours.

- c. The Acceptance Process is in part determined by the applicant ability to demonstrate:
 - 1) spiritual and emotional maturity.
 - 2) articulates one's ability to respond to individuals in crisis or other ministry needs.
 - 3) self-motivation and engaging in an action/reflection mode of learning.
 - 4) the ability to engage one's supervisor-educator and peer group for learning.
 - 5) the willingness to minister to persons of all faith groups and cultural backgrounds.

2. Supervisory Certificate Education Applicants

- a. Possess a minimum of a graduate degree (36 hours minimum) for Associate Supervisor-Educator and (72 hours for CPE Supervisor-Educator) in theology or a related discipline. Individuals who do not meet the minimum requirements may submit for a review of educational equivalencies.
- b. Completion of a minimum of 4 courses of CPE (1600 hours).
- c. Associate or Board Chaplain Certification or an agreement to obtain within year one of the supervisory education course.
- d. Demonstrates:
 - 1) spiritual and emotional maturity.
 - 2) articulates one's educational goals.
 - 3) is self-directed and highly motivated.
 - 4) the ability to do research and write in an academic style.
 - 5) the ability to supervise and educate students from all faith groups and cultural backgrounds.

Admissions Process

1. Each Affiliate organization has its own Populi Application for CPEI. The application includes questions such as the source of one's contact with CPEI, Certificate Program or course selection (CPE 100-400 or SEC 600-900), student demographics, educational background, references, photo (government ID preferred), required essays, etc.
2. After the applicant completes and submits the CPEI application (100% complete), an interview will be scheduled with the applicant and an accept or decline form will be submitted. supervisor-educator will review, interview, and accept or decline the student.
3. Once the accept/decline form has been received, the Registrar will email the applicant of the acceptance or non-acceptance within 10 days, and if accepted, an enrollment form. Applicants who are declined acceptance may appeal the decision by using the following form: [Complaints and General Appeals Form](#)

Reasons why applicants might be declined include one or more of the following:

1. CPE: The applicant's inability to fully grasp the concept of Clinical Pastoral Education (CPE) and the adult learning process.
2. CPE: The applicant's inability to locate a suitable internship site in time for the course to begin.

3. CPE/SEC: There were concerns regarding the applicant's background check.
4. CPE/SEC: The term for which they were applying was full; however, they have been invited to participate in a future term.
5. SEC: The applicant failed to hold the appropriate academic qualifications for the program for which they were applying.
6. SEC: The applicant failed to demonstrate a clear understanding of the supervisory educational process.
7. SEC: The applicant failed to demonstrate the ability to communicate effectively in written and verbal forms.

Returning/Continuing Enrollment

1. Process for Returning/Continuing Enrollment of Students
 - a. Students that desire to continue with the next CPE/SEC Course will notify their supervisor-educator.
 - b. Supervisor-Educator will submit the “Returning Student Enrollment Form”
Returning Student Enrollment Form
2. Process for Returning Students After Absence of 12 Months or more must submit a new CPEI Application.

Policy 101(B): Transfer of Credit, Transcripts, and Evaluation

Policy: outlines the transfer of credit, transcripts, and evaluation process.

Purpose: To further communicate CPEI's policy regarding the transfer of credit for CPE or SEC transcripts, and the evaluation process.

Scope: This policy applies to CPEI Administrative Staff and Supervisors-Educators

Date Developed: April 2020

Date Reviewed: 09042021;10012021; 01202023; 06262023; 08302023;10072023

Guidelines for Transfer of CPE or Supervisory Credit

1. Official Transcripts: Students may submit official transcripts (preferably) or a certificate of completion from another Clinical Pastoral Education organization or educational institution indicating the completion of previous CPE courses or units. The transcript or certificate must be from a pastoral care cognate organization that is either recognized by the US Dept of Education or an active member of the Commission on Ministry in Specialized Settings (COMISS).
2. Exemptions: Since Clinical Pastoral Education (CPE) and Supervisory Candidate Education (SEC) are unique educational opportunities, CPEI does not allow for exemptions to the admission or credit for previous training, experiences, or experiential learning. This includes but is not limited to prior ministry experience or coursework which may have included chaplaincy training.
3. Transfer of Credit:
 - a. Students may apply for credit to be awarded for the Certificate in CPE or Supervisory CPE by completing the attached form. [Request to Transfer of Credit for CPE or Supervisory Education Coursework or Unit](#)
 - b. If approved, only one course/unit or 25% of the Certificate for CPE or SEC is allowable.
4. Training for Evaluators: Annually, individuals approved to evaluate and approve (Policy 101B, Guidelines for Transfer of CPE or Supervisory Credit, #5) review the process to ensure it is complete. Also, Supervisors-Educators are reminded of the approval process during a Professional Development Training Session.
 - a. Become familiar with CPEI's Policy 101(B)
 - b. Review and understand how to use the approval form for the request of transfer credit.
 - c. Become familiar with other pastoral care cognate organizations and their accrediting process The transcript or certificate must be from a pastoral care cognate organization that is either recognized by the US Dept of Education or an active member of the Commission on Ministry in Specialized Settings (COMISS).
5. Evaluation and Approval Process:
 - a. The Executive Director (Chief Academic Officer), Education Committee Chair (Associate Academic Officer) or the Registrar are authorized to review, approve or disapprove the request for transfer of credit.
 - b. The following form will be used to determine and award or deny credit. [Approval Form for Transfer of CPE or Supervisory Education Coursework or](#)

Unit

- c. The applicant will be notified of the decision.
 - d. If approved, the Registrar by entering a “P” for pass in the student’s Populi Profile and the student will be enrolled in the subsequent CPEI Course.
 - d. A record of the student’s transfer request and approval is added to the student’s record.
6. Transferring of CPEI Coursework to Another Educational or Training Organization:
There is no guarantee that coursework completed with CPEI will automatically be approved by another CPE or Educational institution. The receiving institution will determine the outcome of any transfer requests.

Policy 101(C): Ethical Recruitment of Students

Policy: This policy requires all CPEI representatives involved in student recruitment activities to act ethically and responsibly.

Purpose: To outline CPEI's guidelines for the recruitment of students and the process for reporting practices that fall outside this policy.

Scope: This policy applies to CPEI Faculty-CPEI Associate Supervisors-Educators (CPEI-ASE), CPEI Supervisors-Educators (CPEI-SE), and CPEI Training Supervisors-Educators (CPEI-TSE), Staff, and other Stakeholders who represent CPEI.

Date Developed: March 2024

Date Reviewed:

Student Recruitment Activities

1. Any activity, initiative, or interaction with the direct or indirect possibility of encouraging prospective students to apply to or enroll with CPEI is considered student recruitment.
2. Examples include, but are not limited to, verbal, written, or digital communication; application submission and review processes; and partnerships with others outside CPEI (i.e., seminaries, colleges/universities, religious affiliations, employers, etc.).

Recruiters for CPEI

1. The primary recruiter for CPEI is the Executive Director.
2. Supportive recruiters include:
 - a. CPEI Faculty- CPEI-SE, and CPEI-TSEs are recruiters for students.
 - b. CPEI Staff
 - c. Stakeholders (Supervisory Candidates and CPEI Board of Directors Chair).

Names Used by CPEI Recruiters

CPEI does not use the specific title of “recruiters” but define those with responsibilities of recruiting students by their staff or credentialing titles, i.e., Executive Director, Administrative Assistant/Registrar, CPE Faculty (CPEI-SE, and CPEI-TSEs), and other stakeholders, i.e., supervisory candidates (students) and the chair of the Board of Directors.

Training Guidelines for Training for All CPEI Recruiting Representatives

1. All CPEI student recruiting personnel must participate in annual training in March.
2. The annual training may include face-to-face training, video training or other means.
3. Upon completion of the training, the participants will acknowledge participation and agreement to adhere to the Code of Ethics for student Recruitment as outlined below. An example of an Annual Training Video is attached: [Annual Training Video](#)
4. CPEI Recruiting Representatives must agree to the following: I will adhere to high ethical standards to the best of my ability and agree to:
 - a. Observe the rights of all applicants fully and commit no action that would be detrimental to any applicant's opportunity to enroll because of race, sex, color, creed, disability, or national origin.
 - b. Never knowingly make any false or misleading representation to any

- applicant or use any coercive practices in presenting the information.
- c. Encourage applicants to apply for the course or courses in which they have expressed their interest, provided they meet the qualifications and standards established by CPEI.
 - d. Provide applicants only the information authorized by CPEI regarding the occupational opportunities for those who complete training and receive certificates, and never make claims guaranteeing employment, job promotion prospects, or income increases to an applicant.
 - e. State accurately and clearly to prospective students the approvals, accreditation, business and employer recognition, and course acceptance requirements.
 - f. Provide only full and accurate information on the transferability of completed course credits of CPE that are accepted by other CPE accreditation entities and disclose affirmatively the fact that the acceptance of completed courses is entirely the prerogative of the receiving entity, and acceptance cannot be guaranteed.
 - g. Provide prospective applicants only complete and accurate information on the total financial obligation they will be incurring to accept their enrollment application.
 - h. Provide students prior to enrolling complete and accurate information about financing options for students and answer any questions.
 - i. Never use tuition assistance available from a government agency or other sources as the primary inducement for enrollment.
 - j. Refrain from making any statement or inference that might falsely impugn the integrity or value of any internal and external CPE organization, entity, method of training, or profession.
 - k. Discharge faithfully and to the best of my ability all the duties, obligations, and procedures established by CPEI and my CPEI Affiliate Organization for my position, and I know all of my commitments as a CPEI representative.
 - l. Reflect at all times the highest credit upon myself, my CPEI Affiliate Organization, CPEI, and the field of distance education, and always strive to enhance the reputation of my profession through my conduct as a representative.

Additional Requirement for CPEI Faculty

In addition to participation in the annual training, CPEI faculty are required to submit an annual contract that includes the requirement to abide by the Code of Recruiting Ethics.

Maintaining Records

1. Copies of ethical recruitment annual training is captured via the [Annual Ethical Student Recruiting Compliance Form](#).
2. Records of compliance will be maintained in the Populi Personnel file.

Accountability

1. CPEI recruitment representatives are held to a high standard as outlined in this policy. Should it become known that a CPEI recruitment representative fails to live up to these standards, the following actions should be taken.
2. Individuals should submit the following form to file a complaint regarding a potential misrepresentation. The form will be directed to the CPEI Ethics Chair and CPEI's Executive Director for further action. [Ethical Recruitment Violation Reporting Form](#)
3. CPEI Chair of Ethics Responsibilities
 - a. The ethics chair will conduct an initial inquiry via a telephone or zoom call within 30 days of the filed complaint. As needed, the Ethics Chair may invite other members of the Ethics Committee to participate in the review.
 - b. At the conclusion of the review process and deliberations, the review panel will reach one of three decisions:
 - 1) There was no violation of the CPEI Code of Student Recruitment Ethics.
 - 2) There was no violation of the CPEI Code of Student Recruitment Ethics or Policies and Processes, but areas of concern were raised regarding the practices and conduct of the accused. These areas may be addressed in written form that may give suggestions or best practices to avoid future complaints or misunderstandings. The written document is not considered a disciplinary action by the review panel but an area the accused may seek guidance.
 - 3) There was a significant violation.
4. Enforcement When a Violation is Determined

When it has been determined that a violation of CPEI's Code of Ethics for Student Recruitment has occurred, it is incumbent upon the Ethics Committee to recommend one of several options:

 - a. Verbal consultation with the accused.
 - b. Letter of Notation that describes the complaint and resolution. The letter is placed in the individual's CPEI personnel file.
 - c. Letter of Warning that describes the complaint, actions that need to be taken, and consequences if not followed.
 - d. Probation will identify the complaint, actions needed to occur, the time limit of probation, and consequences if not followed.
 - e. Suspension of certification and affiliation. The individual and/or Affiliate Organization will be suspended for a determined period and will be unable to conduct training until the stipulations and requirements by CPEI are met and verified. This may also include suspension from any CPEI committee(s) or leadership position(s).

Policy 102(A): Student Tuition, Fees, and Refunds

Policy: The financial policy describes fees and refunds.

Purpose: To outline the guidelines for payment of fees and refunds, etc.

Scope: This policy applies to CPEI Affiliate Organizations, CPEI-Faculty, and Students.

Date Developed: April 2020

Date Reviewed: 09042021;10012021; 08072022; 01202023; 06062023; 08012023; 022024;03262024

Tuition and Fees

1. The total amount due for each course is \$1274.00 or \$5,096 for the Certificate in CPE and Certificate in Supervisory Education.
2. All student tuition and fees will be submitted through CPEI's payment site within our learning management system, Populi.
3. Tuition is due a minimum of seven days prior to the beginning of the term. Exceptions will be reviewed by the Administrative Assistant (adminasst@cpei.us) and submitted to the Executive Director for approval.
4. Failure to pay tuition and other fees in full is considered a drop in the course. The Registrar will review and submit it to the Executive Director for approval.
5. Students may keep any textbooks, notebooks, handouts, or other material given to them during their time enrolled for personal use. Students are not expected to return nor pay for them.
6. CPEI will deduct a one-time registration fee per course or program of no more than 20 percent of the tuition, which cannot exceed \$200 maximum for any student who withdraws after five days of signing the enrollment form. **NOTE: In Nebraska, the refund shall be made of all tuition paid except a registration fee not to exceed one hundred fifty (\$150.00) (005.02F2)**

Cancellation and Tuition Refunds

1. Students must submit in writing or email to request to withdraw to the CPEI Supervisor-Educator.
2. A student withdrawing within five (5) days of signing the enrollment form is eligible for a full refund of the monies paid.
3. A student withdrawing after five (5) days of signing the enrollment form but before the course or program begins is entitled to a refund of all monies paid to the institution minus one-time registration fee per course or program of no more than 20 percent of the tuition, which cannot exceed \$200 maximum. **NOTE: In Nebraska, the refund shall be made of all tuition paid except a registration fee not to exceed one hundred fifty (\$150.00) (005.02F2).**
4. Students canceling or withdrawing after the course begins are subject to refunds based on the guidance below.
5. Students may keep any textbooks, notebooks, handouts, or other material given to them during their time enrolled for personal use. Students are not expected to return nor pay for them.

6. Upon learning of the students' desire to withdraw, the Supervisor-Educator will immediately submit the following form: [Cancellation for Withdrawal Form](#)
7. The Registrar will cancel or withdraw the student immediately upon receiving the request and submit any refund the student is due within 30 days of request.

CPEI uses the Time-Based Refund Schedule. Refunds are calculated as outlined below.

Length of Term	Percentage of Tuition and Enrollment Fees Returned to the Student After	
11-16 Weeks	After 1 st Week	80%
	After 2 nd Week	70%
	After 3 rd Week	60%
	After 4 th Week	50%
	After 5 th Week	40%
	After 6 th Week	30%
	After 7 th Week	20%
	After 8 th Week	10%
	After 9 th Week	0%

NOTE: In Nebraska, the refund shall be made of all tuition paid except a registration fee not to exceed one hundred fifty (\$150.00) (005.02F2)

1. *Refund Example (Student withdrawing and the one-time administrative (registration) fee deduction):* A student who withdraws from a CPEI program after completing Week 5 is entitled to the following tuition reimbursement minus the applicable *administrative* (registration) fee. Total Tuition paid- \$1274. Administrative (Registration) fee deducted for program or first course withdrawal-\$200. Tuition less administrative (registration) fee- \$1074. Refund to student: 40% of \$1074 = \$430.00. **NOTE: In Nebraska, the refund shall be made of all tuition paid except a registration fee not to exceed one hundred fifty (\$150.00) (005.02F2)**
2. *Refund Example (Student withdrawing and no registration fee):* A student who withdraws from CPEI more than once will not be charged the one-time administrative (registration) fee. For example, a student who withdraws from a CPEI program after completing Week 5 is entitled to the following tuition reimbursement. Total Tuition paid- \$1274... Refund to student: 40% of \$1274 = \$510.00. **NOTE: In Nebraska, the refund shall be made of all tuition paid except a registration fee not to exceed one hundred fifty (\$150.00) (005.02F2)**

Scholarships and Financial Aid

1. Scholarships are not available through CPEI, and neither is financial aid through Financial Aid Programs (Title IV Pell Grants, Perkins Loans, etc.).

2. Students can apply to PayPal for credit, and there is NO interest if funds are paid in FULL in 6 months. Students can learn more about this option and apply through [PayPal Credit](#).
3. **IMPORTANT:** Once you have been approved and received the funds from PayPal, email CPEI Registrar at adminasst@cpei.us, and an invoice will be issued for funds to be uploaded to CPEI's Pay Pal Account.

Financial Aid and Tax Deductions

1. CPEI does not participate in Federal Financial Aid Programs (Title IV Pell Grants, Perkins Loans, etc.). Therefore, CPEI is not eligible to support a student's request for a delay or deferment of repayment.
2. CPEI is not eligible to issue a 1098-T since we do not participate in a U.S. Department of Education student aid programs. Furthermore, we are not allowed to discuss tax implications or give tax advice. Please consult your tax preparer with questions related to deductions.

Collections Process

Students applying and approved for enrollment in CPEI Programs are required to submit tuition payments and fees prior to the beginning of the course. Therefore, CPEI does not require a third-party Collection service.

Students that fail to pay in the appropriate time and notify the Registrar will be disenrolled in the course.

Truth in Lending Act Disclosure

1. CPEI agrees to not disclose credit card information to anyone other than the cardholder.
2. CPEI does not provide loans or extended payment plans to students.
3. Tuition is expected to be paid before or within the first week of the course. No discount is provided for early payment.

Policy 102(B): Tuition Discount

Policy: The policy refers to student discounts.

Purpose: To outline the guidelines for the allowance of student discounts as recommended by CPEI Affiliates and approved by CPEI.

Scope: This policy applies to CPEI and CPEI Affiliates.

Date Developed: March 2024

Date Reviewed:

CPEI Guidance

1. CPEI is required to review and approve all discounts submitted by CPEI Affiliates.
2. Changes made by CPEI Affiliates regarding the discounted category or amounts must be submitted to CPEI for approval using the form provided below.

CPEI Affiliates and Discount Categories

1. CPEI Affiliates must identify specific categories for discount purposes.
2. Examples of special categories could include, but are not limited to:
 - a. Military Students (Active, Guard, Reserves, Retirees).
 - b. Student Interns in a Healthcare setting
 - c. International Students
 - d. Other Groups (To be identified)

CPEI Affiliates, Discount Categories and Application

1. Discounts must be applied uniformly to all students identified in a Discounted Category.
2. Examples of applied discounts:
 - a. Military students: 10% per military student (Active, Guard, Reserves, Retirees) per course.
 - b. Healthcare Interns: \$500 per course (This amount could be higher or lower).
 - c. International Students: \$500 per course (This amount could be higher or lower).
3. Affiliates must state how they arrived at the discount.

Process for Approval of Discount Categories and Amounts

1. CPEI Affiliate Organizations will submit the following form to CPEI. [**Affiliate Discount Request Form**](#)
2. CPEI will review, approve, and maintain a copy on file.

Policy 103(A): Student Confidential Records

Policy: CPEI's policy for ensuring privacy and issuance of records.

Purpose: To identify guidance for ensuring privacy, maintenance, and release of records.

Scope: This policy applies to CPEI Staff, Supervisors-Educators and Students.

Date Developed: April 2020

Date Reviewed: 10112020, 12122020, 10012021;11182021; 08072022; 01202023; 08202023

Students' Responsibilities

Students are encouraged to maintain personal copies of their administrative, financial, and training records, which include but are not limited to CPEI Course Certificates, CPEI Course Evaluations (Student and Supervisor-Educator Evaluations), CPEI CPE Application Materials, CPEI Certification Application Materials.

Release of Student Training Records

Student records and transcripts will only be released with signed consent from the student and fees paid. The request form can be accessed via [Consent to Release Records](#)

Security of Student Records and Auditing of Records.

CPEI has based its Student Records Policy on the standards contained in The Family Educational Rights and Privacy Act (FERPA) (20 U.S.C. § 1232g; 34 CFR Part 99). All student records are considered confidential and are open only to CPEI administrative staff. The administrative staff is defined as someone employed by CPEI, support staff (volunteers and adjunct supervisor-educators), a person or company with whom CPEI has contracted; or a student serving on an official committee.

CPEI follows the guidelines set forth under FERPA to protect students' rights. Family Educational Rights and Privacy Act (FERPA) is a federal law that protects the privacy of student education records, both financial and academic. Certain student records cannot be released without the student's explicit consent for the student's protection. However, some directory (membership) information can be released without the student's consent, such as name, address, email address, phone number, dates of enrollment, student's current enrollment status, and CPEI courses completed. However, CPEI would first seek to obtain the student's consent.

Student Rights

The Family Educational Rights and Privacy Act (FERPA) affords students certain rights with respect to their education records. They are:

1. The right to inspect and review the student's education records within 45 days of the day the CPEI receives a request for access.

Students should submit to the Administrative Assistant/Registrar written requests that identify the record(s) they wish to inspect. The Registrar will arrange for access and notify the student of the time in which the records may be inspected. The Administrative Assistant may also seek assistance from other Administrative Staff to

assist with this request such as technology support, the Chief Academic Officer or Educational Committee Chair (Educational Director).

2. The right to request the amendment of the student's education records that the student believes to be inaccurate or misleading.

Students may ask CPEI to amend a record that they believe is inaccurate or misleading. They should write the Registrar (adminasst@cpei.us) responsible for the record, clearly identify the part of the record they want changed and specify why it is inaccurate or misleading.

FERPA was not intended to provide a process to be used to question substantive judgments which are correctly recorded. The rights of challenge are not intended to allow students to contest, for example, a grade in a course because they felt a higher grade should have been assigned.

If CPEI decides not to amend the record as requested by the student, CPEI will notify the student of the decision and advise the student of his or her right to file a grievance utilizing CPEI's formal grievance process regarding the request for amendment.

3. The right to consent to disclosures of personally identifiable information contained in the student's education records, except to the extent that FERPA authorizes disclosure without consent.

- a. One exception which permits disclosure without consent is disclosure to CPEI with legitimate educational interests. CPEI Administrative staff is defined as someone employed or volunteers in a leadership capacity, support staff (volunteers and supervisor-educators), a person or company with whom CPEI has contracted; or a student serving on an official committee. A CPEI official has a legitimate educational interest if the official needs to review an education record to fulfill his or her professional responsibility.

- b. A second exception which permits disclosure without consent is information identified as "Directory Information." Directory information contains personally identifiable information from a student's record that does not reveal or compromise the student's educational records. A student may prevent disclosure in the directory information by opting out. A student may opt out by emailing the Administrative Assistant/Registrar's Office at adminasst@cpei.us.

Students residing in countries which might consider their studies a violation of said country's censorship laws will automatically be excluded from the Directory Information.

Information available to the public includes Name, country of residence, email address program(s) of study-current and past, start date(s) of all programs attempted, projected end-date of studies, and student status.

4. Generally, educational institutions must have written permission from the student before releasing any information from a student's educational record. However, the law allows educational institutions to disclose records, without consent of the student, to the following parties: CPEI Administrative Staff, Supervisors-Educators and Supervisor Candidates who have a legitimate need to know; persons who need to know in cases of health and safety emergencies; accrediting organizations to carry out accrediting functions; Federal, State, and local governmental officials for purposes authorized by law; individuals who have lawfully obtained court orders or subpoenas; schools or institutions to which a student is applying or transferring, and courts during litigation between CPEI and the student;
5. Because CPEI does not utilize or otherwise receive federal monies or participate in the federal student loan program, students are not qualified to file a complaint with the U.S. Department of Education regarding FERPA.
6. In most situations, complaints related to CPEI's Student Records Policy can be resolved within CPEI on an informal basis. Any student who wishes to discuss a Student Records Policy complaint may contact the Registrar or CPEI's compliance officer. However, a student may at any time contact any state, municipal, or federal agency, legal counsel, or other outside agency as they may deem necessary.

Policy 103(B): Retention of Records Policy

Policy: CPEI's policy for the retention of records.

Purpose: To identify guidance for ensuring the retention of records.

Scope: This policy applies to CPEI Staff.

Date Developed: August 2023

Date Reviewed: 08252023

Guidance for Policy

State of Florida General Records Schedule GS5 for Public Universities and Colleges (June 2023)
The American Association of Collegiate Registrars and Admissions Officers (AACRAO); Federal Student Aid (FSA): [Exhibit 18. CPEI Record Retention Chart.xlsx](#)

Student Records Policy

CPEI maintains a file for each student who enrolls in the institution whether or not the student completes the educational service. Student files contain the following pertinent student records:

1. Written records and transcripts of any formal education or training, testing, or experience that are relevant to the student's qualifications for admission to the institution or the institution's award of credit or acceptance of transfer credits including the following:
 - a. Verification of high school completion or equivalency or other documentation establishing the student's ability to do college level work, such as successful completion of an ability-to-benefit test if required by the institution.
 - b. Records documenting units of credit earned at other institutions that have been accepted and applied by the institution as transfer credits toward the student's completion of an educational program.
 - c. Grades or findings from any examination of academic ability or educational achievement used for admission or college placement purposes.
 - d. All of the documents evidence a student's prior learning upon which the institution and the faculty base the award of any credit.
2. Personal information regarding a student's age, gender, and ethnicity if that information has been voluntarily supplied by the student.
3. Records of the dates of enrollment and, if applicable, withdrawal from the institution, leaves of absence, and graduation.
4. A transcript showing all of the following:
 - a. The courses or other educational programs that were completed, or were attempted but not completed, and the dates of completion or withdrawal;
 - b. Credit awarded for prior experiential learning, including the course title for which credit was awarded and the amount of credit;
 - c. Credit for courses earned at other institutions;

- d. Credit based on any examination of academic ability or educational achievement used for admission or college placement purposes.
- e. The name, address, website address, and telephone number of the institution.
- f. A document specifying the amount of a refund, including the amount refunded for tuition and the amount for other itemized charges, the method of calculating the refund, the date the refund was made, and the name and address of the person or entity to which the refund was sent.
- g. Copies of any official advisory notices or warnings regarding the student's progress.
- h. Complaints received from the students.

Maintenance of Records

1. CPEI shall maintain all records required above within the state of Florida.
2. Student transcripts are retained permanently.
3. For other student records described above, CPEI shall maintain them for a period of 5 years from the student's date of completion or withdrawal.
4. A student record is considered *current* for three years following a student's completion or withdrawal.
5. A record may be stored electronically if all of the following apply:
 - a. The record can be stored without loss of information or legibility.
 - b. For records that are *current*, CPEI maintains functioning devices that can immediately reproduce exact, legible printed copies of stored records. For a record that is no longer current, CPEI shall be able to reproduce exact, legible printed copies within two (2) business days.
 - c. CPEI has personnel scheduled to be always present during normal business hours who know how to operate the devices and can explain the operation of the devices to any person authorized to inspect and copy records.
 - d. Any person authorized by Florida to inspect and copy records shall be given immediate access to the document reproduction devices for the purpose of inspecting and copying stored records.
6. The institution's records are backed up daily.
7. All records that CPEI is required to maintain shall be made immediately available for inspection and copying during normal business hours and any entity authorized to conduct investigations.
8. In the event of closure, CPEI and its Governing Board are responsible to arrange at their expense for the storage and safekeeping in Florida of all records required to be maintained for as long as those records must be maintained. The repository of the records shall make these records immediately available for inspection and copying during normal business hours by any entity authorized by law to inspect and copy records.

Retention Schedule

See the CPEI Educational Records Retention Schedule regarding student and academic records.

Administrative Records

1. Generally, administrative and accounting records are kept for a minimum of seven years. The following are exceptions to the general rule.
2. Corporate and legal documents are generally kept indefinitely. Documents such as business formation records, corporate minutes, tax exemption, deeds, copyright and trademark registrations, property appraisals, property ownership records and bill of sale documents.
3. Business tax returns are kept for a minimum of seven years. Federal forms 990 and 990T (and state equivalents), payroll tax returns, information return filings, and sales tax returns.
4. Personnel records. Personnel files should be kept for a minimum of seven years after the end of employment. Dismissals, screening, and legal issues should be kept 30 years after the end of employment. Files for non-hires, including applications, resumes, and communications, are kept for one year. Year-end financial reports, including audited or reviewed financial reports, should be kept for a minimum of ten years.
5. Insurance, permits, and licenses are kept a minimum of three years after receiving replacement documents. In some cases, it may be appropriate to indefinitely save insurance policies.
6. Contracts, loans, and mortgage paperwork should be kept at least ten years after the closure of the liability (for mortgages, until the property is sold).
7. Once email communications are to be deleted once they are no longer needed. However, communications that are part of student records, official communications with federal or state agencies, etc., should be maintained within their related academic or administrative records.

In all cases, records need to be maintained to protect the interests of the institution, facilitate financial audits or reviews, facilitate accreditation reviews, and support inquiries from the state of Florida.

Auditing Procedure

1. On an annual basis, it is the responsibility of the Executive Council or appointed designee to select a time for record retention review and destruction. Appropriate record retention is an ongoing responsibility while review and destruction only need to be completed on an annual basis. Review and Destruction shall be conducted as follows:
 - a. Audit of records to ensure that records were processed appropriately throughout the year. This audit may be done according to CPEI guidelines as long as the process ensures that:

- b. Records are maintained in an easily accessible place, organization, and format. They are readily accessible for internal retrieval and review, and for external audit requirements.
 - c. Digital records are created in a way that prohibits editing or alteration.
 - d. Digital records are maintained in a manner that they can easily be produced or reproduced in a physical form. (Federal regulations require that any previously physical record be reproducible in much the same resolution and size as the physical original)
 - e. Records are organized in such a manner that their retention period can be identified for eventual destruction.
2. Verify that all records are secure. Records are also maintained digitally. Digital records are secured by permissions and by password access to records storage systems. All digital records storage systems have appropriate security measures.
 3. The records destruction schedule is reviewed and approved by the Executive Director.
 4. Approved records are to be destroyed in an appropriately secure manner.
 5. Note that it may be decided to keep records longer than their minimum retention requirement.

Electronic Records Storage

CPEI maintains its records storage electronically. This is good business practice for storage considerations, for ensuring backup copies of permanent records, and for organization and retrieval of other business records and documents. In addition, more and more transactions are completed electronically. The systems used to store electronic records are Populi.

Per Florida guidelines, records retention schedules apply to records regardless of the format in which they reside. Therefore, records created or maintained in electronic format must be retained in accordance with the minimum retention requirements presented in these schedules. Printouts of standard correspondence are acceptable in place of the electronic files. Printouts of electronic communications (email, instant messaging, text messaging, multimedia messaging, chat messaging, social networking, or any other current or future electronic messaging technology or device) are acceptable in place of the electronic files, provided that the printed version contains all date/time stamps and routing information.

Access Guidelines

1. User level – Access privileges is provided by adding users to specific documents, folders, or modules according to authorized job description needs. Guests can be added as “guest users” with the specific access terminated upon completion of the guest’s purpose.
2. System level – Access privileges are granted for those who oversee, manage, or maintain the records system(s).

3. Passwords – All those with access privileges must maintain secure passwords for access to the system, folders, or files.
4. Close and lock – When leaving a CPEI file storage system, users are to log out of the system. In addition, when key staff computers with access to CPEI’s systems are not in use, users are to shut down or lock their computers.

Organization of Electronic Records

Records are stored according to general filing categories to assist in organization and retrieval. Files are further organized according to their file type. For example, electronic student records are organized by name as either active or inactive students.

Annual Access Audit

Each year, or in specific events such as a change in staff, management will conduct a review and update of access privileges to all systems.

Maintenance and Security

At specified intervals (yearly) or with changes in file storage systems, the technology department will assist in verifying that all system upgrades are current, that users are correctly using the systems, and will also reconfirm internal security protocols and third-party security information.

Acceptance, Creation and Maintenance of Digital Student Records

Generally, PDF files are set so they cannot be edited or altered in any way, preserving the integrity of the original.

Digitizing Paper Transcripts

After transcripts are authenticated by verifying the source and validating any physical security features, the transcript and envelope are scanned using appropriate settings. A coversheet is added including the person who validated, the sender, and date of validation. The file is then added to the student’s record. If the student does not yet have a record, the file is placed in an admission holding folder for future addition to their record.

Verifying Electronic Received Transcripts

The process for verifying electronic transcripts involves the level of trust in the sender. 3rd party transcript services are verified as legitimate (i.e., Student Clearinghouse or similar agency). CPEI uses the sending entity’s instructions for downloading the transcript to ensure the integrity of the file. After downloading the file, we add our own coversheet that verifies the transcript is authentic, what service provided the file, and who processed it.

For files that are scans of a physical document that have security features that CPEI cannot verify with a digital file (heat marks, blacklight ink, etc.), we call the school to verify that the transcript is authentic.

Electronic Signatures

Once students have been accepted into the CPE or SEC Certificate Programs, they are issued an acceptance letter and then an enrollment form. The enrollment form requires a digital signature from Populi. Populi security guidelines state, “The primary data center backs up to a cloud-based data center. Populi is guarded by firewalls and overseen with proactive monitoring for hacking/probing attempts. All user access to Populi occurs over 256-bit SSL-encrypted connections.

Protection of Personally Identifiable Information

Personally identifiable information (PII) is generally: names, addresses, phone numbers, email addresses, Social Security numbers, student ID numbers, student information, financial information, and personal data (gender, race, birth date, nationality, etc.). PII is information which by itself or in combination with other information permits the identity of the individual to be reasonably inferred.

Access to student PII is to be protected and access limited to those who need to work with it. Protection for PII in electronic files includes each systems’ security measures, monitoring access to systems, and password access to each system.

Recordkeeping to Facilitate External Audits of Student Records

Student records are to be maintained in such a way as to readily support external audits by educational accreditors, the Department of Education, or state licensing agencies. For example, the files of student records should be able to support the following type of audit reviews:

1. Review of application files that have been processed for admission, to document the implementation of all components of the institution’s admission process. For exceptions to the admissions processes, documents showing the resolution within school guidelines or that students have been administratively withdrawn due to non-compliance.
2. Review of files for those who have been admitted to a program, applicants who have been denied, and applicants who are in process. Records of communication between CPEI and the applicant to document decisions being made throughout the process. Records of any exceptions (and their rationale and approval) to the standard admission process.
3. Review of documentation for transfer credits awarded.
4. Review of signed and approved enrollment agreements.
5. Review of files of withdrawn students to verify the dates, communications, and proper treatment of the cancellations.
6. Review of student refunds, including communications regarding dropping classes, processing of refund amounts, and date of refund check.
7. Review of student records for students who have been granted accommodations for individual differences.
8. Review of records associated with the actions taken regarding students who have failed to meet CPEI’s minimum standards of progress.
9. Review of official transcripts.

Data Security

Financial and student records are maintained in the following sources.

Financial Records

Financial and student records are maintained in the following sources.

Financial Records

According to QuickBooks website this information is found, “Currently, QuickBooks Online meets industry standards for online security, but is not compliant with the HIPAA standards for privacy. If you are a health care professional, it is not recommended that you enter "individually identifiable health information" into the QuickBooks Online program” (April 2021).

Financial records are securely maintained through QuickBooks which will remain in effect until the account closes, and even then, CPEI has access for over one year to our records (allowing time to download reports and/or transfer data to another system).

CPEI also has a 2-step authentication method in place for QuickBooks.

Stripe (Student Payment Processing)

Per Stripe’s website: “A PCI-certified auditor has audited Stripe. We’re a certified PCI Service Provider Level 1. This is the most stringent level of certification available in the payments industry. To accomplish this, we use the best-in-class security tools and practices to maintain a high level of security at Stripe.”

HTTPS and HSTS for secure connections: Stripe forces HTTPS for all services using TLS (SSL), including our public website and the Dashboard to ensure secure connections:

Stripe.js is served only over TLS.

Stripe’s official libraries connect to Stripe’s servers over TLS and verify TLS certificates on each connection.

Sensitive data and communication encryption: All card numbers are encrypted at rest with AES-256. Decryption keys are stored on separate machines. None of Stripe’s internal servers and daemons can obtain plain text card numbers but can request that cards are sent to a service provider on a static allowlist. Stripe’s infrastructure for storing, decrypting, and transmitting card numbers runs in a separate hosting environment, and doesn’t share any credentials with Stripe’s primary services including our API and website.

Systems for Records Storage and Protection

CPEI does not maintain any physical student records. All records are maintained in Populi, as well as in Quickbooks and Sharepoint.

Regarding Populi, the following list describes the various security layers—from the controls in place at their data centers to access permissions within Populi itself.

No physical records are kept by CPEI. Instead, organizational records are stored within the cloud-based systems that CPEI uses. Student and administrative records are stored electronically through SharePoint and Populi. Accounting records are stored within QuickBooks. For each of these systems, the records stored in them, data protection measures, and personnel access are described below.

SharePoint

CPEI uses SharePoint, a Microsoft Program to maintain copies of CPEI Handbooks, Manuals, and other sources used for courses, which can be linked to Populi courses.

Items stored on the SharePoint sites are maintained by the Executive Director and Administrative Assistant.

Populi

Financial, administrative and student records are maintained in Populi per CPEI Policy 103 and Policy 116.

Populi Security Measures

1. Customer data is stored in SSAE 22 Type II compliant data centers.
2. The data centers feature compartmentalized security zones and biometric access controls.
3. The primary data center backs up to a cloud-based data center.
4. Populi is guarded by firewalls and overseen with proactive monitoring for hacking/probing attempts.
5. All user access to Populi occurs over 256-bit SSL-encrypted connections.
6. User logins require alphanumeric passwords; two factor authentication is also offered.
7. User accounts are locked after too many failed login attempts.
8. User sessions are subject to automated timed logouts after a certain period of inactivity.
9. Information access in Populi is based on an individual user's role-based permissions.
10. All changes to core academic and financial data (as well as other data) are tracked in system change logs. All financial transactions have a complete audit trail.
11. Customer data is backed-up on a rolling basis: daily, weekly, and monthly.
12. The company has a [Privacy Policy](#) that discusses the collection, use and disclosure of information.
13. The company has a statement on FERPA, which is available in Section 4.5 of the Privacy Policy linked above.
14. The company has a business continuity plan that outlines disaster recovery (among other things).

Password Protection for Populi Accounts

1. Students can request a password reset should they forget theirs directly through Populi.
2. Faculty must submit a helpdesk ticket by emailing techsupport@cpei.us to

have their password reset.

3. Password Protection Guidelines

- a. Make sure the password is 12 or more characters long.
- b. Include punctuation marks throughout.'
- c. Include upper-case and lower-case letters throughout
- d. Avoid memorable keyboard paths, like 123456.
- e. Avoid using names.
- f. Use a 2-step authentication method of security.
- g. Change your password at least quarterly.

Policy 104: Complaints and General Appeals

Policy: A policy outlining the complaint and general appeals process and resolution guidelines.

Purpose: To outline CPEI's complaint and appeal policy.

Scope: This policy applies to all CPEI Certified Supervisors-Educators and Students.

Date Developed: April 2020

Date Reviewed: 10012021; 12072021; 10012022; 01202023; 06062023

Definitions

1. A complaint is an informal issue of a perceived conflict, which should be resolved at the lowest level.
2. General Appeals-refers to issues that may include a dispute regarding credentialing review or approval or similar matters.
3. Academic Appeals-refers to situations in which a student enrolled in one of CPEI's Educational Programs feels their grade was negatively impacted in some way.

Guiding Principles

1. Complaints and general appeals are encouraged to be resolved at an informal level, face-to-face, and in a spirit of collegiality and mutual respect.
2. Complaints or allegations that do not involve CPEI or CPEI but occur in a business, organization, or institution must first be reported to them according to their policies. This would include workplace harassment/abuse (sexual, verbal, physical, emotional).
3. Complaints that are not resolved at the informal level can be elevated to a formal written and signed grievance. The grievance must include the specific CPEI Code of Ethics Standard allegedly violated and submitted to the CPEI Affiliate Supervisor-Educator for resolution unless the complaint involves the supervisor-educator (faculty member). If it involves a supervisor-educator, the complaint is to be submitted directly to the Ethics Committee.
4. If the complaint is a legal matter the student will be directed to submit a complaint to the proper legal authorities in their locale.
5. Students may submit an academic appeal if they feel their grade was negatively impacted in some manner.
6. If the student prefers, they may submit a complaint to Florida's Commission of Independent Education where CPEI is currently an approved exempt educational organization. The process is as follows:
 - Name of Student (or individual wishing to voice their concern)
 - Address of Student (or individual wishing to voice their concern)
 - Phone Number
 - Name of Institution
 - Location of the Institution (City)
 - Dates of Attendance
 - A full description of the problem and any other documentation that will support your claim such as enrollment agreements, correspondence, etc.

- The process of the Commission involves contacting the institution to obtain their response to your concern. If you do not want the Commission to contact the institution you are attending, you must state so in your documentation; however, doing so will greatly hinder the Commission's ability to assist you with your concern.
 - Send Letter To:
 - Commission for Independent Education 325 W. Gaines Street, Suite 1414 Tallahassee, FL. 32399-0400, Email: CIEINFO@fldoe.org, Fax: 850-245-3238
7. Confidentiality is of utmost importance. Persons involved in an investigation, mediation, fact-finding, and record-keeping shall respect the confidentiality of all parties as far as possible without impeding the pursuit of truth or violating state laws.
 8. Persons that have a bias or conflict of interest will be removed from any aspect of the process.

Submission of a Complaint or General Appeal

A grievance is submitted in writing within 30 days of the alleged incident and submit the complaint to the CPEI Affiliate Director. [CPEI Complaint or General Appeal Form](#)

Submission of an Academic Appeal

Academic appeals must be submitted within 30 days after the finalizing of the CPE or SEC Course. [Academic Appeal Form](#)

Seeking a Resolution

The CPEI Affiliate Organization Director will seek to resolve the issue and provide a response within 30 days of receiving the complaint unless an agreeable solution cannot be reached. If there is a failure to reach a solution, the complaint can be submitted to the CPEI Chair of Ethics and Compliance for review.

CPEI Chair of Ethics Responsibilities

The ethics chair and a member(s) of the Ethics Committee will conduct an initial inquiry via a telephone or internet live connection within 30 days of the filed complaint.

1. The ethics chair will notify in writing the response of the review, and if an agreeable solution has been reached, the matter will be settled.
2. If an agreeable solution has not been reached, the Ethics Chair will appoint a mediator to facilitate discussion between the parties involved. This will occur within 30 days of the initial inquiry's final action.
3. If mediation does not bring a resolution to the issue, a formal review panel will be initiated. The Chair of the Ethics Committee will appoint a 3-person panel and invite all parties involved to participate at their own expense. After hearing the evidence and deliberating, the panel shall make a final decision and provide it in writing to the student within 10 days of the review.
4. The decision of the ethics and compliance committee is final.
5. A copy of the complaints and actions taken will be retained for a period of seven years.

Determination of Outcome

At the conclusion of the review process and deliberations, the review panel will reach one of three decisions:

1. There was no violation of the CPEI Code of Professional Ethics, Standards, Policies, or Processes.
2. There was no violation of the CPEI Code of Professional Ethics, Standards, Policies, or Processes, but areas of concern were raised regarding the practices and conduct of the accused. These areas may be addressed in written form that may give suggestions or best practices to avoid future complaints or misunderstandings. The written document is not considered a disciplinary action by the review panel but an area the accused may seek guidance.
3. There was a violation.

Enforcement When a Violation is Determined

When it has been determined that a violation of the CPEI Code of Professional Ethics, Policy, or Process has occurred, it is incumbent upon the review panel to recommend one of several options to the Ethics Committee for a final decision:

1. Verbal consultation with the Ethics Committee Chair.
2. Letter of Notation that describes the complaint and resolution. The letter is placed in the individual's CPEI personnel file.
3. Letter of Warning that describes the complaint, actions that need to be taken, and consequences if not followed.
4. Probation of certification. Probation will identify the complaint, actions needed to occur, the time limit of probation, and consequences if not followed.
5. Suspension of certification and affiliation. The individual and/or Affiliate Organization will be suspended for a determined period and will be unable to conduct training until the stipulations and requirements by CPEI are met and verified. This may also include suspension from any CPEI committee(s) or leadership position(s).
6. Removal/Withdrawal of certification. The removal of certification would occur only under extreme circumstances that would be detrimental to others, self, and CPEI. This would be the most severe decision made by the Ethics Committee.

Appeals Process

1. A member placed on suspension or the withdrawal of a certification by the Ethics Committee may appeal to the Chair of the Certification Committee, who will select a committee of four (4) other CPEI members who will sit on the Appeal Panel.
2. The appeal must be sent by registered mail to the Executive Director and Chair of the Certification Committee within 30 days of the Ethics Committee's decision. Mail to:

Executive Director
P.O. Box 9166
Fleming Island, FL 32006

The grounds for appeal must be either:

- a. The individual was not granted the time or opportunity to present relevant evidence within the time permitted that could have significantly altered the outcome.
 - b. There were irregularities in the proceedings that could significantly change the outcome.
3. The Appeal Panel will hear the evidence presented and, after deliberation, will report on their findings. If there are grounds for appeal, the Appeal Panel can take one of the following actions:
- a. Dismiss the original complaint and findings and set aside the action taken by the Ethics Committee.
 - b. Uphold the findings but modify the findings and sanctions.
 - c. Re-open the investigation (with the original investigators) and request additional information.
 - d. Uphold the original findings and sanction.

Maintaining Records of Filed Complaints/Grievances and Actions Taken

In the event that a complaint is filed against CPEI, its faculty, staff, students or other associated parties, a record of the complaint/grievance and the actions taken will be retained in the Accreditation Folder in Populi for a period of at least seven years or at least until the completion of the next cycle for reaccreditation.

Policy 105: Student Extension, Incomplete or Leave of Absence

Policy: A policy describing the mechanism in which CPEI Supervisors-Educators or Administrative staff address the request for an extension, incomplete, or a leave of absence.

Purpose: To declare CPEI's policy regarding the student's request for an academic extension, Incomplete, or leave of absence.

Scope: This policy applies to CPEI Affiliate Organizations, Supervisor-Educators, and students.

Date Developed: April 2020

Date Reviewed: 12202020; 10012021; 12072021; 01202023; 06262023

Expectations

1. Students are required to complete 100 hours of engagement and preparation learning and 300 hours of internship (distance education). These hours are expected to be completed within the specified term in which students are enrolled.
2. However, should students encounter circumstances beyond their control the following options are provided.
3. The following form must be used to request an extension, incomplete or a leave of absence. [Request for Extension, Incomplete or Leave of Absence](#)

Extension Request

1. Extensions are to be approved on a **limited basis** only. If a student requests an extension, the following processes must occur:
 - a. CPE and supervisory students discuss with their supervisor-educator the need for an extension.
 - b. A formal request must be submitted [Request for Extension, Incomplete or Leave of Absence](#)
2. Extensions cannot exceed 30 days.

Incomplete Grade/Credit

1. An incomplete (I) can only be granted in very special circumstances; otherwise, the student may qualify for a brief extension as approved by the Supervisor-Educator.
2. Special circumstances include, e.g., hospitalization, severe illness, and long-term recovery (verification may be required) that preclude the student from completing course requirements and internship hours.

Guidelines:

- a. Students must have completed a minimum of 50% of the coursework and internship hours to receive an Incomplete. Students must submit a written request (email) to the Supervisor-Educator requesting approval. The approval must be included in the student's Populi profile. Once agreed upon the request, a maximum of 3 months can be granted within which the course requirements must be completed. Any request to allow for an incomplete beyond the 3 months must be approved by CPEI Executive Director.

- b. Once the requirements have been completed within the agreed upon time, the student will be enrolled in the same course, but at mid-course to complete the remaining hours. At that time, the student's grade will be changed from an "I" to a final grade.

Tuition and refunds for Incompletes:

- a. Students that seek an Incomplete (I) but have not completed a minimum of 50% of their coursework and internship hours will be refunded tuition, enrollment and registration fees based on the standard refund policy and no academic credit awarded.
- b. Students that seek an Incomplete (I) after completing a minimum of 50% of the coursework and internship hours by mid-course or beyond will have the funds applied to the next course when they are able to continue their training.

Military Leave of Absence Request

In accordance with the Federal and state laws any member of the military who is ordered to guard or federal duty may request a leave of absence unless they can fulfill the requirements of the courses as an online student. To request a military leave of absence, the following actions are required.

1. Students must submit a copy of the military orders.
2. Length of the time requested must be approved by the supervisor-educator for approved request.
3. Based on the completed coursework and assignments, the student can opt for one of the following options:
 - a. Option #1: Students not enrolled in an online course versus a hybrid course may be given the option to continue their studies.
 - b. Option #2: Students that seek an Incomplete (I) but have not completed a minimum of 50% of their coursework and internship hours will be refunded tuition, enrollment and registration fees based on the standard refund policy and no academic credit awarded.
 - c. Option #3: Students that seek an Incomplete (I) after completing a minimum of 50% of the coursework and internship hours by mid-course or beyond will have the funds applied to the next course when they are able to continue their training.
3. The supervisor-educator will submit a response to the Administrative Assistant using the required Populi form the decision approved.
4. Copies of the actions are maintained in the student's academic file.

Policy 106: Students and Supervisor-Educator Rights and Responsibilities

Policy: A policy addressing staff, students, and supervisor-educator's rights and responsibilities.

Purpose: To declare CPEI's policy for identifying student rights and responsibilities.

Scope: This policy applies to Supervisor-Educators, CPEI Affiliate Organizations, and Students.

Date Developed: April 2020

Date Reviewed: 12202020; 10012021; 01202023

Student Rights

1. Have his or her rights respected and protected and be treated with respect.
2. Receive quality clinical and educational experiences.
3. Experience an environment conducive to learning.
4. Experience an environment free from sexual harassment and other forms of harassment.
5. Participate in planning his or her learning experience.
6. Receive professional assessment in an atmosphere of care.
7. File a complaint or grievance and receive due process.
8. Expect a safe and clean working environment.
9. Understand and agree to the financial commitment,
10. Receive a course syllabus.

Student Responsibilities

1. Enroll and pay the fees for each CPE or Supervisory Course.
2. Read through the student handbook that is applicable to one's Certificate Program.
3. Engage regularly in group and individual supervision.
4. Participate in and take responsibility for his or her learning.
5. Maintain absolute confidentiality in the peer and supervisory group.
6. Maintain active participation in the internship site.
7. Accomplish the course requirements.
8. Protect the confidentiality of peers, clients, parishioners, and family rights.
9. Be professional and ethical in serving clients, families, staff, and volunteers.
10. Be punctual and present for all scheduled group and individual supervisory sessions.
11. Demonstrate awareness and application of professional and personal boundaries.
12. Be responsible for tuition and required fees.
13. Conduct one's behavior in compliance with CPEI's Code of Professional Ethics, which indicates that students are expected to conduct themselves professionally, personally, and ethically in every aspect of their training. This includes following the CPEI Code of Professional Conduct, the expectations outlined in an internship site, and their written work, which is expected to be their own or the work of others cited.

Staff and Supervisor-Educator Responsibilities

The administrative staff and supervisors-educators are committed to the student's success as the focus of our learning has been established to the adult learner. Based on research adult learners:

1. Need to know why and what they are learning.
2. Self-concept of the learner-autonomous and self-directing.
3. Prior experience of the learner.
4. Readiness to learn- life-related and developmental task.
5. Orientation to learning- problem-centered and contextual.
6. Motivation to learn-intrinsic value and personal payoff.

Because of these insights and the specific theoretical positions that guide the work of interacting with adult learners the following guidelines aid in this process from the supervisors-educators.

1. Create a safe learning environment.
2. Encourage participation while respecting the learner.
3. Provide structure but allow for flexibility.
4. Affirm the students' contributions and presentations.
5. Allow time for reflection and critical thinking.
6. Challenge students to explore new approaches and opportunities.
7. Demonstrate respect for the individual, their learning style, and experience.
8. Be open to different perspectives.

Furthermore, the supervisors-educators provide ongoing encouraging and supportive feedback to ensure student success. It is also understood that mid-course evaluations are designed to aid in mid-course corrections and the final evaluations are not designed to be punitive but to provide a unique perspective to affirm the student for they have accomplished and provide guidance for future courses or certification.

Policy 107: Distance Education and Internship Requirements

Policy: A policy identifying the requirements for distance education and the internship requirements.

Purpose: To declare CPEI’s policy for defining distance education and the internship requirements.

Scope: This policy applies to CPEI Affiliate Organizations, CPE Supervisor-Educators, and students.

Date Developed: April 2020

Date Reviewed: 1222020; 10012021; 01202023

CPEI Requirements

Clinical Pastoral Education International (CPEI) requires the completion of 400 hours of engagement and preparatory learning.

Distance Education and Internship

In keeping with our mission, CPEI provides “quality, inclusive, and life-transforming clinical pastoral education internationally through online and hybrid modalities to develop competent pastoral clinicians and supervisory educators.” Hybrid and online distance education involves both engagement and preparatory learning with a minimum of 51% distance education.

Background Check Requirements

1. Students must provide evidence of a current background check unless covered by the Internship site.
2. Students living outside the United States are not required to provide a background check but are encouraged to do so.
3. Recommended Affordable Source: Clear Checks- <https://clearchecks.com/order-report>

Policy 108: CPEI Commitment to Students

Policy: A policy outlining the process for the completion of training in the absence of a Supervisor-Educator or closure of a CPEI Affiliate Organization.

Purpose: To declare CPEI's policy, ensuring quality education and continuity of training in the absence of a Supervisor-Educator.

Scope: This policy applies to CPE Supervisor-Educators, CPEI Affiliate Organizations, and Students.

Date Developed: April 2020

Date Reviewed: 12202020; 10012021; 03042022; 01202023; 06262023

CPEI's Commitment

Clinical Pastoral Education International (CPEI) commits that all students enrolled in CPEI will receive the training or education under the terms of their commitments, including receiving all learning materials and student services on a timely basis.

Commitment to CPEI Students and Supervisors-Educators to Fulfill Training

1. A minimum of three (3) and a maximum of nine (9) students are required for all CPE courses.
2. A course in progress that has students withdraw, thus dropping the number of enrollees below 3, has the following options.
 - a. Option 1: A course with a minimum of three students and one student withdraws, the course will continue with the remaining students. The refund and cancellation policy applies.
 - b. Option 2: For a course with a minimum of three students and two students withdrawing, the course will not continue. The Supervisor-Educator will consult with other ongoing CPE groups to confirm whether the remaining student can join them to complete the training; otherwise, the student will be reimbursed the total amount and allowed to enroll in the next course. The Supervisor-Educator will determine if sufficient time has occurred to award a minimum of ½ course credit.

Policy 109: Technology Requirements and Support

Policy: A policy outlining the requirements and support for technology and responsible behavior.

Purpose: To declare CPEI's policy for technology and ensure individuals respond professionally.

Scope: This policy applies to CPEI Affiliate Organizations, Supervisor-Educators, and Students.

Date Developed: April 2020

Date Reviewed: 12202020; 10012021; 03042022; 01202023

Technology Requirements

All students must have access to a computer for the distance learning experience in small groups and individual supervision as well as to engage the Library Resources on CPEI's website and to participate in the LMS Modules for each course.

1. A computer or tablet with a high-speed internet connection
2. Video camera
3. Audio connection.
4. Access to Videoconferencing, e.g., Zoom, Microsoft Teams, etc.
5. Access to LMS

Technology Support

1. The Supervisor-Educator for each course is responsible for assisting within the scope of their expertise to engage the small group via the online account, i.e., Zoom.
2. Matters related to computer issues, website connections, webcam etc., are beyond the scope of the Supervisors-Educators and will require the student to seek professional assistance outside CPEI. (NOTE: Visible participation via the webcam is required for students participating in the Zoom meetings).
3. Response to most inquiries is handled within 24 hours.
4. Populi Support:
 - a. CPEI Support is available Monday through Friday, 8 a.m.-5 p.m. Central Time, excluding U.S. Holidays by submitting the request using this email- techsupport@cpei.us. A minimum of 24 hours is required before a response may be provided.
 - b. Populi Support is available on a limited basis Monday through Friday, 6 a.m. to 5 p.m. Pacific Time, excluding U.S. holidays.
5. Library access and support is available Monday through Friday, 8 a.m.-5 p.m. Eastern Time, excluding U.S. Holidays by submitting the request using this email gnjtpc@gmail.com. A minimum of 24 hours is required before a response may be provided.

Professional and Confidential Behavior

Since CPEI utilizes distance education as its primary format, it is incumbent upon the Supervisor-Educators and the students to conduct themselves professionally.

1. Be punctual and on time.

2. Be prepared.
3. Ensure your computer, webcam, and speakers are operational before each meeting.
4. Dressing appropriately-business casual is a good rule of thumb.
5. Remain engaged. Avoid checking email, completing assignments, searching the internet, sleeping, etc.
6. Confidentiality
 - a. Students and Supervisor-Educators must maintain confidentiality with all material shared in and outside the group.
 - b. Students and the Supervisor-Educators must locate a confidential location in which to conduct CPE. Family members, pets, television, or radio noise, etc. can be both a distraction and interruption to confidential discussions.
7. Meals
 - a. Avoid eating meals in front of one's group.
 - b. Eating snacks is acceptable if it is not disruptive.

Policy 110: Anti-Discrimination and Harassment

Policy: A policy outlining the requirements to avoid discriminating and harassing behavior.

Purpose: To ensure that all participants are informed and acknowledge the Anti-Discrimination/Harassment Policy.

Scope: This policy applies to CPEI Affiliate Organizations, Supervisor-Educators, and Students.

Date Developed: April 2020

Date Reviewed: 12202020; 10012021; 01202023

Guidelines

1. CPEI is committed to providing an environment free from harassment and other forms of discrimination to its students, members, or certified persons.
2. CPEI will not tolerate harassment of any nature, which includes but is not limited to sexual harassment, unwelcome sexual advances, requests for sexual favors, and other verbal or physical harassment of a sexual nature."
3. CPEI will ensure all applicable CPEI policies and processes are listed on our website and CPE Handbooks.
4. Failure to comply will result in a referral to the CPEI Ethics Committee for investigation and recommendation.

Policy 111: Disclosure of Propriety Interest or Dual Relationships

Policy: Propriety Interest and conflict of interest is to be reported.

Purpose: To declare guidance for declaring CPEI's policy regarding one's propriety interest, intellectual property rights and a conflict of interest.

Scope: This policy applies to all CPEI staff and supervisor-educators.

Date Developed: April 2020

Date Reviewed: 12202020; 10012021; 01202023; 08152023

Process

1. Dual or multiple relationships refer to situations in which multiple roles exist between a supervisor-educator and a student. Examples of dual relationships are when the student is also a friend, family member, employee, or business associate of the Supervisor-Educator.
 - a. If a dual or multiple relationship exists, the supervisor-educator will recognize the issue and refer the student to another supervisor-educator.
 - b. If a question exists as to whether a dual or multiple relationship might exist, the supervisor-educator is to seek consultation from the Ethics Committee Chair.

2. Conflict of Interest is defined by CPEI as occurring when an individual has an opportunity to affect course content about products or services of a commercial interest with which he/she has a financial relationship.
 - a. CPEI Staff and Supervisor-educators will notify in writing or email the Executive Director of a financial interest in a product, material or service that is required of students or CPEI.
 - b. The Executive records the notification and forwards the information to the Executive Council and the compliance officer with any recommendations or concerns.
 - c. Following guidance from the Executive Council, the Executive Director either rejects the use of the content, material, or service, or approves and publishes a disclosure of conflict of interest/relationship. The supervisor-educators', staff, or employee is notified.
 - d. All records concerning conflict of interest will be maintained by the Administrative Assistant.

Policy 112: Intellectual Property

Policy: CPEI will comply with the intellectual property.

Purpose: To provide guidance on Intellectual property.

Scope: This policy applies to administrative staff, supervisors-educators and students.

Date Developed: April 2020

Date Reviewed: 12202020; 10012021; 01202023; 08162023

The following policy covers all types of intellectual property, including works protected by copyright, patent, and trade-secret laws. Although the following list is not exhaustive, it provides examples of the kinds of work the Policy addresses: including lectures, audio and visual materials, and pictorial or graphic works), websites, and software and databases.

Intellectual Property Rights

Clinical Pastoral Education International (CPEI) is committed to providing an environment that supports the learning, supervising-teaching, scholarship, and creativity of its supervisor-educators, students, and staff. Within this context, the Intellectual Property Rights Policy is intended to:

1. Encourage excellence and innovation in supervising-educating, scholarship, and creative activities by identifying and protecting the intellectual property rights of supervisors-educators (faculty), staff, students, and CPEI.
2. Encourage the notion that creative and scholarly works produced at CPEI should advance the state of knowledge and contribute to the public good.
3. Acknowledge and preserve the traditional property rights of scholars with respect to products of their intellectual endeavors (e.g., books, articles, manuscripts); and
4. Guide policy and process for commercial uses of intellectual property other than the traditional products of scholarly work.

Owner of Intellectual Property

1. CPEI owns the intellectual property when it has been commissioned by CPEI pursuant to a signed contract.
2. Individuals own intellectual when:
 - a. It has not been commissioned by CPEI via a signed contract.
 - b. It is unrelated to one's supervising-teaching responsibilities with CPEI.

Works Developed Within the Scope of a Signed Contract or Employment

1. Works related to an individual's job responsibilities, even if he or she is not specifically requested to create them, will belong to CPEI as works-for-hire. A copyright work is related to his or her job responsibilities if it is the kind of work he or she is employed to do and he or she does it, at least in part, for his or her use at work, or for use by fellow employees, his/her employer, or his/her employer's clients. The work should be performed substantially at work using work facilities or resources, but the employee's

use of personal time or other facilities or resources to create the work will not change its basic nature if it is related to the person's job as described above.

2. Works that have nothing to do with job duties will remain the property of the employee so long as he or she makes no more than incidental use of CPEI facilities or resources. For example, a CPEI staff member creates "a software program" on their own initiative to run on CPEI computers or website while they are using CPEI's resources and /or "on the clock" the copyright will belong to CPEI, even if no one asked the individual to create it and some of the work was completed at home on your own computer. However, CPEI is a non-profit corporation and as such would negotiate with the creator and come to a fair agreement.

Note: A program that you create that does not relate to your job, that neither you nor others use at work, and that you create on your own time would belong to you.

Policy 113: Copyright Laws

Policy: CPEI will comply with copyright laws.

Purpose: To provide guidance on use of copyright materials.

Scope: This policy applies to administrative staff, supervisors-educators and students.

Date Developed: April 2020

Date Reviewed: 12202020; 10012021; 01202023; 08162023

Copyright Guidance

1. "Copyright is a form of intellectual property law, that protects original works of authorship, including literary, dramatic, musical, and artistic works, such as poetry, novels, movies, songs, computer software, and architecture. Copyright does not protect facts, ideas, systems, or methods of operation, although it may protect the way these things are expressed." <https://www.copyright.gov/help/faq/faq-protect.html>
2. CPEI will abide by the Fair Use Law regarding the use of Intellectual and Legal Property. <https://www.copyright.gov/fair-use/more-info.html>
3. Mandated in the Fair Use Law mandates, Supervisor-Educators include:
 - a. Purpose: Does the use meet the educational objectives/outcomes of the portions used?
 - b. Amount: Are the materials used limited? Materials should be limited to brief works such as a single chapter of a book, an individual article from a journal, etc.
 - c. Effect: Does the use harm the current market value or sale of the copyrighted material?
 - d. Cited: Materials used in any resources (printed, web, etc.) must be clearly cited.

Requesting Permission

1. Request to use copyright materials/resources must be submitted and maintained on file.
2. Requesting permission identify:
 - a. The specific item requested for use.
 - b. The purpose of the use.
 - c. The author, title, and the number of copies.

Policy 114: Educational Curriculum Requirements and Qualifications

Policy: To declare the qualifications for the education curriculum.

Purpose: To provide guidance on following the requirements for the educational curriculum.

Scope: This policy applies to CPEI curriculum.

Date Developed: April 2020

Date Reviewed: 12202020; 10012021; 01202023.

Requirements

The Education Committee is responsible for the effective development of course materials to be used in live instructor-led, hybrid, and online e-learning formats. The Education Committee will work closely with the Instructional Designers and Course Content Developers and feedback from the CPEI Advisory Council.

Curriculum Development Manual

Education Committee

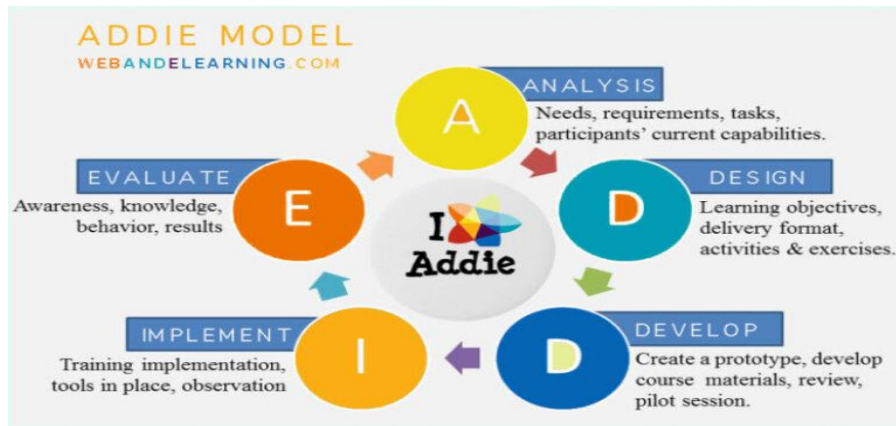
General Duties:

1. Ensure course content is current and the course objectives and outcomes and meets the needs of distance education.
2. Enlist Subject Matter Experts (SMEs) to assist in the development of course content.
3. Ensures needs assessments, post-course assessments and other evaluative tools are in place to determine training is being conducted according to standards.
4. Ensure changes are inserted into CPE handbooks, etc.
5. Ensure that the CPE Supervisors-Educators and Supervisory Students remain informed of changes or additions.
6. Recommend to the Executive Director and the Executive Council changes in curriculum or programs.
7. Assign a committee member to work closely with the Executive Director, Administrative Assistant, and the Communications Chair (Marketing) to ensure items such as the Course Catalog, Marketing Resources are current.

[CPEI Curriculum Development Manual.122023.pdf](#)

CPEI Instructional Designers and Course Developers:

CPEI uses the ADDIE Instructional Model of Learning. Below describes the specific duties of the instructional designers and course developers.



Instructional Designers:

Qualifications

1. Completion of a certificate or an educational degree course in instructional design.
2. Knowledge of adult learning theory and distance education.
3. Familiarity with educational technology and online learning and the **ADDIE (Analysis, Design, Development, Implementation and Evaluation)** instructional design.
4. Familiarity with e-learning tools and technologies, multimedia authoring tools.
5. Familiarity with pastoral care or pastoral counseling subject matter.
6. Critical and analytic thinking skills.
7. Demonstrate the ability to collaborate effectively and work as part of a team.

Tasks

1. Consult with subject matter experts (SMEs).
2. Envision courses that address the specific learning needs of the students.
3. Conduct research to ensure the course is meeting the needs (engaging the Advisory Council, CPEI faculty, reviewing other pastoral care cognate organizations, job requirements, etc.)
4. Map the changes to the Program Learning Outcomes (PLOs) and Curriculum Maps
5. Identify teaching aids and engagement activities.
6. Ensure the recommended changes will work for online learning and Populi.

Course Developers:

Qualifications

1. Completion of a certificate or an educational degree course in course development.
2. Familiarity with educational technology and online learning and the **ADDIE (Analysis, Design, Development, Implementation and Evaluation)** instructional design.
3. Experience developing course content and distance education.
4. Knowledge of learning management systems.
5. Familiarity with educational technology.
6. Familiarity with online learning
7. Familiarity with the subject matter of pastoral care or pastoral counseling.
8. Ability to communicate effectively in written form.

Tasks

1. Develop learning module content.
2. Assists in the recommendation of textbooks, journal articles, and other resources to assist faculty and students in meeting the course learning outcomes.
3. Develops assessment tools to measure students' progress.
4. Upload the course content in Populi.
5. Communicate to faculty of the changes.
6. Implement changes and evaluate.

CPEI Advisory Council

Mission: to review CPEI's curriculum, assignments, and evaluations/assessments for use with CPEI's Distance Education programs.

Composition: The advisory council consists of stakeholders with knowledge or experience in the practice or provision of pastoral care, pastoral counseling, and pastoral supervision and preferably with distance education. The list includes but is not limited to, representatives and employers who serve a variety of populations, including healthcare, nursing homes and adult living facilities, military, institutional, corrections, police/fire chaplaincy, and counseling ministries.

Duties:

1. Provide feedback on the needs of the population being served.
2. Identify current trends and issues in pastoral care, pastoral counseling, pastoral supervision and distance education.
3. Review summaries of CPEI reports, i.e., institutional effectiveness and end-of-course surveys.
4. Identify areas where additional training is needed to serve current and future populations.

Policy 115: Course Content Review

Policy: The Education Committee will review the course curriculum to ensure quality, relevance, currency, effectiveness, and applicability.

Purpose: To provide guidance for reviewing the course content/syllabi to ensure it maintains a level of quality and is current, useful, and applicable.

Scope: This policy applies to CPEI course designers.

Date Developed: April 2020

Date Reviewed: 12202020; 10012021; 01202023; 08252023

Actions

1. **April: (CPEI Advisory Council):** Receive feedback from (external stakeholders) to determine current needs and changes in the workplace.
2. **August: (Education Committee):** Review CPEI's course curriculum, course objectives and outcomes, post-course assessment summaries, and feedback from the Advisory Council in to determine gaps, needs, and revisions in the course content.
3. **October: (Education Committee):** Recommend changes, additions, or modifications to Executive Council (EC) for review and approval prior to submission of the CPEI Board of Directors.
4. **November: (CPEI Board of Directors):** Review the recommendations.
5. **January: (Technology Committee):** Make changes in CPE handbooks and LMS modules, distribute to all CPE Supervisors-Educators of approved changes and develop didactic or other educational resources.

Creation of New Programs or Courses

1. Use the CPEI Curriculum Development Manual as a guide.
2. Solicit feedback from prospective users, students, and others to determine the need for a new program or course.
3. Based on feedback, enlist subject matter experts (SMEs) to develop the new program or course.
4. Submit the revised program or course curriculum to the Executive Council (EC) for approval.
5. Train the new program or course for a minimum of 12 months.
6. Submit approval for accreditation.

Policy 116: Confidentiality and Password Protection

Policy: CPEI's policy regarding matters related to confidentiality, group relations and internship sites.

Purpose: To declare CPEI's policy related to matters of maintaining confidential information.

Scope: This policy applies to all students, faculty, and staff.

Date Developed: April 2020

Date Reviewed: 12202020; 12062021; 01202023; 06062023; 08172023

Maintaining Confidential Information

1. Students and supervisor-educators are expected to maintain confidential information that is shared in groups and individual supervision.
2. Students and supervisors-educators are expected to maintain confidential any information related to a patient, client, or other sensitive information while functioning in an internship or ministry setting.

Guidelines for Sharing Information

1. Students are expected to follow the guidelines and policies set forth by the institution in which the internship is occurring.
2. Supervisor-educators and supervisory education candidates are expected to share information as part of their supervisory work. Every effort should be sought to protect any specific or confidential information.
3. Advise of potentially high-risk situations that one becomes aware, which includes but is not limited to being aware of someone's suicidal thoughts, gestures, or attempts or a significant history of attempts; or clients who present with a history of, propensity for, or threats of violence and ensure the client is immediately referred for medical treatment.

Password Protection

1. Students can request a password reset should they forget theirs directly through Populi.
2. Faculty must submit a helpdesk ticket by emailing techsupport@cpei.us to have their password reset.
3. Password Protection Guidelines
 - a. Make sure the password is 12 or more characters long.
 - b. Include punctuation marks throughout.'
 - c. Include upper-case and lower-case letters throughout
 - d. Avoid memorable keyboard paths, like 123456.
 - e. Avoid using names.
 - f. Use a 2-step authentication method of security.
 - g. Change your password at least quarterly.

Policy 117: Student Integrity, Academic Honesty, and Academic Appeals

Policy: CPEI's policy regarding matters related to student integrity, academic honesty, and an academic appeal process.

Purpose: To declare CPEI's policy related to matters of student integrity, academic honesty, and an academic appeal process

Scope: This policy applies to all students, certification applicants, certified members of CPEI and staff.

Date Developed: April 2020

Date Reviewed: 12202020; 12062021; 01202023; 06062023; 06062023

Expectations

CPEI publishes clear, specific policies related to student integrity, academic honesty, and the right to appeal. Students are provided with a copy of this policy and are expected to read and sign the enrollment letter. Students are expected to conduct themselves with professional, personal, and ethical integrity in every aspect of CPE training. This includes following the CPEI Code of Professional Conduct and the expectations set forth in an internship site.

1. Be respectful and tolerant of differing opinions in the learning and internship environment.
2. Be informed of the course and internship expectations. If you do not know or understand, ask.
3. Be punctual and on time in all aspects of the CPE program, including the internship responsibilities.
4. Be prepared with the course expectations. Only present work that is current and not work from a previous course, e.g., verbatims, should not be any older than two weeks.
5. Demonstrate ethical and professional behavior in the course and internship activities.
6. Pay tuition and other fees on time.
7. Demonstrate academic honesty in the presentation of one's work, which includes not plagiarizing another person's work and reporting only the number of hours involved in an internship.
8. Maintain confidentiality with all material shared in and outside the group.

Actions for Non-Compliance

Students that are in non-compliance are subject to the following actions (see Process 218 for additional guidance).

1. Action 1: Discussion: Supervisor-educator will meet with the student to discuss areas of concern and a process for improvement. If this does not address the problem, move to Action 2.
2. Action 2: Probation: Place the student on probation for the remainder of the course. This includes providing the student with a written letter which becomes part of their written record in Populi. Address specific areas that need to be addressed. If the student does not meet the requirements as outlined, move to Action 3.

3. Action 3: Administratively Withdrawn: Students that fail to meet the course requirements for at least two weeks without a legitimate explanation that the supervisor-educator has approved may be administratively withdrawn. The refund policy will be reflected in the number of completed assignments.

Academic Appeals:

Students who feel feedback from the Supervisor-Educator in their final evaluation or grade may submit an appeal. The Ethics Committee is responsible for reviewing and determining the outcome of the appeal. [Academic Appeal Form](#)

Appeal Process:

Students can appeal the decision in response to the actions taken by the Supervisor-Educator.

The process is as follows:

1. Submit the reason for the appeal in writing to the supervisor-educator within 30 days of receiving a decision provided by the Supervisor-Educator.
2. The supervisor-educator will respond, in writing, within 30 days to the appeal.
3. If the student does not feel the response is acceptable, an additional appeal with all the previous correspondence may be filed with the Ethics Committee of CPEI for review. The ethics committee will respond within 30 days in writing to:
 - a. Support the new appeal.
 - b. Deny the appeal.

Policy 118: Satisfactory Academic Progress

Policy: CPEI's policy regarding successful movement through the educational process of CPE and Supervisory CPE.

Purpose: To declare CPEI's policy related to matters moving successfully through training.

Scope: This policy applies to all students and certified supervisors-educators.

Date Developed: April 2020

Date Reviewed: 12202020; 12062021; 01202023; 06062023; 08202023

1. **Educational Expectations:** A course of CPE and Supervisory CPE requires a minimum of 400 hours. Each course must be moved through progressively, which requires the completion of LMS Educational Modules. Courses are offered in 12 and 16-week terms.
 - a. Executive Director (Academic Director) will either conduct a review or appoint someone to review courses regularly to ensure students are meeting the requirements to be successful in the completion of the course requirements.
 - b. To review the work of the supervisors-educators in providing ongoing feedback to the students via written comments and the completion of course requirements.

2. **Successful Completion:** Course objectives and learning outcomes are designed for each course to assist in the student's ability and motivation to meet the learning goals during the course they are enrolled in.
 - a. Certificate of Clinical Pastoral Education Programs Course Completion Requirements
 - 1) Students must complete 100 clock hours of engagement and preparatory learning, and 300 clock hours of internship or the observation and practice of pastoral supervision.
 - 2) Students are expected to complete the program in 24 months.
 - 3) Grading is based on the ongoing submission of assignments in Populi and by the submission of the completed hours in an internship setting.
 - 4) CPEI places significant weight on the final evaluation for students as this is the culmination of what the student has learned or is learning. Therefore, after the course, all program students will submit a final evaluation, as will the supervisor-educator. Grades for the final evaluation are based on the scale below.

 - b. Certificate of Supervisory Education Programs Course Completion Requirements
 - 1) Students must complete 100 clock hours of engagement and preparatory learning, and 300 hours of reading, writing, and developing their theories and theology of pastoral supervision.
 - 2) Students are expected to complete the program in 24 months.
 - 3) Supervisory students must complete each course's requirements, e.g., SEC 600, before they are enrolled in the subsequent course, SEC 700.

- 4) Supervisory students are required to submit their Model of Pastoral Supervision at the end of SEC 800. It will be reviewed by their Training Supervisor-Educator and members of the Certification Committee to ensure they are on track. The failure to adequately address the course and certification requirements could result in the student having to repeat the course.

3. CPEI Assessments and Evaluative Tools

- a. The Internship Coordinator assessment. To provide feedback on the student’s development and to affirm the completion of internship hours.
- b. End of Course Survey- students are expected to complete an end-of-course survey which will assist the Education Committee in reviewing and making recommendations for improving the course curriculum, etc.

4. Course Learning Rubrics

Below are examples used in CPEI for CPE and SEC Courses: the type of grading rubrics used by CPEI.

CPE-100 Course

Criteria	Levels	Weight
Verbatim/Case Study Format -CPE 100	100% - 51% Exemplary The verbatim/case study clearly followed the required format. 50% - 0% Developing The student partially or did not follow the required format.	50%
Peer and Supervisor-Educator Feedback	100% Exemplary The student is learning to accept feedback on one's pastoral care from peers and supervisor-educator. 0% Developing The student appears to struggle in accepting feedback on one's pastoral care from peers and supervisor-educator.	50%
<u>Add criterion</u>	<u>Edit criteria weights Total</u>	100%

Supervisory Education Course (SEC 600)

Criteria	Levels	Weight
<p>Essay: Psychodynamic Theories of Human Development and Supervision</p>	<p>100% - 68% Exemplary The benefits and limitations of choosing a psychodynamic model of pastoral supervision were clearly articulated. 67% - 35% Acceptable The benefits and limitations of choosing a psychodynamic model of pastoral supervision were articulated. 34% - 0% Developing The benefits and limitations of choosing a psychodynamic model of pastoral supervision were partially articulated.</p>	<p>100%</p>
<p>Psychodynamic Theory and Group Supervision</p>	<p>100% - 68% Exemplary The essay clearly articulated issues that might surface in a CPE Group using the psychodynamic approach. 67% - 35% Acceptable The essay articulated issues that might surface in a CPE Group using the psychodynamic approach. 34% - 0% Developing The essay partially articulated issues that might surface in a CPE Group using the psychodynamic approach.</p>	<p>0%</p>
<p>Writing Style</p>	<p>100% - 68% Excellent The paper thoroughly reflects graduate-level academic voice and vocabulary. There are very few spelling and grammar errors. 67% - 35% Acceptable The paper partially reflects graduate-level academic voice and vocabulary. There are very few spelling and grammar errors. The paper exceeded the page requirements by 1-2 pages. 34% - 0% Developing The paper failed to reflect graduate-level academic voice and vocabulary. There were several spelling and grammar</p>	<p>0%</p>

Criteria	Levels	Weight
	errors. The paper exceeded the page requirements by 3 or more pages.	
<u>Add criterion</u>	<u>Edit criteria weights</u> Total	100%

Evaluations

- a. Mid-Course evaluation- is a written document following an approved format in which the student articulates how one has met or is meeting the learning goals established for the course. It is a time of self-reflection and the opportunity to receive feedback from one's peer group and supervisor-educator.
 - b. Final evaluation- is a written document following an approved format in which the student articulates how one has met the learning goals. The final evaluation must be submitted prior to the end of the course if the student expects to receive credit. A copy of the final evaluation will remain as part of the student's record.
 - c. Supervisors-Educators provide a copy of their final evaluation to students for review, approval, or if needed, comments from students.
 - d. Completed final evaluations shall be kept in the student's electronic file indefinitely in Populi.
- 5. Evaluative Policies:** CPEI focuses on the personal and professional development of the student through engagement in small groups and individual supervision, completion of weekly activities, and the student's participation and submission of clinical work.
- a. Supervisors-Educators provide ongoing formative feedback on a weekly basis and summative feedback at the end of the course via a final evaluation.
 - b. The evaluation tools are specific to each course, i.e., CPE 100, 200 are designed to provide students with a Likert scale response as to how the Supervisor-Educator feels the student met the learning outcomes as well as comments related to each outcome.
 - c. Grades are assigned based on the overall performance of the student.

Letter Grade	Points	Category	Evaluation
A+	100-96	Exemplary	Exceeded Learning Outcomes
A	95-91	Exemplary	Nearly Exceeded Learning Outcomes
B+	90-86	Competent	Met Learning Outcomes
B	85-81	Competent	Nearly Met Learning Outcomes
B-	80-76	Developing	Making Progress Toward Learning Outcomes
C+	75-71	Developing	Making Some Progress Toward Learning Outcomes

C	70	Minimally	Minimally Addressed Learning Outcomes
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- 6. Recognizing Completion:** Students will complete a final evaluation by the last day of the course and receive a final evaluation from the CPE Supervisor-Educator (faculty) member within 30 days of the completion of the course.
- A certificate of completion will be awarded to recognize the completion and the number of CEUs for each course.
 - A formal diploma will be awarded to students upon completion of the Certificate of CPE or Certification of Supervisory Education.

7. Absences

The completion of 400 hours per course is a requirement. Regular engagement in the learning process is essential to the successful completion of the course. No more than 2 unexcused absences for small group or individual supervision is allowed in order to receive credit for the course.

Regular participation includes limited but is not to:

- participation in small groups;
- individual supervision;
- the completion of online lesson and other required assignments;
- the completion of the required hours for an internship.

8. Actions for Non-Compliance

Students that are in non-compliance are subject to the following actions (see Process 218 for additional guidance).

- Action #1-Discussion: Supervisor-educator will meet with the student to discuss areas of concern and a process for improvement. If this does not address the problem, move to Action 2.
- Action #2-Probation: Place the student on probation for the remainder of the course. This includes providing the student with a written letter which becomes part of their written record in Populi. Address specific areas that need to be addressed. If the student does not meet the requirements as outlined, move to Action 3.
- Action #3-Administratively Withdrawn: Students that fail to meet the course requirements for at least two weeks without a legitimate explanation that the supervisor-educator has approved may be administratively withdrawn. The refund policy will be reflected in the number of completed assignments.

9. Readmission Process

Students who have been administratively withdrawn may resume enrollment in CPEI upon official readmission approved by the Executive Director. The student must email the Executive Director stating the reasons that he/she desires to be

readmitted and the actions one plans to take if readmitted. Readmission is subject to any changes made to the curriculum, tuition, or admission policies.

10. Appeal Process: Students can appeal the decision in response to the actions taken by the Supervisor-Educator. The process is as follows:

- a. Submit the reason for the appeal in writing to the supervisor-educator. The supervisor-educator will respond in writing within 30 days.
- b. If the student does not feel the response is acceptable, an additional appeal with all the previous correspondence may be filed with the Ethics Committee of CPEI for review. The ethics committee will respond within 30 days in writing to (Contact Admin. Asst for a correct email):
 - 1) Support the new appeal.
 - 2) Deny the appeal.

11. Actions of Supervisor-Educators

- a. Ensure that a course syllabus is provided in each course.
- b. Provide direct feedback to the students via the course requirements and whether the student is meeting the requirements. This can include written comments as well as the completion of the rubric.
- c. Notify students if they are falling behind and not meeting the course requirements and what is needed to catch up.

Policy 119: CPEI's Code of Professional Ethics

Policy: CPEI's policy regarding professional ethics for members and students.

Purpose: To set forth the ethical obligations for individuals certified or members of CPEI.

Scope: This policy applies to all students, certified supervisors-educators, and staff.

Date Developed: April 2020

Date Reviewed: 05042020; 12092021; 07012022; 01202023

CPEI's Code of Professional Ethics is expected to be followed by all students, certified supervisors-educators, and staff. Listed below are the standards, followed by the actions if someone violates one or more of these standards.

I. Common Standards for All (Students, Supervisors-Educators, Staff)

A. Relationship with Ecclesiastical and Professional Institutions

- 1.1 Maintain a good standing in their faith group.
- 1.2 Abide by the professional practice and teaching standards of the certification organization and the institution.
- 1.3 Do not directly or by implication claim professional qualifications that exceed actual qualifications or misrepresent an affiliation with any institution.

B. In Relationship with Self, Other Professionals, and the Community

- 2.1 Accurately represents one's professional qualifications and affiliations.
- 2.2 Exercises stewardship of resources entrusted to their care and employs sound financial practices.
- 2.3 Respect colleagues' and professionals' opinions, beliefs, and professional endeavors.
- 2.4 Seek advice and counsel from other professionals whenever it is in the best interest of those being served and make referrals when appropriate.
- 2.5 Provide expertise and counsel to other professionals in advocating for best practices in pastoral care and pastoral supervision.
- 2.6 Seek to establish collaborative relationships with other community leaders, pastoral relationships, and healthcare professionals.
- 2.7 Advocates for changes that would honor spiritual values and promote healing.
- 2.8 Communicate sufficient information to other professional members and/or pastoral Supervisors-Educators while respecting the privacy of those being served.
- 2.9 Ensure that personal behavior does not impair the ability to fulfill professional responsibilities or bring dishonor to the profession.
- 2.10 Clearly distinguish between statements made or actions taken as a private individual and those made as a member or representative of CPEI.
- 2.11 Monitor for signs of impairment-emotionally, physically, mentally, and spiritually and take the appropriate steps to address such signs.

C. In Advertising and Promotion

- 3.1 Represent one's competencies, education, training, and experience relevant to their practice of pastoral care, education, and supervision in an accurate manner.
- 3.2 Do not use any professional identification (business cards, letterhead, Internet, or telephone directory, etc.) that is false, misleading, fraudulent, or deceptive.

- 3.3 List and claim as evidence only degrees, certifications, and credentials that are earned from recognized educational institutions and/or CPEI Affiliate Organizations.

D. In Research

- 4.1 Engage only in research within the boundaries of their competence.
- 4.2 Ensure that research activities involving human participants are aware of the research question, design, and implementation.
- 4.3 Adhere to informed consent, including a clear and understandable explanation of the procedures, a description of the risks and benefits, and the duration of the desired participation.
- 4.4 Inform all participants of the right to withdraw consent and to discontinue involvement at any time.
- 4.5 Maintain sensitivity to the cultural characteristics of participants when conducting research.
- 4.6 Maintain confidentiality of all research participants and inform participants of any limits of that confidentiality.
- 4.7 Use any information obtained through research for professional purposes only.
- 4.8 Exercises professional ethics in attributing sources in their research and writing, thereby avoiding plagiarism.
- 4.9 Report research data and findings accurately.

E. In Relationship to the Social-Media

- 5.1 Recognize that the CPEI Code of Professional Ethics applies to the use of social media.
- 5.2 Engage in honest and respectful communication, both professionally and personally, in all Social Media activity.
- 5.3 Maintain a clear professional identity and refrain from developing inappropriate social media relationships with students, and other individuals.
- 5.4 Do not speak formally or informally on behalf of CPEI when engaging in personal social media activity unless authorized to do so.
- 5.5 Be mindful of the privacy and confidentiality of students and others and not engage in the use of social media in any way which may pose a conflict of interest or a breach of another's privacy and confidentiality.

Pastoral Supervisors-Educators, chaplains, members, and student members are aware that social media (for example, Internet, text messaging, email, Twitter, Facebook, blogs, YouTube, LinkedIn, as well as all other forms of electronic/digital communication) influences and informs our daily life and work. We recognize that the World Wide Web records everything that is posted anywhere, anytime and retains this information indefinitely.

II. Standards for CPE Supervisors-Educators and Supervisory Education Students

A. In Relationships with Students and Clients

- 1.1 Pastoral Supervisors-Educators understand that "students, clients, patients or parishioners" (refer to the same type of persons served and will be used interchangeably throughout this document) and describe any individual to whom they are providing pastoral supervision or pastoral care.

- 1.2 Speak and act in ways that honor the dignity and value of every individual.
- 1.3 Provide care and supervision that is intended to promote the best interest of students and clients and to foster strength, integrity, learning, and healing.
- 1.4 Demonstrate respect for the cultural and religious values of those they serve and refrain from imposing their own values and beliefs on those served.
- 1.5. Acknowledge the imbalance of power in the Supervisor-Educator and student relationship and refrain from exploitation of that imbalance.
- 1.6 Avoid or correct any conflicts of interest or appearance of conflicting interest(s).
- 1.7 Refrain from any form of exploitative behavior, sexual misconduct, sexual harassment, or sexual assault in relationships with students and clients.
- 1.8 Refrain from any form of harassment, coercion, intimidation or otherwise abusive words or actions in relationships with students and clients.
- 1.9 Safeguard the confidentiality of students and clients when using materials for educational purposes or written publications.
- 1.10 Respect the confidentiality of information entrusted to them by students and clients when communicating with family members or significant others except when clergy is required for necessary treatment, granted by client permission, for the safety of any person or when required by law.
- 1.11 Understand the limits of individual expertise and make referrals to other professionals when appropriate.
- 1.12 Provide clear expectations regarding responsibilities, appointment schedules, fees, and payments.
- 1.13 Complete assessments and evaluations for students according to the standards.
- 1.14 Do not represent the ability to provide supervision beyond one's appropriate level of education and certification.
- 1.15 Monitor for signs of impairment-emotionally, physically, mentally, and spiritually and take the appropriate steps to address such signs.

B. Video/Audio/Distance Learning Standards

- 2.1 The use of technology (computers, webcams, etc.) is accepted as an industry standard in a variety of professional disciplines, including CPEI Affiliate Organizations. Pastoral Supervisors-Educators choosing to make use of such a method are to ensure, at a minimum, that participants are knowledgeable as to what is required for participation, how to utilize the required programming, persons are informed when sessions are recorded, and address matters of confidentiality. In addition, the risks and benefits of such use need to be identified.
- 2.2 Pastoral Supervisors-Educators are authorized to use cameras and/or other technological equipment to record individual and/or group peer sessions for supervision and training purposes only. Recorded data will be maintained only to serve the purpose of supervision and certification, after which it will be destroyed.
- 2.3 Pastoral Supervisors-Educators will safeguard client rights and confidentiality of recordings in a secure setting.

Policy 120: Marketing and Advertisement

Policy: CPEI's policy regarding marketing and advertising.

Purpose: To set forth the marketing and advertising guidelines for CPEI and Affiliates.

Scope: This policy applies to all students, certified supervisor-educators, staff, and Affiliates.

Date Developed: April 2023

Date Reviewed: 04272023.

CPEI's Policy for Marketing and Advertising provides guidance and expectations for all marketing and advertising involving CPEI, Affiliates, and membership.

CPEI and its Affiliates are encouraged to publicly market and advertise programs and information that increases the visibility and highlights the quality of training offered. All Affiliates and CPEI faculty, students, and staff must follow the guidelines listed below.

Affiliates and Membership

1. Never claim CPEI or its Affiliate Organizations are accredited, certified, recognized, or endorsed by outside organizations unless the information has been verified and announced by CPEI.
2. Never claim CPEI or Affiliate Organization is in the process of being accredited, certified, recognized, or endorsed by outside organizations.
3. Do not directly or by implication claim professional qualifications that exceed actual qualifications or misrepresent an affiliation with any institution.
4. Accurately represents one's professional qualifications and affiliations.
5. All publicity must be truthful, factual, accurate, and high quality.
6. Represent one's competencies, education, training, and experience relevant to their practice of pastoral care, education, and supervision in an accurate manner.
7. Do not use any professional identification (business cards, letterhead, Internet, or telephone directory, etc.) that is false, misleading, fraudulent, or deceptive.
8. List and claim as evidence only degrees, certifications, and credentials earned from recognized educational institutions and/or CPEI Affiliate Organizations.

Communications Committee

1. CPEI's Communication Committee is comprised of individuals with a background in one or more of the following areas: advertisement and promotion, graphics, editing, etc.
2. CPEI Communications Committee is responsible for providing guidance to Affiliates and membership regarding marketing or advertising activities.
3. All materials representing the CPEI Organization must be coordinated and approved by the Communications Committee.
4. Refer any questions regarding marketing and advertising to the Communications Committee.

Promotional Activities

1. CPEI is committed to remaining neutral in relationships to promoting social, religious, or ethical issues.

2. CPEI is committed to providing “quality, inclusive, and life-transforming Clinical Pastoral Education: as stated in its mission statement.
3. Certified members, students, and supervisors-educators will refrain from the promotion of social, religious, or ethical issues in relationship to CPEI.

Policy 121: Affiliate Organizations

Policy: CPEI's policy for CPEI Affiliate Organizations.

Purpose: To set forth guidelines for Affiliate Organizations, approval process, renewal, and expectations.

Scope: This policy applies to all Affiliate Organizations.

Date Developed: April 2023

Date Reviewed: 04292023 06062023

CPEI's Policy for Affiliates Organizations (AO) outlines the process for affiliating with CPEI, expectations, fees, compliance requirements, and the annual renewal process.

Definitions/Descriptions

1. Affiliate organizations are for-profit, non-profit, limited liability corporations, or other legal entities.
2. A certified CPE Supervisor-Educator or CPE Training-Supervisor-Educator staffs an Affiliate Organization.
3. Affiliate organizations assist CPEI in the accomplishment of its mission. It provides the faculty and internship settings.

Affiliate Application Process

1. Affiliate Organizations (AO) desiring to affiliate with CPEI will complete an Affiliate Organization Application and pay the application. [Affiliate Organization Application](#)
1. Annual renewal fees are established by the Finance Committee.
2. Prorated Fees may apply for the first year's Annual Fees.
 - a. Applications submitted after April 1, but before July 1 will receive a 1/4 prorated fee.
 - b. Applications submitted after July 1, but before October 1 will receive 1/2 prorated fee.
 - c. Applications submitted after October 1 but before January 1 will receive 3/4 prorated fee.
3. Chair of CORE: Upon submission of the application, the Chair will:
 - a. Review the application and submit the Approve/Reject approval form in Populi, which will provide the terms/fees form for the applicant to submit.
 - b. If approved, the Chair will:
 - Create a Folder in the Populi CORE Group.
 - Download the MOU and other required documents and upload them to the AO Folder in the CORE Group.
4. Tech Support: Upon approval and the Terms and Fees Form will:
 - a. Create a campus for the newly approved Affiliate in Populi
 - b. Create a unique CPEI Application for the newly approved AO.
 - c. Email the new Affiliate Organization the CPE and/or SEC Application.
5. Administrative Assistant: Upon approval of the Approval/Reject Form will:
 - a. Submit the approval letter via Populi.
 - b. Review the application date for a prorated annual fee.
 - c. Submit an invoice to the newly approved Affiliate.

- d. Notify the CORE Chair once payment has been received.
- e. Once payment has been received, create a link on the CPEI Website.
- f. Provide the Affiliate Organization with a certificate.

Annual Requirements

1. CPEI Supervisors-Educators will complete the annual CPE Supervisor-Educator contractual form. [Supervisor-Educator Annual Contract.pdf](#)
2. Affiliate Organizations will submit renewal of annual fees. No discount fees are provided for the Annual Renewal fees.

Maintaining Records and Compliance

1. CORE maintains records of Affiliate Organizations in the Populi Group folder.
2. A CPEI Affiliate Organization Memorandum of Understanding (MOU) is required to be on file.
3. Compliance Requirements
 - a. New Affiliate Organizations must submit the Memorandum of Understanding (MOU) and fee payment within 30 days of the approved application. Variances to the requirement will be submitted in writing (email) to CORE@CPEI.US stating reasons for non-compliance.
 - b. Affiliate Organizations Annual Renewal Fees are due December 1- no discounts are provided for annual renewals.
 - c. Affiliate organizations failing to meet this requirement by December 31 will be placed on probationary status.
 - 1) Late Fees: a 10% late fee is added to the annual fee.
 - d. Discontinuation of Affiliate Organizations.
 - 1) Affiliate Organizations that fail to submit the MOU or required annual supervisor-educator report after 60 days of the due date will have its affiliation status revoked until such times that the AO is brought into compliance.
 - 2) Affiliate Organizations that fail to submit annual fees within 60 days of the due date will have their affiliation status revoked.
 - 3) Affiliate Organizations with revoked status will have student applications via Populi discontinued.
 - e. Avoiding Probation or Discontinuation of Affiliate Organization Status. A letter emailed to CORE@CPEI.US with stated compliance requirements clearly articulated can avoid the discontinuation of probation of AO status.

Policy 122: Credentialing for Board Certification for Chaplains and Supervisor-Educators

Policy: The credentialing policies outline the requirements upon completion of CPEI Certificate Programs.

Purpose: To identify the requirements and the procedure for applying for credentialing.

Scope: This policy applies to individuals completing the Certificate Programs for CPEI.

Date Developed: March 2024

Date Reviewed:

Disclaimer

The completion of a CPEI Certificate Program does not guarantee employment or credentialing as a Board-Certified Chaplain or a Supervisor-Educator.

Candidates for credentialing with Clinical Pastoral Education International (CPEI) must review the Credentialing Manual for additional requirements.

Educational Requirements

1. Chaplain Educational Requirements
 - a. Board Certified Associate Chaplain (BCAC)
 - b. A bachelor's degree or educational equivalent
 - c. Four courses/units of CPE (1600 hours)
2. Board Certified Chaplain (BCC)
 - a. A 72-hour graduate theological degree or equivalent.
 - b. Four courses/units of CPE (1600 hours).
3. Supervisor-Educator Educational Requirements
 - a. CPEI Supervisor-Educator (CPEI-SE)
 - b. A 72-hour graduate theological degree or equivalent
 - c. Four courses/units of Supervisor-Educator Candidate Education (1600 hours)

Procedure for Applying

1. Students may apply for credentialing (BCC, BCAC, CPEI-SE) within one year of completing CPE 400 or SEC 900.
2. After completing SEC 900, Supervisory Candidates may teach a maximum of one CPE course under the supervision of a Training Supervisor Educator.
3. Students may only repeat an SEC course with credentialing committee approval.

Process 201: Measuring Educational Effectiveness and Other Key Dates

Purpose: To evaluate the effectiveness of CPEI as an organization in the accomplishments of its overall vision and mission.

Responsible: Administration

Date Developed: April 2020

Date Reviewed: 12202020; 10012021; 11012022; 0122023; 06062023

Action Steps

1. The Executive Council (EC) is responsible for ensuring the overall effectiveness of CPEI Organizations. Feedback from various committees will assist in this process.
2. Specific processes or actions include an annual review of the mission, strategies for accomplishing the mission, and key indicators as well as the assessment results.

Process 202: Periodic Internal Review

Purpose: To evaluate the continuous quality of the overall CPEI program and the consistent application of the standard.

Responsible: Administration and Assigned Committees

Date Developed: April 2020

Date Reviewed: 12202020; 1012021; 01202023

Action Steps

1. The Education Committee will:
 - a. **Periodically:** Ensure that a process exists to evaluate and assess the students and others as applicable.
 - a. **October:** Evaluate students' post-course assessments, course curriculum teaching resources, etc. and submit their findings to the Executive Council (EC).
 - b. Ensure the applicable handbooks are updated.

2. The Committee on Review and Effectiveness will:
 - a. **January:** Review and submit a report to the Executive Council (EC) regarding the CPEI Policies and Processes Exam.
 - b. **February:** Evaluate and submit a report to the CPEI Board of Directors regarding CPEI Affiliates.

3. The Ethics and Compliance Committee will:
 - a. **January:** Report to the Executive Council (EC) results of the annual CEUs requirements.
 - b. **March:** Review and update policies and processes and provide a report to the Executive Council (EC).

4. Technology Committee and Admin. Assistant will:
 - c. **January:** ensure CPEI Handbooks, Course Catalog are updated and distributed to supervisors-educators and students.
 - d. **January:** ensure academic dates are posted on the website.

Process 203: Dissemination of Anti-Discrimination & Harassment Information

Purpose: To provide guidance on the review and dissemination of anti-discrimination and harassment information.

Responsible: Ethics Committee, Admin. Asst. and Communications (Marketing) Comm.

Date Developed: April 2020

Date Reviewed: 12202020; 10012021; 01202023

Action Steps

1. Ethics Committee:
 - a. **March:** review CPEI's Policies and Processes, to include the Policy on "Anti-Discrimination and Harassment" is current.
2. Administrative Assistant and Communications (Marketing) Committee
 - a. **March:** Ensure current promotional resources, website, etc., have updated and relevant information regarding this guidance.

Accountability: Failure to comply will result in a referral to the CPEI Administrative Staff for guidance.

Process 204: Instructional and Learning Resources

Purpose: To ensure that instructional and learning resources are available for Educators, learners, and staff.

Responsible: Certified Supervisors-Educators and CEU Instructors

Date Developed: April 2020

Date Reviewed: 10032020, 11032020; 10012021; 01202023

Action Steps

Requirements prior to the training activity.

1. Ensure learning resources and equipment are available.
2. Ensure student handbooks and CEU resources have adequate learning outcomes and required forms.
3. Ensure students have been informed of any technological requirements.
4. Ensure technological requirements are available and in good working order as needed.
 - a. Computer
 - b. Projector
 - c. Microphone and speakers.
 - d. Access to Wi-Fi has been arranged.
 - e. Information on access to learning management systems resources, i.e., library, LMS.
 - f. Certificates are prepared.
 - g. The room is secured and prepared.
 - h. Technological resources are prepared and checked.
 - i. The syllabi have been developed, disseminated, and discussed.

Steps for presentation at events or activities.

1. The students or participants have been informed of the requirements for earning credit and IACET CEUs.
2. Attendance is required and maintained, especially for CEU activities.
3. Participants sign a consent form if the event is recorded.
4. Certificates of completion are awarded CPEI and IACET logos.

Accountability: Failure to comply will result in a referral to the CPEI Administrative staff for guidance.

Process 205: Environment Supports Learning Outcomes

Purpose: To ensure the learning environment supports the achievements of learning outcomes.

Responsible: Certified Supervisors-Educators and CEU Instructors

Date Developed: April 2020

Date Reviewed: 10032020, 11032020; 10012021; 01202023

Action Steps

Classroom Preparation

1. A confidential classroom is secured.
2. Seating and tables are available and formed in a fashion that facilitates interaction.
3. Temperature set to accommodate maximum learning.
4. AV or Technological equipment is in working condition (i.e., Computer, Sound System, Projector, Screen, etc., Wi-Fi, accessible).
5. Teaching Resources are prepared.

Virtual/Distance Learning Requirements

1. Technological requirements for the Educator and Students are disseminated prior to the event:
 - a. Computer with a web-camera
 - b. Speakers/microphone
 - c. Access to Wi-Fi with a high-speed internet connection
 - d. Access to a telephone if Wi-Fi connection is interrupted.
2. Handbook and syllabus are disseminated via email, CPEI's Record-Keeping folders, or other forms and discussed.

Accountability: Failure to comply will result in a referral to the CPEI Administrative staff for guidance.

Process 206: Dissemination of Course Information

Purpose: To ensure the learning environment supports the achievements of learning outcomes.

Responsible: Certified Supervisors-Educators and CEU Instructors

Date Developed: April 2020

Date Reviewed: 10032020, 11032020; 10012021; 01202023

Action Steps

1. CPEI and Affiliates will disseminate information to the public via the website, brochures, etc., which includes but is not limited to the following:
 - a. Description of training offered.
 - b. Acceptance and application requirements.
 - c. Tuition and payment plans
 - d. Learning outcomes.
 - e. Requirements to earn a course of training.

3. Student enrollment letters will contain the minimum information.
 - a. Tuition, financial requirements, and the cancellation and withdrawal policy.
 - b. Requirements to earn credit for CPE / IACET CEUs
 - a. Student rights and responsibilities.
 - b. Technology support, course requirements,

4. Discuss the following during Day 1 of each course.
 - a. Devotional
 - b. Introductions
 - c. Review the student handbook.
 - d. Discuss Course Objectives/Outcomes.
 - e. Discuss requirements for earning credit.
 - f. Discuss requirements for attendance (group/individual) supervision.
 - g. Review the course syllabus and assignments.
 - h. Discuss internship (clinical) assignments.

Accountability: Failure to comply will result in a referral to the CPEI Administrative staff for guidance.

Process 207: Student Support

Purpose: To ensure that support services are available to the students before, during, and after the CPE learning event.

Responsible: CPEI Administrative Staff, Certified Supervisors-Educators, and Technological Support

Date Developed: April 2020

Date Reviewed: 10012021; 01202023

Action Steps

1. The administrative staff ensures that information regarding the program, etc., is current on all communication resources, i.e., website, promotional materials, etc.
2. Administrative staff responds to admissions, enrollment, Populi, Jotforms, and Transcripts within 24-48 hours.
3. Students that have questions may submit an email to their supervisor-educator
4. Supervisors-Educators respond to assignment submissions, assessment requirements, grades, etc.) within 48 hours.
5. Populi Support:
 - a. CPEI Support is available Monday through Friday, 8 a.m.-5 p.m. Central Time, excluding U.S. Holidays by submitting the request using this email- **techsupport@cpei.us**. A minimum of 24 hours is required before a response may be provided.
 - b. Populi Support is available on a limited basis Monday through Friday, 6 a.m. to 5 p.m. Pacific Time, excluding U.S. holidays.
2. Library access and support is available Monday through Friday, 8 a.m.-5 p.m. Eastern Time, excluding U.S. Holidays by submitting the request using this email **gnitpc@gmail.com**. A minimum of 24 hours is required before a response may be provided.

Accountability: Failure to comply will result in a referral to the CPEI Administrative staff for guidance.

Process 208: Administrative Support for Supervisors-Educators

Purpose: To ensure that adequate administrative support is available for Supervisors-Educators

Responsible: CPEI Administration and CORE

Date Developed: April 2020

Date Reviewed: 10012021; 01202023

Action Steps

1. The Executive Director and the Administrative Assistant are available to ensure support to the Supervisors-Educators prior to, during, and after learning activities. CPEI committees are also available to provide support and guidance.
2. Types of Support:
 - a. Student and Supervisor-Educator Handbooks are current.
 - b. Didactic teaching resources.
 - c. Feedback from post-course assessments.
 - d. Ethics consultation.
 - e. Library resources.
 - f. Supervisory Connections Groups.
3. Ongoing Support
 - a. The Education Committee will provide a plan for the development of didactic/teaching resources for supervisors and continuing education activities to ensure compliance with CPEI on an annual basis (See CPEI Curriculum Development Manual).
 - b. The Education Committee will provide feedback at least once each quarter to the supervisors per the end of course surveys.
 - c. The Ethics and Compliance Committee will provide ongoing consultation to supervisors and administration regarding potential ethical violations, handling student appeals, and developing and posting insights to supervisors and chaplains regarding ethical issues.
4. Professional Liability Insurance coverage is provided.

Process 209: Annual Performance Review for CPEI Staff and Faculty

Purpose: To provide guidance for the annual performance review for CPEI staff and Faculty.

Responsible: CPEI Executive Director, CPEI Chair for Board Members, CPEI Staff, and Faculty Members (CPEI Associate Supervisor-Educator (CPEI-ASE), CPEI Supervisor-Educator (CPEI-SE), and CPEI Training Supervisor-Educator (CPEI-TSE).

Date Developed: April 2020

Date Reviewed: 092920; 121720; 10012021; 01202023; 0312024

Action Steps

CPEI Annual Performance Review Process

1. CPEI Executive Director

- a. **January** -The executive director's performance will be reviewed by the CPEI Board of Directors (CPEI BODs).
- b. Process:
 - 1) Members of the Board will submit an assessment of CPEI's Executive Director to the CPEI Chair, Board of Directors. The CPEI's Chair, Board of Directors will compile a summary of the Likert Scale results and comments to be provided to the CPEI Executive Director no later than the end of February.
 - 2) To protect the confidentiality of the CPEI Board Members' evaluative assessment and comments, the CPEI Chair, Board of Directors will email the following PDF to the Board Members. [CPEI Ex. Director Annual Performance Review.docx](#)

2. CPEI Staff Annual Performance Review

- a. New staff will be evaluated at the end of the 90-day performance review; if either party feels this is not a good fit for CPEI, 90-day notice will be given.
- b. Annual Performance Reviews are in development by the CPEI Personnel Committee. Once completed they will be included in the Staff and Faculty Manual.

3. CPEI Faculty

- a. **September**
 - 1) Faculty members will complete the Policies and Processes Exam.
 - 2) Faculty members will complete an annual review of the Annual Recruitment requirements.
 - 3) The training format will include, but not be limited to face-to-face, video, and a quiz. The required links for training will be provided prior to the month the training is required.

b. **November**

- 1) Faculty members will complete the [Faculty Annual Performance Review](#)
- 2) The performance review is created in Populi and can be accessed through the link above.

4. CPEI Faculty Performance Review

- a. The Chief Academic Officer (CAO) or Executive Director will complete an annual performance review for each active faculty member in November. [CPEI Chief Academic Officer Annual Faculty Performance Review](#).
- b. The format for the Performance Review is a Likert scale with a section to identify strengths and areas for improvement.
Items to be reviewed include but are not limited to:
 - 1) Participation in faculty and staff meetings or reviewing the videos.
 - 2) Providing written feedback to students in Populi.
 - 3) Contributing to the overall success of CPEI's Mission
 - 4) Uploading students final evaluations within two weeks at the end of the term and finalizing the course.
 - 5) Providing clear and comprehensive feedback and guidance to students.
 - 6) Adhering to CPEI's policies and processes.
- c. Upon completion of the review, a copy of the performance review form will be maintained in the faculty member's Populi personnel file. Faculty members will be notified of the review completion.
- d. The Chief Academic Officer (Executive Director) then schedules a meeting within two weeks to meet with each faculty member to share feedback and address any areas for improvement.
- e. In addition to the annual review process, CPEI will continually observe and address faculty performance. These will occur, but are not be limited to:
 - 1) Staff and faculty training is conducted quarterly, during which any issues that arise can be addressed.
 - 2) Student end-of-course evaluations.
 - 3) Results from the annual Indirect and Direct Outcome Assessment process.

5. Maintaining Records

- a. Copies of Personnel Annual Reviews will be maintained in the Personal File for Faculty members in Populi.
- b. Records of completion for training activities, i.e., annual policies and process exam, recruitment training, etc. will be maintained in an Excel File in CPEI's Administrative Group Folder.

Process 210: Professional Development of Supervisors-Educators and Education Committee

Purpose: To ensure that the Ed. Committee and Supervisors-Educators continue to develop professionally.

Responsible: CPEI Administration, Certification Committee

Date Developed: April 2020

Date Reviewed: 09302020; 10012021; 01202023

Action Steps

1. Professional Development (Continuing Education) Requirements
 - a. The Certification Committee handles developing and assisting in the professional development of certified members.
 - b. The Ethics Committee is responsible for ensuring certified members meet the annual requirements for professional development (continued education).
2. Professional Development Opportunities
 - a. The Education Committee members are responsible for completing a minimum of 1-2 courses annually for professional development relative to course development, design, assessments, etc.
 - b. CPEI Supervisors-educators are responsible for a minimum of 1.5 IACET (15 Contact hours) annually. Recommended requirements include:
 - 1) Supervisory Skills/Competencies
 - 2) Ethics and Supervision
 - 3) Multiculturalism and Supervision
 - 4) The remaining hours should supplement the continuing professional development as a Supervisor-Educator.
 - c. Certified chaplains are responsible for a minimum of 1.0 IACET (10 Contact hours) annually.
3. Recording of Professional Development.
 - a. A CEU completion report is available via this link- [CPEI Annual Continuing Education Report Form](#)
 - b. The annual is due in December.
4. Funding
 - a. Supervisor-Educators are responsible for the funding of their professional development hours.
 - b. CPEI has limited funds annually to assist members of the Education Committee to obtain related specifically to the course design, development, assessments, etc.

Accountability: Failure to comply will result in a referral to the CPEI Administrative staff and/or the Executive Council (EC).

Process 211: Formal Needs Analysis

Purpose: To describe the process of conducting a needs assessment and identifying gaps in the educational process.

Responsible: Education Committee

Date Developed: April 2020

Date Reviewed: 093/2020; 10012021; 01202023

Action Steps

1. Needs Assessment: A systematic process to gather the information that is appropriate and sufficient to develop an effective educational program that will address the groups' needs and wants (gap).
2. Gap: the difference between the current state of "What is" and the desirable or achievable state of "What should be or desired."
3. Methods for Gathering Information for the Needs Assessment:
 - a. Indicator 1A: Student post-course assessments provide data on curriculum content.
 - b. Indicator 2A: Assessment of students meeting the learning outcomes as represented by scores on final evaluations.
 - c. Indicator 2C: Graduation rate of students completing the CPE and Supervisory Educational Programs.
4. Analysis:
 - a. Student post-course assessments are analyzed for patterns with a benchmark of 80%.
 - b. Assessment of students meeting the learning outcomes as represented by scores on final evaluations. Benchmark 80%
 - c. Graduation rate of students completing CPE and Supervisory Education Certificate Programs are analyzed Benchmark: 80%
5. Sharing Results and Recommendations
 - a. The Education Committee will collect and analyze the data from the assessments and recommend to the Executive Leadership Committee (ELC) changes and a date for implementation.
 - b. Education Committee will communicate to all CPE Supervisor-Educator with a specified date/time for the new recommendations to become active.
6. Accountability: Failure to comply will result in a referral to the CPEI Administrative staff.

Process 212: Content Supports Learning Outcomes

Purpose: To ensure that the course content/syllabi logically support the learning outcomes

Responsible: Education Committee

Date Developed: April 2020

Date Reviewed: 10072020; 10012021; 01202023

Action Steps

1. Education Committee is responsible for:
 - a. Evaluating course content to ensure it addresses the learning course outcomes.
 - b. Enlisting Subject Matter Experts (SMEs) to assist in the development of course content to address the learning outcomes.
 - c. Ensuring needs assessments, post-course assessments and other evaluative tools are in place to determine training is being conducted according to standards.
 - d. Reviewing and analyzing needs assessments, post-course assessments, and other evaluative tools to determine if changes are needed and recommend changes to the EC.
2. CPE Supervisors-Educators are responsible for:
 - a. Instructing students.
 - b. Preparing syllabi that align with the course learning outcomes.
 - c. Delivering didactic materials that embrace student learning.
 - d. Recruiting subject matter experts to present didactic materials related to specific learning outcomes.
 - e. Facilitating individual and group supervisory sessions.
 - f. Completing final evaluations.
 - g. Ensuring post-course and internship assessments are completed.
 - h. Allowing for and encouraging student discussion and questioning.
 - i. Integrating different methodologies that relate to the different students' learning styles (cognitive, visual, auditory).
 - j. Encouraging students to take ownership of their learning goals/objectives and apply the learned skills in their clinical practice.
3. Principles to Consider in the Development of Content and Outcomes:
 - a. Use of the Curriculum Development Handbook.
 - b. Nature of the learning experience.
 - c. Content is established on principles of adult education and the action/reflection/action method of learning.
 - d. Supervisor-Educator's teaching style.
 - e. Supervisors/Educator's knowledge of students includes their religious, spiritual, educational, social, and cultural backgrounds.
 - f. Awareness of the learning objectives and outcomes.
4. Recruit Subject Matter Experts (SME) to:
 - a. Review topics of interest identified by the students in the post-course assessments.
 - b. Discuss new material on relevant topics with Supervisors-Educators.

- c. Select SMEs to develop content to match learning outcomes.
- 5. Share updated content with Supervisors-Educators to be implemented and evaluated.
- 6. Continually adjust the didactics and other resources as necessary based on the feedback and continue the process again.
- 7. Accountability: Failure to comply will result in a referral to the CPEI Administrative staff.

Process 213: Content Supports Learning Outcomes

Purpose: To ensure course and instructional resources are current and address the student's learning needs.

Responsible: Education Committee

Date Developed: April 2020

Date Reviewed: 10072020; 10012021; 10012022; 01202023

Action Steps

CPEI's curriculum and learning outcomes are supported by the following activities.

Reflective and Relationship Learning Environment

CPE provides a reflective and relational learning environment that fosters personal and pastoral development. Such an environment involves mutual trust, respect, openness, challenge, support, and at times, confrontation in a respectful and caring manner. Students are expected to be self-directed and explore one's theological framework as it applies and is integrated into one's abilities to practice compassionate pastoral care.

Students are expected to develop a learning contract that is appropriate to their learning needs and congruent with CPEI's Objectives and Learning Outcomes. The learning goals are to be unique to their specific learning issues and measurable. In some cases, these may be modified at mid-course as one gains new insight.

Model and Method of Adult-Learning

CPEI's CPE program is established on the Action-Reflection model of learning. The action-reflection model of education allows practical theology to be integrated into the lives of individuals to be able to provide meaningful and transformative pastoral care. Although several models exist to describe this action, the work of Kolb identified four key elements in relation to this transformative process. Learners, if they are to be effective, need four distinct kinds of abilities—Be able to involve themselves fully, openly, and without bias in new experiences (CE). They must be able to reflect on and observe their experiences from many perspectives (RO). They must be able to create concepts that integrate their observations into logically sound theories (AC), and they must be able to use these theories to make decisions and solve problems (AE). (p. 1065)

Although several methodologies can be used, verbatim is one of the most practical means of focusing on this process. This method includes:

1. Describe the ministry that occurred.
2. Analyze one's actions within the context of one's ministry setting, to include the unique cultural, ethical, and relational dynamics.
3. Relating one's actions and ministry to one's faith practices (theology), as well as the social and behavioral issues present.
4. Describe what learning has occurred and what challenges may have surfaced. What personal, professional, and pastoral insights surfaced?

5. Plan for further actions considering what has been learned. Decide what has been learned and what the learning means for how the group works.
6. Repeat the process.

Syllabus

Students are provided with a syllabus for each course with an example in the Appendices. Supervisors-Educators have the right to modify the syllabus to address the group's learning needs.

Supervision and Collaborative Learning

CPE utilizes a process of supervision and collaborative learning in which the CPE student meets regularly with one's peers and supervisor-educator to maximize one's growth and development. In addition to the peer group experience, students also meet one on one with the supervisor-educator to explore relationship learning and the ability to identify one's learning needs for further discussion.

Core Components of the CPEI Learning Environment

- a. **Internship and Hours**
Each student must secure an internship setting in which a minimum of 300 hours or 75% Distance Education occurs. Hours will come from pastoral responsibilities in a ministry setting, e.g., healthcare setting, congregational and parish-based settings, law enforcement, fire, military, or other related settings. An Internship Manual is provided in this handbook for further guidance.
- b. **Individual Learning Contracts or Covenants**
The learning contract or covenant is a time-honored process in which students are expected to develop a learning contract for each course. The learning contract is an expression of one's learning goals, which must be written using the prescribed form, and presented to the CPE supervisor-educator during the first weeks of each course. In writing your learning goals, it may be helpful for you to think of "What do I hope to learn? What are my personal and professional learning needs and goals? How will my learning be measured and evaluated?"
- c. **Didactics and Teaching Modules**
CPEI uses several formats for students to learn from formal presentations such as didactics, self-awareness activities, videos, book reports, etc. Potential didactics topics include:
- d. **Self-Awareness Activities**
CPEI uses several means of aiding students in developing self-awareness, personality assessments, genograms, etc.
- e. **Verbatim or Case Presentations**

Verbatim is a long-standing learning methodology in CPEI in which students are to describe their ministry encounters in a structured way for use during individual and/or group supervision. The written verbatim captures the conversation and ministry events that occur during a pastoral visit. A specific format will be provided below.

f. Reflections

Verbatim Reflection: After a verbatim case presentation, the student will write a personal reflection on the feedback provided by peers and Supervisor-Educator and present it at the next formal group session.

Weekly Reflection: The weekly reflection is a maximum of 1-2 pages paper that focuses briefly on the previous week's experiences and is used to evaluate its significance for one's learning process. Students are to share feelings and concerns that impact them as a person and as a pastoral care provider. The paper should be personal and candid. Areas that may be reviewed include relationships, teaching-learning process, self-awareness, theology/spiritual/religious issues and themes, and readings.

g. Devotional Presentations

Students are expected to present a brief devotional. This is an opportunity for students to connect devotional presentation to a ministry and life experience. A variety of sources might be used for these opportunities-scripture, music, poetry, etc.

h. Book or Journal Article Review or Reports

Students may be assigned a specific book or journal article to read and review. Although these will change and be updated regularly, below is a list of current resources.

i. Assessments

CPEI CPE uses a variety of assessments for student learning and feedback. These include the items listed below, as well as mid-course and final evaluations. While evaluations can be used to mark the time in a course, evaluations primarily measure learning, accomplishments, and ongoing areas of needed growth that require the student to reflect on what the students have learned. In addition, an internship coordinator will be asked to submit an assessment.

- 1) LMS modules- students are expected to complete the modules corresponding to each course's learning outcomes. Upon successful completion, the student will receive a certificate which should be presented to their supervisor-educator.
- 2) Internship assessment- students are expected to identify an Internship Coordinator if in a strictly online course. The Internship Coordinator is to be provided with a copy of the assessment for feedback on how the student has used the internship site and met the required hours.
- 3) Post-course assessment- students are expected to complete a post-course assessment which enables the Education Committee to review and make recommendations for improving the course curriculum, etc.

j. Evaluations

Students are required to submit a mid-course and final evaluation.

- 1) Mid-Course evaluation- is a written document following an approved format in which the student articulates how one has met or is meeting the learning goals established for the course. It is a time of self-reflection and the opportunity to receive feedback from one's peer group and supervisor-educator.
- 2) Final evaluation- is a written document following an approved format in which the student articulates how one has met the learning goals. The final evaluation must be submitted prior to the end of the course if the student expects to receive credit. A copy of the final evaluation will remain as part of the student's record.

Process 214: Calculating Hours and Awarding IACET CEUs

Purpose: A process for identifying how course hours and IACET CEUs are calculated and awarded.

Responsible: Administrative Staff

Date Developed: April 2020

Date Reviewed: 10072020, 07212021; 10012021; 01202023; 06062023

Action Steps

1. CPE Supervisor-Educators communicate to the students the requirements for earning course hours and awarding IACT CEUs at the beginning of each course.
2. Clock hour: Clock hour is defined as instructional time. One instructional hour is defined as 60 minutes of instruction in a 60-minute period. A 5–10-minute break may occur between each 60-minute small group experience; however, the break time does not count toward the hours.
3. Contact time: Contact time is the length in which a learner and learning source interact. A contact hour is one clock hour of interaction between a learner and an Educator or between a learner and learning materials. NOTE: This definition applies to both face-to-face interactions and distance or online, self-paced learning events.
4. Distance education is the process of instruction and learning that occurs when a student and instructor are in different locations.
 - a. CPEI courses must meet a minimum of 87% of distance education.
 - b. IACET CEUs are awarded for 300 of 400 hours or 30 IACET CEUs for each CPE/SEC course.
 - 1) Allowed Activities: classroom, self-paced, distance-learning, or other projects which support a learning outcome.
 - 2) Not Allowed Activities: unsupervised or unsponsored activities such as breaks, non-working lunch, or anything promotional in nature.
 - 3) IACET CEUs: Contact time (Hrs.)/10 Hours -#CE or 1 CEU – 10 hours
 - 4) 1 – contact hour (60 Minutes) = 0.1 IACET CEU
5. At a minimum, CPE students are required to meet the requirements to fulfill 400 hours per course. This includes, but is not limited to:
 - a. Remaining engaged in learning activities as described below.
 - b. Submitting work to Populi.
 - c. Submitting a copy of internship log hours to Populi.

The following is an example of documented clock hours for an Intensive 12-Week Term.

Activity	Engagement Learning	Estimated clock hours
Coursework-Engagement Learning	Group Supervision: students engage the supervisor-educator and peers in group supervision and presentation of written	36

	work, i.e., verbatims (case studies), learning contracts, journaling, evaluations, etc.), didactic presentations, etc. (3 clock hours per week).	
	Individual supervision: students schedule time with the supervisor-educator to discuss issues related to one's personal and professional development.	12
	TOTAL: (12 weeks x 4 hours per week) = or 48 of 100 clock hours (48%)	48
Coursework Preparation/Engagement Learning Online	Online Learning Completing LMS Modules	8
	Writing Verbatims or Case Studies	8
	Writing Verbatim Reflections	6
	Writing Weekly Reflection	12
	Time spent reading texts or journal articles.	6
	Preparing Presentations (Genograms, Teaching Sessions, etc.)	6
	Writing Mid-Course Evaluation	2
	Writing Final-Course Evaluation	4
	TOTAL: 52 hours of 100 clock hours (52%)	52
Clinical Internship Engagement Learning	Self-Directed Internship training focuses on self-awareness and the development of personal and pastoral identity and skills (25 clock hours per week) or practicing the art of pastoral supervision.	25
	TOTAL: 25 hours x 12 Weeks=300 of 400 clock hours (75%)	300
Total clock hours = 400, of which 348 are engagement (88%)		400

1. The average adult reading rate is 250 words per minute with 70 percent comprehension. [Smith, Brenda D. "Breaking Through: College Reading" 7th Ed. Longman, 2004]
2. Reading for learning (100-200 wpm); reading for comprehension (200-400 wpm); and skimming (400-700 wpm). With an average of 400 words per page, at 200 words per minute a student should read around 30 pages per hour (200 words per minute x 60 = 12,000 words per hour divided by 400 = 30 pages per hour). Therefore, we are using 25-30 pages per hour.
3. Audiobooks are recommended to be 150-160 words per minute or 22 pages per hour.

4. Reading on Monitor: 180-200 wpm or 27 pages per hour.
5. Slide presentations are closer to 100 wpm or 15 pages per hour.

Student Log Link: <https://form.jotform.com/230694810898166>

Internship Coordinator Assessment: <https://form.jotform.com/221883126508154>

Process 215: Grading-Assessment of Students Achieving Learning Outcomes

Purpose: To identify a variety of tools/instruments used to assess the achievement of learning outcomes for students and to communicate the results.

Responsible: Education Committee

Date Developed: April 2020

Date Reviewed: 10022020; 1001/2021; 10012022; 06062023

Action Steps

CPEI/CPEI uses a variety of assessments, surveys and evaluative instruments.

1. CPEI Assessments/Surveys

- a. Assessments/Surveys: CPE/CPEI CPE uses a variety of assessments/surveys for student learning and feedback.
- b. LMS post-module assessment.
- c. The Internship Coordinator assessment. To provide feedback on the student's development and to affirm the completion of internship hours.
- d. End of Course Survey- students are expected to complete an end of course survey which will assist the Education Committee in reviewing and making recommendations for improving the course curriculum, etc.

2. Evaluations

- a. Mid-Course evaluation- is a written document following an approved format in which the student articulates how one has met or is meeting the learning goals established for the course. It is a time of self-reflection and the opportunity to receive feedback from one's peer group and supervisor-educator.
- b. Final evaluation- is a written document following an approved format in which the student articulates how one has met the learning goals. The final evaluation must be submitted prior to the end of the course if the student expects to receive credit. A copy of the final evaluation will remain as part of the student's record.
- c. Supervisors-Educators provide a copy of their final evaluation to students for review, approval or if needed, comments from students.
- d. Completed final evaluations shall be kept in the student's electronic file indefinitely in Populi.

3. **Requesting Copies:** Students may request a copy of the Supervisor-Educator evaluation. However, a fee may be required. Students must present their student membership # via the Transcript and Evaluation Request form.

4. Completion of Course Requirements

- a. Students must complete 100 clock hours of engagement (100% for online students) and (52% minimum for hybrid students). In addition, all students must complete 100% distance learning in an internship site of 300 clock hours.

- b. Grading is based on the ongoing submission of assignments in Populi and by the submission of the completed hours in an internship setting.
- c. Students are able to see their academic progress via Populi as to the status of their grade points.
- d. CPEI places significant weight on the final evaluation for students as this is culmination of what the student has learned or is learning. Therefore, at the conclusion of the course, all students in all programs will submit a final evaluation as will the supervisor-educator. Grades for the final evaluation are based on the scale below.
- e. CPEI also uses grading rubrics to assist students in gaining an better understanding of how they are developing.

Academic Grading Scale

Letter Grade	Points	Category	Evaluation
A+	100-96	Exemplary	Exceeded Learning Outcomes
A	95-91	Exemplary	Nearly Exceeded Learning Outcomes
B+	90-86	Competent	Met Learning Outcomes
B	85-81	Competent	Nearly Met Learning Outcomes
B-	80-76	Developing	Making Progress Toward Learning Outcomes
C+	75-71	Developing	Making Some Progress Toward Learning Outcomes
C	70	Minimally	Minimally Addressed Learning Outcomes

CPE 200-Verbatim-Case Study-1 edit

Published Yes

Description --

Criteria	Levels		Weight
Verbatim/Case Study Format- <small>↕</small> <small>✎</small> <small>🗑</small>	100% - 51% Exemplary The verbatim/case study clearly followed the required format.	50% - 0% Developing The student partially or did not follow the required format.	25%
Receiving Feedback CPE 200 <small>↕</small> <small>✎</small> <small>🗑</small>	100% - 51% Exemplary The student is accepting of feedback on pastoral care skills from peers and supervisor-educator.	50% - 0% Developing The student appears to struggle in accepting feedback on one's pastoral care from peers and supervisor-educator.	25%
Use of Spiritual Assessment - CPE 200 <small>↕</small> <small>✎</small> <small>🗑</small>	100% - 51% The student's case study exhibits use of a spiritual assessment model.	50% - 0% The student is learning how to use a spiritual assessment model.	25%
Concept of Self (copy) <small>↕</small> <small>✎</small> <small>🗑</small>	100% - 51% The student included some self-assessment of triggers and emotions during verbatim/case study.	50% - 0% The student is learning how to include self-assessment of triggers and emotions during verbatim/case study.	25%
Add criterion	<small>Edit criteria weights</small>		Total 100%

Supervisory Education Course (SEC 600)

Criteria	Levels	Weight
Essay: Psychodynamic Theories of Human Development and Supervision	<p>100% - 68% Exemplary The benefits and limitations of choosing a psychodynamic model of pastoral supervision were clearly articulated.</p> <p>67% - 35% Acceptable The benefits and limitations of choosing a psychodynamic model of pastoral supervision were articulated.</p> <p>34% - 0% Developing The benefits and limitations of choosing a psychodynamic model of pastoral supervision were partially articulated.</p>	100%
Psychodynamic Theory and Group Supervision	<p>100% - 68% Exemplary The essay clearly articulated issues that might surface in a CPE Group using the psychodynamic approach.</p> <p>67% - 35% Acceptable The essay articulated issues that might surface in a CPE Group using the psychodynamic approach.</p> <p>34% - 0% Developing The essay partially articulated issues that might surface in a CPE Group using the psychodynamic approach.</p>	0%
Writing Style	<p>100% - 68% Excellent The paper thoroughly reflects graduate-level academic voice and vocabulary. There are very few spelling and grammar errors.</p> <p>67% - 35% Acceptable The paper partially reflects graduate-level academic voice and vocabulary. There are very few spelling and grammar errors. The paper exceeded the page requirements by 1-2 pages.</p> <p>34% - 0% Developing</p>	0%

Criteria	Levels	Weight
	The paper failed to reflect graduate-level academic voice and vocabulary. There were several spelling and grammar errors. The paper exceeded the page requirements by 3 or more pages.	
<u>Add criterion</u>	<u>Edit criteria weights</u> Total	100%

Evaluations

Accountability: Failure to comply will result in a referral to the CPEI Administrative staff.

Process 216: Enrolling and Verifying Students

Purpose: To identify the means for enrolling and verifying students.

Responsible: Registrar and Supervisor-Educators'

Date Developed: April 2020

Date Reviewed: 09302020; 10012021; 09022022; 01202023; 06062023; 08312023

Action Steps

1. All students are required to enroll with CPEI via Populi. Students will be required to submit a copy of their driver's license or a government-issued photo identification.
2. After enrollment, students are issued an ID number.
3. The student ID # will be used on all documents related to the student's request for release of information, etc.
4. Supervisor-Educators and Internship Coordinators will confirm enrollment during the first course with CPEI by confirming it is the same student via their driver's license or government-issued photo it is the same person they interviewed.
5. Accountability: Failure to comply will result in a referral to the CPEI Administrative staff.

Process 217: Informing Students of Course Requirements for Receiving IACET CEUs

Purpose: To ensure students are informed of the course requirements and meeting the criteria for earning IACET CEUs.

Responsible: All certified supervisors-educators.

Date Developed: April 2020

Date Reviewed: 09302020; 10012021; 01202023

Action Steps

1. Students will be informed of the course requirements and IACET CEUs. This will be accomplished by the following:
 - a. An enrollment letter provided to student applicants states the course requirements.
 - b. Information will be listed in the student handbook and CPEI's Website regarding the course learning outcomes.
 - c. CPE Centers' brochures will communicate the course requirements.
 - d. Supervisors-educators will have the opportunity to share with students during the interview.
2. IACET CEUs are awarded upon successful completion of the CPEI Learning Outcomes for CPE and Supervisory CPE, which also includes the completion of the required 100 hours of structured learning and the completion of course requirements and LMS modules.
3. Accountability: Failure to comply will result in a referral to the CPEI Administrative staff.

Process 218: Informing Students of Compliance with Course Requirements

Purpose: A process to inform students of course requirements and the potential consequences of failing to do so.

Responsible: All certified supervisors-educators.

Date Developed: April 2020

Date Reviewed: 09302020; 10012021; 01202023; 06062023

Supervisor-Educators are responsible for supporting and sometimes addressing students in their academic work. Below are listed the requirements and actions to be taken when students fail to meet them.

1. **Academic and Behavioral Requirements:** All students must meet CPEI Requirements of 400 hours of engagement and preparatory learning. This includes academic and other areas of responsibility.
 - a. Financial: Meet all financial obligations, which include tuition and enrollment fees.
 - b. Course Requirements
 - 1) Have access to a computer, webcam, and the Internet.
 - 2) Be visible during group and individual supervision.
 - 3) Maintain a secure and confidential setting for the educational process.
 - 4) Participate regularly in group and individual supervision.
 - 5) Be respectful and tolerant of different opinions in the learning and internship environment.
 - 6) Demonstrate ethical and professional behavior in the course and internship activities.
 - 7) Demonstrate academic honesty in presenting one's work, which includes not plagiarizing another person's work and reporting only the number of hours involved in an internship.
 - 8) Maintain confidentiality with all material shared in and outside the group.
 - 9) Abide by CPEI's and the Internship site's policies and processes.
 - 10) Post all coursework, including evaluations, to Populi on time.
 - 11) Maintain at least a grade of 70 and demonstrate continuous improvement.
2. **Actions Required for Failure to Meet the Above Requirements**
 - a. Action 1: Discuss: Supervisor-educator will meet with the student to discuss areas of concern and a process for improvement. If this does not address the problem, move to Action 2.
 - b. Action 2: Probation: Place the student on probation for the remainder of the course. This includes providing the student with a written letter which becomes part of their written record in Populi. Address specific areas that need to be addressed. If the student does not meet the requirements as outlined, move to Action 3.
 - c. Action 3: Administratively Withdrawn: Students that fail to meet the course requirements for at least two weeks without a legitimate explanation that the supervisor-educator has approved may be administratively withdrawn. The

refund policy will be reflected in the number of completed assignments. For example, if a student has completed five written assignments, the student would be refunded 50% of the tuition paid, minus the enrollment fee and a registration fee per program of no more than 20 percent of the tuition, which cannot exceed \$200 maximum.

Form: [Student Non-Compliance Form](#)

3. **Appeal Process:** Students can appeal the decision in response to the actions taken by the Supervisor-Educator. The process is as follows:
 - a. Submit the reason for the appeal in writing to the supervisor-educator within 30 days of receiving a decision provided by the Supervisor-Educator.
 - b. The supervisor-educator will respond, in writing, within 30 days to the appeal.
 - c. If the student does not feel the response is acceptable, an additional appeal with all the previous correspondence may be filed with the Ethics Committee of CPEI for review. The ethics committee will respond within 30 days in writing to:
 - 3) Support the new appeal.
 - 4) Deny the appeal.
4. **Accountability:** The Ethics Committee's decision is final.

Process 219: Comprehensive and Systematic Evaluation of CPEI Courses

Purpose: To communicate the process for consistently and systematically evaluating CPE and Supervisory Courses.

Responsible: All certified supervisors-educators.

Date Developed: April 2020

Date Reviewed: 12162020; 10012021; 01202023

Action Steps:

1. The Education Committee is responsible for developing and managing the systemic evaluation of CPE and Supervisory Courses.
2. CPE and Supervisory Education students will complete evaluations at the end of the course to determine the application of learning and the competence of the supervisor-educator.
6. **August:** The Education Committee will review the course curriculum, course objectives and outcomes, post-course assessment summaries, and other information to determine gaps, changes needed, etc.
7. **October:** Recommend changes, additions, or modifications to the Executive Council (EC) for approval.
8. **November:** CPEI Board of Directors to receive report from the Ed. Committee.
9. **January:** Make changes in CPE handbooks, LMS modules, and distribute to all CPE Supervisors-Educators of approved changes and developed didactic or other educational resources.
10. Accountability: Failure to comply will result in a referral to CPEI's Administrative Staff.

Process 220: Analyzing and Communicating Assessment Results

Purpose: To outline the process for analyzing and communicating the assessment results for CPE and Supervisor/Education Courses.

Responsible: All certified supervisors-educators.

Date Developed: April 2020

Date Reviewed: 12162020; 10012021; 01202023

Action Steps:

1. The Education Committee is responsible for the development and management of the systemic evaluation of CPE and Supervisory Courses.
2. The Education Committee will review the course curriculum, course objectives and outcomes, post-course assessment summaries, and other information with members of the Education Committee and the Education Advisory Committee in October to determine gaps, needs, and revisions in the course content.
3. Recommend changes, additions, or modifications to the Executive Council (EC).
4. **January:** Make changes in CPE handbooks, LMS modules, etc., and distribute to all CPE Supervisors-Educators of approved changes and develop didactic or other educational resources.
5. **Accountability:** Failure to comply will result in a referral to CPEI's Administrative Staff.

Process 221: Planning and Executing Continuing Education Activities for CEUs

Purpose: To outline a process for planning and evaluating continuing education activities and IACET CEU Credit.

Responsible: CPEI members designing IACET CEU activities.

Date Developed: April 2020

Date Reviewed: 12162020; 10012021; 01202023

Action Steps:

1. The education committee is responsible for approving and evaluating continuing educational events.
2. Learning events are specialized training for a specified audience, typically with pastoral care or religious themes. The application to seek approval link:
<https://form.jotform.com/211794118592158>
3. These activities could be planned for a variety of audiences, including but not limited to:
 - a. Religious leaders (Pastors, Church Staff, Ecclesiastical Employees.)
 - b. Chaplains
 - c. Physicians
 - d. Nurses
 - e. Other healthcare workers
 - f. Counselors/Marriage and Family Therapists
 - g. Social Workers
4. Approval Process:
 - a. A minimum of eight (8) weeks is recommended to submit the request to provide an IACET CEU activity: <https://form.jotform.com/211794118592158>
 - b. The Education Committee will review and approve the event within two weeks of seeking the request.
 - c. The Education Committee will require the following:
 - 1) Record of those in attendance and those receiving IACET CEU Credit.
 - 2) Copy of the Learning Event Schedule (dates, location, speaker)
 - 3) Copy of the Learning Event Objectives/Outcomes
5. Presentation Requirements: Those approved to provide the training will ensure:
 - a. Promotion of activity describes fees, time, location, and the acknowledgment of any ethical concerns.
 - d. Room preparation.
 - e. Handout resources are prepared and ready for distribution.
 - f. Technology (computer, sound, etc., are operating properly)
 - g. Requirements for receiving IACET CEUs are clearly communicated.
 - h. Training Activity Assessment is prepared and ready to be administered.
 - i. Certificates are awarded to include (Sample located in <https://bit.ly/3bcWldq>):
 - 1) CPEI Logo and/or Institutional Logo
 - 2) Participant's Name
 - 3) Course Name

- 4) IACET CEU Credits Awarded
- 5) Date of Event
- 6) Signature of Presenter or Institutional Representative
- 7) Recognition of CPEI as an Accredited IACET Provide

6. Accountability: Failure to comply will result in a referral to CPEI's Education Committee or CPEI's Administrative Staff.

Process 222: Quality Review for Policies and Processes

Purpose: To outline a process for an annual review of CPEI Policies and Processes.

Responsible: Ethics Committee

Date Developed: April 2020

Date Reviewed: 10012021; 01202023

Action Steps:

1. The Ethics and Compliance Committee will assemble and maintain copies of all CPEI Policies and Processes in Populi Ethics and Compliance Folder.
2. All policies and Processes will be listed on an Excel spreadsheet listing the policy by Title, Document ID, and the date of the last review.
3. **March:** All CPEI Policies and Processes will be reviewed.
4. **May:** A report will be submitted to the CPEI Board of Directors.
5. Process for Review:
 - a. Sixty days (60) prior to the review date, the responsible parties for the policy will be sent a request via JotForm asking them to review their policy(s) to make any recommendations for changes, updates, or approval of the current policy.
 - b. Responses will automatically be emailed to the Ethics and Compliance Committee Chair.
 - c. The Ethics and Compliance Chair will forward responses to the Quality Review Subcommittee for review.
 - d. The Quality Review Subcommittee may bring in ex-officio members to assist with the process as needed.
 - e. The Executive Director or Representative will inform the Ethics and Compliance Committee Chair of any changes to standards from any accrediting organization that may impact the policy and process review process.
 - f. When changes to Standards are made, the Committee will ensure the policyholder is informed of the changes and asked to make changes in the policy or procedures.
 - g. **April:** The Ethics Committee will present the updated policies to the Executive Council (EC) for approval.
6. Approved updates will be submitted to the Executive Director and Administrative Assistant to update manuals, the internet, and any public location of the policy.
7. The CPEI Membership will be notified through email by the Administrative Assistant or Executive Director of updated policies.
8. When a new policy or process needs to be developed the Executive Director and/or EC and/or Assigned Committee Chair will write a policy or process. A copy will be sent to the Chair of the Ethics and Compliance Committee for review and be placed in the Policy CPEI's Record-Keeping folders.
9. Accountability: Failure to comply will result in a referral to CPEI's Administrative Staff.

Process 223: CPEI Leadership Succession Plan

Purpose: To outline a succession process for the positions of Executive Director, President, and President-Elect when a vacancy occurs.

Responsible: CPEI Board of Directors

Date Developed: April 2020

Date Reviewed: 11042021; 01202023; 06062023

Action Steps:

CPEI Executive Director Vacancy

1. Resignation, Retirement, or Removal of the Executive Director the following process will be followed.
 - a. Resignation/Retirement: Unless circumstances prevent it, the Executive Director will submit a resignation letter to the Board of Directors at least 3 months prior to departure.
 - b. Removal: The Executive Director may be removed based on one more of the following actions as approved by the Board of Directors.
 - 1) Ethical behavior inconsistent with the position, including, but not limited to, the misappropriation of funds, misrepresentation of CPEI to the community, etc.
 - 2) Ineffective leadership. Failure to effectively lead the organization forward in reaching its strategic goals.
 - 3) A severance package would be determined by the Finance Committee and recommended to the Board of Directors for approval. The severance package should consider the number of years the Executive Director was employed.
2. Actions Upon the Executive Director's departure.
 - a. The current CPEI Chair of the Board of Directors will assume the role of Interim Executive Director, and the Vice-Chair-Elect will immediately assume the Interim Board of Directors position.
 - b. Under the leadership of the Interim Executive Director the Board of Directors will review the Executive Directors' job description and responsibilities to determine if any changes need to be made and appoint an Executive Director Search Ad Hoc Committee. The Executive Search Ad Hoc Committee will consist of 7 members with the Interim Executive Director serving as Chair. Ex-Officio members can be selected by the Board of Directors or recommended by the Search Committee as needed.
 - c. The Search Committee will meet on a regular basis and will submit meeting minutes to the Board of Directors, to keep them informed. The Search Committee will also keep the CPEI Membership aware of the work they are doing. The names of applicants will be kept confidential to the Search Committee until the Board of Directors need know for decision making reasons.
 - d. Once the Search Committee has a candidate(s) to recommend for the Executive Director position, they will have the Interim Chair of the Board of Directors meeting the Board of Directors where the name(s) will be presented and discussed.

- e. Upon consensus of the Board of Directors, the final candidate will be approved or rejected. The Board of Directors will make the final decision.
 - f. Once the decision has been made, the candidate will be notified and given three days to either accept or reject the offer. Upon acceptance, the Interim Executive Director will notify the CPEI Membership of the newly selected Executive Director. If the candidate does not accept, then the process of the Search Committee resumes a search.
 - g. Once the Executive Director begins, the Interim Executive Director will resume as CPEI Chair of the Board, and the Interim CPEI Chair of the Board will resume as Vice Chair of the Board.
 - h. If either the Chair of the BOD or Vice Chair of the BOD is chosen as the Executive Director, then the Succession Plan for the Chair of the BOD or Vice Chair of the BOD will be followed.
3. In the event of the vacancy of the Chair of the BOD the following process will be followed.
 - a. The Executive Director will notify the Vice Chair of the BOD of the vacancy and the Vice Chair will assume the Chair of the BOD position immediately upon the departure of the Board Chair. The Board of Directors will be notified by the Executive Director immediately after notifying the Vice Chair.
 - b. The newly appointed Board Vice-Chair will serve as the Interim Chair of the Nominating Committee. The Nominating Committee will recommend a replacement for the position of Vice-Chair to the Executive Council for approval or rejection.
 - c. Upon approval, the Executive Director or Board Chair will notify the CPEI Membership of the newly selected Vice Chair.
 - d. The Board Chair and Vice Chair will serve the remainder of the terms being vacated.
 4. In the event of the vacancy of the Vice-Chair the following process will be followed.
 - a. The Executive Director will notify the Board Chair of the vacancy.
 - b. The Board Chair will serve as the Interim Chair of the Nominating Committee. The Nominating Committee will recommend a replacement for the position of Vice Chair to the Executive Council for approval or rejection.
 - c. Upon approval, the Executive Director or Board Chair will notify the CPEI Membership of the newly selected Vice Chair.
 - d. The Board Chair and Vice-Chair will serve the remainder of the terms being vacated.
 5. **March:** The Succession Plan will be reviewed by the Ethics Committee as part of the annual Policies and Processes Review.
 6. The Executive Director is provided with a life insurance policy, paid for by the institution which designates CPEI as the beneficiary. The proceeds are to be used as security for any ongoing obligations, or expenses for an executive search in the event of the death of the Executive Director.
 7. The Search Committee will review and determine the qualifications of the successor of the Executive Director when the time arrives. The qualifications may change over a period of time. Upon determining the qualifications, the Search Committee will conduct

a search for the right person. The Search Committee will verify information on the candidate's resume to determine accuracy and if needed, a background check will be requested.

8. Since the Board Chair and Vice Chair are non-paid, there is not a need to determine compensation, unless the Board Chair assumes the Interim Executive Director role. In the case of the Executive Director, the Executive Council, in conjunction with the Finance Committee will determine a compensation package based on needs and resources available.

Process 224: Facilities, Equipment, Supplies, and Safety Plan

Purpose: To ensure CPEI maintains adequate facilities, equipment, supplies, and safety plan to support students and faculty, meet institutional goals, and prepare for projected growth.

Responsible: Administrative Staff

Date Developed: April 2020

Date Reviewed: 03032022; 01202023; 06062023

Action Steps:

1. **Responsibility:** Parties responsible for reviewing, revising, and implementing this plan are as follows:
 - a. The administration will review and implement the requirements of CPEI and submit recommendations to the EC as part of CPEI's Strategic Initiatives.
 - b. The Ethics and Compliance Committee in coordination with the Administration will review and update the plan annually in accordance with CPEI's Institutional Effectiveness Plan schedule and submit changes for approval to the EC.
2. **Budget:** The administration will work closely with the Finance Committee to ensure adequate resources are projected for upcoming requirements or needs.
3. The administration will maintain a list of the following and submit a compliance report annually to the Finance Committee for budget consideration and the EC. Compliance Report (See attached below)
4. **Budgeting:** Review CPEI's annual budget funds and projected Strategic Plans Budgeting Requirements for the following:
 - a. Office space
 - b. Office equipment
 - c. Office supplies (promotional items)
5. **Facility inspections:** persons completing the annual compliance report will review the following items as needed: fire alarms, sprinkler systems, etc.
6. **Property Insurance:** Determine whether the property insurance is up-to-date and sufficiently covers the property.
7. **Property Taxes:** Determine whether the property taxes are current or additional funds are required.
8. **Safety:** Determine whether personnel are aware of the actions and requirements in the event of severe weather, fire, etc.
9. **Accountability:** Failure to comply will result in a referral to the Executive Council (EC).

Facilities, Equipment and Supplies Compliance Report		
Reviewed By:	Date Reviewed:	Comments
CPEI Items	Adequate (Yes/No/NA)	Annual Budget or Strategic Initiative Recommendations
Facilities		
-Fire alarms active		
-Sprinkler systems		
-Exit lights working		
-Other		
Property Insurance		
-Current and Sufficient		
Property Taxes		
-Taxes are current. Are additional funds required for the future?		
Emergency Plan (Personnel Safety is the Priority).		
-Staff understand they will operate from home in the event of severe weather, fire, bomb threat, etc.		
-Personnel are informed to contact 911 in the event of a fire, bomb threat, or Medical Emergency.		
-Personnel are informed to backup records and secure equipment		
Equipment		
-Computer		
-Printer		
-Online Resources, i.e., Microsoft CPEI's Record-Keeping folders, JotForms, Quickbooks, etc.		
Supplies		
-Promotional Resources		
-Office Supplies		
-Other		

Appendix B: Glossary

Accreditation is a public service that aims to accomplish the following: provides public assurance of program quality, improves the quality of training/educational programs, encourages ongoing evaluation and development, and maintains that programs continually evaluate and improve in relation to their institution/agency's mission, meets standards and goals and educational/training objectives, and monitors the outcome of improvements.

The Action/Reflection/Action Model of Education is process-oriented learning. This model begins with clinical experience and moves to student reflection, followed by critical feedback and, hopefully, new insights for the next clinical experience.

CPEI Advisory Council is comprised of volunteer stateholders who have no direct affiliation with CPEI and are asked to provide feedback on current trends and needs among the population being served.

Assessments/Surveys are used to evaluate the educational programs as well as the perception of students' growth and development. Dependent upon the location of the student's clinical site, an assessment may also be provided to the clinical/site coordinator.

Book Reviews are used to expose a variety of pastoral care texts and resources in which to further their knowledge and skills. Students will be supplied with the opportunity to share insights gained and other thoughts within the peer group.

Behavioral Social Sciences involve a variety of contributing factors that influence human behavior. For purposes of CPE, it is the growing awareness of factors such as mental health concerns, grief, loss, fear and anxiety, abuse, etc., and the integration of such knowledge and awareness into one's clinical practice.

Case Conference is a conscious retelling of pastoral encounters that are presented during individual and/or group supervision. A case study format is typically used when one has several pastoral encounters with the same individual(s) and would like to evaluate the ministry which took place.

Clinical Pastoral Education (CPE) is an element of theological education that uses an action/reflection/action inductive method of learning. It is about change, transition, and transformation and involves peer and individual supervision. Supervision is an engaging encounter between a Supervisor-Educator and supervisees in which a variety of pastoral encounters and ministry-reporting events are reviewed. Students covenant together so that growth and development occur in self-awareness, ministry competence, and theological understanding.

Clock Hour is equal to 50 of 60 minutes.

CPE Course is used to describe the time students and supervisors-educators spend learning and gaining insight about self. It is the equivalent of the CPE Unit.

CPE Supervisory Candidate has demonstrated giftedness and calling to help train/educate students in the art and skill of Clinical Pastoral Education (CPE), having been admitted to the first stage of Supervisory Education. Individuals in this stage of Supervisory education may observe the group process and co-supervise Courses of CPE.

CPE Supervisor-Educator is an individual who has met all the requirements to supervise ongoing groups of CPE students.

CPE Training Supervisor-Educator is an individual that has supervised courses of CPE for a minimum of two years and has been certified to supervise individuals in the CPEI Supervisor-Educatory Track.

CPEI Connections take on different formats but consist of students and certified members who meet for the purposes of sharing knowledge, consultation and creating best practices.

Devotionals are presented in various contexts and have spiritual insights and encouragement.

Distance Education is a process of interaction and learning that occurs when a student and instructor are not in the same location.

Engagement Learning may include but is not limited to, synchronous learning that involves individual and group learning and the internship.

Preparation Learning refers to asynchronous learning, which involves reading and developing one's weekly submissions, completing learning management system modules, and final evaluations.

Evaluations measure the achievement of learning outcomes, accomplishments, and ongoing areas of needed growth.

Group Process provides the opportunity for students to practice their skills, promote personal growth, and provides the Supervisor-Educator examples of how students are implementing knowledge learned in the classroom setting, paralleling how students are providing care in the clinical/work setting.

Internship Site is a clinical environment (healthcare, hospice, church, law enforcement, etc.) in which students provide pastoral care to patients, clients, staff, etc.

Learning Contract or Covenant is an expression of one's learning goals for the course unit. In writing one's learning goals, it may be helpful to think of "What do I hope to learn? What are my personal and professional learning needs and goals? How will my learning be measured and evaluated?"

Learning Management System (LMS) is a software program that enables students and supervisors to complete online courses for credit and the issuance of a Certificate. The platform allows for the creation of modules/lessons, quizzes, discussion boards, assignments, video presentations, etc.

The Pastoral Advisory Committee (PAC) is a small group of 3-5 individuals whose duties may vary but typically include, but are not limited to, participating in the student interview and selection process, consulting with members of the CPEI Affiliate Organization, presenting didactics, and participating in student exit interviews. The composition of the PAC is dependent upon one's affiliate setting. It could include individuals from the following areas: members of the hospital or hospice staff (Administration, nursing) (if healthcare site), behavioral science members (counselor, social worker, psychologist, psychiatrist), educators, community clergy, or a community leader.

Social Media refers to technologically mediated resources that allow people to create, share, or exchange information, e.g., Facebook.

Supervisory Clinical Pastoral Education is an intentional process of educating Supervisory Candidates in developing the competencies to be certified as a CPE Supervisor-Educator.

Synchronous refers to services that involve the interaction between the Supervisor-Educator, the Supervisor-Educator, and one's peer group.

Verbatim is a format that is used to present pastoral encounters in a structured way during individual and/or group supervision. The written verbatim captures the essential ideas within a conversation; however, for our teaching purposes.

Weekly Reflection is a paper that focuses briefly on the previous week's experiences and is used to evaluate its significance for one's learning process. Students can share feelings and concerns that impact them as a person and as pastoral caregivers.

Updated:

01/02/24

02/20/24

03/13/24