

CLINICAL PASTORAL EDUCATION INTERNATIONAL STANDARDS AND POLICIES MANUAL

Office: 2105 Park Avenue Suite 1, Orange Park, FL 32073

www.cpei.edu

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Table of Contents

<i>CPEI Educational Standards</i>	4
<i>IACET CEU Standards: International Accreditors for Continuing Education and Training</i>	7
<i>#100 Series: Policies Guiding Academic Success</i>	8
Policy 100: Admissions, Enrollment, and Returning/Continuing Enrollment Process	9
Policy 101: Enrolling and Verifying Students	14
Policy 102: Transfer of Credit, Transcripts, and Evaluation	15
Policy 103 Student Tuition, Fees, and Refunds	16
Policy 104: Tuition Discount	21
Policy 105: CPEI's Commitment to Students' Quality Pastoral Education	22
Policy 106: Satisfactory Academic Progress and Attendance	24
Policy 107: Student Integrity, Academic Honesty, and Academic Appeals	28
Policy 108: Student Extension, Incompletes, Leave of Absence, or Withdrawals	30
Policy 109: Distance Education and Internship Requirements	32
Policy 110: Calculating Hours and Awarding IACET CEUs	34
Policy 111: Technology Requirements and Support	35
<i>#200 Series: Policies Guiding Ethical Issues</i>	36
Policy 200: Complaints, Grievances, and General Appeals	37
Policy 201: Ethical Recruitment of Students	39
Policy 202: Student Confidential Records	42
Policy 203: Retention of Student Records Policy	45
Policy 204: Students and CPEI Faculty Rights and Responsibilities	53
Policy 205: Confidentiality and Password Protection	55
Policy 206: Anti-Discrimination and Harassment	56
Policy 207: Disclosure of Conflict of Interests and Dual-Multiple Relationships	57
Policy 208: Artificial Intelligence Guidance	58
Policy 209: Intellectual Property	61
Policy 210: Copyright Laws	63
<i>#300 Series: Policies Guiding Successful Educational Programs</i>	64
Policy 300: Content and Student Learning Outcomes (SLOs)	65
Policy 301: Course Content Review	67
Policy 302: Educational Curriculum Requirements and Qualifications	68
Policy 303: Formal Needs Analysis	71
<i>#400 Series: Policies Guiding Communication and Marketing</i>	73

Policy 400: External Communications Policy _____	74
Policy 401: CPEI Brand Use Policy _____	76
#500 Series: Policies Guiding Administrative Tasks _____	78
Policy 500: Affiliate Organizations _____	79
Policy 502: Affiliate/Individual Access to CPEI’s Learning Management System (LMS) _____	84
Policy 504: Annual Performance Review for CPEI Staff and Faculty _____	90
Policy 505: Administrative Support for CPEI Faculty _____	91
Policy 506: CPEI Leadership Succession Plan _____	92
Policy 507: Facilities, Equipment, Supplies, and Safety Plan _____	94
#600 Series: Professional Development Guiding Policies _____	96
Policy 600: Informing Continuing Education Participants of Course and IACET Requirements (former Process 221). _____	97
Policy 601: Planning and Executing Continuing Education Activities for Professional Development (former Process 221) _____	98
#700 Series: Credentialing/Certification Guidelines _____	101
Policy 700: Credentialing Appeals _____	101
Appendix _____	102

CPEI Educational Standards

Distance Education Accrediting Commission (DEAC)

Standard I: Mission

The mission defines the institution's purpose, guiding its actions and decisions while providing stakeholders with a clear sense of the institution's direction and identity within the distance education community.

Standard II: Governance

The governance structure of the institution provides sufficient academic and administrative leadership, oversight, capability, and stability to ensure the efficient and effective use of institutional resources consistent with the institution's mission.

Standard III: Institutional Planning and Effectiveness

The institution monitors the achievement of its mission, conducts strategic planning, and evaluates its institutional effectiveness.

Standard IV: Academic Achievement

Academic achievement is evaluated through assessment of student learning outcomes; student outcomes measures; and the sentiments of students, alumni, and employers.

Standard V: Academic Program Requirements

Program offerings are aligned with the institution's mission. Program requirements are clearly stated and consistent with accepted expectations for level and content at peer institutions.

Standard VI: Curriculum Development

The institution develops clear, up-to-date, and well-organized curricula for each program. Curricula are sufficiently comprehensive for students to achieve the stated program outcomes. Curricular organization and content are supported by reliable research and practice and reflect sound principles of learning, grounded in distance education instructional design principles.

Curricula development processes are codified in the institution's Curriculum Development Manual. Curricula review is included in the institution's program review processes.

Standard VII: Learning Materials, Resources, and Research Support

Learning materials and resources are aligned to the delivery modality, content area, and degree level and complement the teaching and curricula to support students' ability to achieve the stated program outcomes. The institution provides faculty and students with access to all relevant learning resources, materials, or related services appropriate for the achievement of course learning outcomes.

Standard VIII: Academic Delivery

As a provider of distance education, the institution uses mission-aligned and readily accessible technology to optimize interaction between and among faculty and students and effectively support instructional and educational services. Students, faculty, and practitioners involved in instructional activities receive training and support in the technology. Existing academic technologies are periodically reviewed for sufficiency and potential areas of improvement. The

institution also stays current with respect to new and emerging technologies and/or technological trends. Prospective students are informed of the institution's minimum technology requirements before admission.

Standard IX: Academic Leadership and Staffing

The institution models effective leadership and a shared purpose by ensuring that qualified individuals are serving in all academic roles. The institution is responsible for implementing and maintaining sufficient administrative staff and infrastructure to support the effective performance of its academic leadership and faculty. This includes ensuring access by academic leadership and faculty to academic and professional resources sufficient to allow them to stay current in their field.

Standard X: Academic Policies

The institution establishes, publishes, and enforces academic policies and procedures to ensure faculty and student integrity and academic honesty, as well as compliance with applicable laws in research activities. The institution also publishes clear criteria for admissions, transfer credit, prior learning assessment, and satisfactory academic progress. These criteria are readily accessible by current and prospective students, as well as by the general public.

Standard XI: Recruitment and Enrollment

The institution adheres to applicable state, federal, and international law, as well as DEAC's Code of Ethics, in its recruitment efforts. Enrollment agreements comply with DEAC's Enrollment Agreements Disclosures Checklist. Scholarships and discounts conform to DEAC definitions and are applied consistently.

Standard XII: Student Support Services

The institution's policies, procedures, and internal systems optimize interaction between the institution and students and actively promote student-faculty interactions, program completion, and educational success. The institution uses technology effectively to support such policies, procedures, and systems, including ensuring that student-facing applications are user friendly and accessible through the institution's website. The institution also provides staffing to adequately support the foregoing policies, procedures, and systems and respond to student inquiries, educational needs, and individual differences to facilitate program completion and educational success.

Standard XIII: Fair Practices

The institution's policies promote transparency, fairness, and respect for privacy and confidentiality. The institution's cancellation and refund policies must be fair, equitable, clear, and unambiguous.

Standard IX: Finance

The institution's financial policies, processes, and procedures are sufficient to ensure sound financial practices, fiscal management, and financial sustainability and stability. The institution's budgeting process is aligned with the strategic plan. Budgeting processes and financial reporting conform to best practice. The institution's financial position is sufficient to sustain operations and meet its obligations. Financial operations are overseen by qualified and

experienced personnel. Collections processes are monitored and respect the rights and interests of students.

Standard XV: Facilities and Records Maintenance

The institution has and maintains facilities, equipment, technology, and supplies sufficient to support its operations in compliance with DEAC accreditation standards and consistent with the institution's mission statement and published descriptions of academic programs, program outcomes, and student services. Institutions provide adequate physical and electronic security for student, financial, and administrative records. The physical location and/or virtual workspace infrastructure are adequate to sustain operations.

IACET CEU Standards: International Accreditors for Continuing Education and Training

Standard (Category I): Organization, Responsibility and Control

The provider must show proof of legal status i.e., Incorporated, Sole Proprietor, Partnership, Chartered by a State, Government or Other. Provide a mission statement, an organizational chart, a process of evaluating the effectiveness of the organization, qualitative and quantitative, a process to ensure continuous improvement, a process that prohibits discrimination, a policy that requires disclosure of the faculty's proprietary interests in products, etc., and a policy regarding the intellectual and legal property rights for materials used in the training.

Standard (Category II): Learning Environment and Support Systems

The provider must have a process for ensuring current educational materials, a clear process to ensure the achievement of learning outcomes and the dissemination of information as well as the process to ensure that support services and administrative and instructional design staff are engaged.

Standard (Category III): Planning and Instructional Personnel

The provider must ensure that individuals involved in the design, development, delivery and evaluation of learning events are qualified to perform their assigned tasks, and regular performance evaluations be performed.

Standard (Category IV): Needs Analysis

The provider must have a process for conducting a formal needs analysis for the learning event that guides the development of planned learning outcomes and learning event design.

Standard (Category V): Learning Outcomes

The provider must have learning outcomes that are specific and measurable, achievable, realistic and time-based.

Standard (Category VI): Content and Instructional Requirements

The provider must ensure that content supports the learning outcomes and the content is quality, current and applicable. Additionally, a process for calculating IACET CEUs must be in place.

Standard (Category VII): Assessment of Learning Outcomes

The provider must have a process to measure the achievement of learning outcomes.

Standard (Category VIII): Awarding the IACET CEU and Maintaining Learner Records

The provider must have a process for verifying the learner who registers, and a process for identifying the requirements to achieve an IACET CEU. Also, the organization must have a process for providing a transcript of the learning activity and an operational recording-keeping system.

Standard (Category IX): Evaluation of Learning Events

The provider must have a process that requires the comprehensive, systematic evaluation of the learning events and for sharing them with instructors, instructional design and development staff.

#100 Series: Policies Guiding Academic Success

**Active CPEI Faculty (CPEI SE) and the CPEI Training CPEI Faculty (CPEI TSE) will be identified in the Policies and Processes as “CPEI Faculty.”*

Policy 100: 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 CPEI Faculty and Students

Date Developed: April 2020

Date Reviewed: 09042021; 01012021; 01202023; 06262023; 08202023; 10082023; 10082024; 06092025; 11172025

100.1 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 CPEI Faculty. Additional requirements are included in the Credentialing Manual.

100.2 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 on 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](#).

100.3 Target Audience

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

100.4 General Admission Requirements

Completion of the CPEI Application (100%) is required before further actions can occur.

- A. Photo identification is required. Acceptable sources include a school photo, a driver's license, or a government-issued photo.
- B. 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.
- C. Academic transcripts are required. The 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 programs but may not have

access to a diploma may submit the self-certification form: [CPEI Self-Certification of Verification Form.pdf](#).

- D. Applicants who 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/>.

100.5 Foreign Transcript Evaluation

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

100.6 National Evaluation Services

- A. 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.
- B. 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.
- C. World Evaluation Services (WES) provides credential evaluation services.

100.7 Fees for Evaluation Services

Applicants are responsible for the cost of the selected service. The cost and the timeframe for performing the service will vary according to the complexity of the case and the amount of documentation provided. The entire credentialing process can take anywhere from 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.

100.8 Student Recruitment

- A. Sources: Students applying to CPEI come from a variety of sources, including, but not limited to, referrals from students, CPEI Faculty, CPEI Affiliates, seminaries and
- B. universities, employers, and online searches.
- C. Training: Annual training is provided to the CPEI Faculty regarding the guidelines and processes for recruitment, interviewing, and approval of students' applications.
- D. Student Recruitment Responsibilities: 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).
- E. To fulfill these responsibilities, I pledge adherence to this Code of Ethics. I will observe fully the accreditation standards, rules, policies, procedures, and guidelines established by Clinical Pastoral Education International and any other authorized agency.
- F. 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. As well as state the approvals, accreditation, business and employer recognition, and course acceptance requirements accurately and clearly to prospective students.
 5. 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.
 6. Provide prospective applicants with only complete and accurate information on the Total financial obligation they will be incurring to accept their enrollment application.
 7. Provide students with complete and accurate information about financing options and answer any questions.
 8. Never use tuition assistance available from a government agency or other sources as the primary inducement for enrollment.
 9. Refrain from making any statement or inference that might falsely impugn the integrity value of any internal and external CPE organization, entity, method of training, or profession.
 10. 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.
 11. 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.

100.9 Program Specific Requirements

A. CPE Applicants

1. 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.
2. Acknowledge the requirements to fulfill financial requirements, participate in weekly meetings with peers and CPEI Faculty, complete assignments outside class, and meet the required internship hours.
3. The Acceptance Process is in part determined by the applicant's ability to demonstrate:
 - a. Spiritual and emotional maturity.
 - b. One's ability to respond to individuals in crisis or other ministry needs.
 - c. Self-motivation and engaging in an action/reflection mode of learning.
 - d. The ability to engage one's CPEI Faculty and peer group for learning.

- e. The willingness to minister to persons of all faith groups and cultural backgrounds.

B. Supervisory Certificate Education Applicants

1. Possess a minimum of a graduate degree (36 hours) for CPE CPEI Faculty in theology or a related discipline. Individuals who do not meet the minimum requirements may submit for a review of educational equivalencies.
2. Completion of a minimum of 4 courses of CPE (1600 hours).
3. Board Certified Chaplain (BCC) credentialing is required before being admitted to the CPEI Certificate of Supervisory Education. The exception to this requirement is as follows:
 - a. The student has demonstrated the aptitude to advance into supervisory education.
 - b. The student has developed and accumulated all the elements necessary for the credential prior to enrollment.
 - c. The student has set a tentative date range for credentialing interview(s) that is realistic.
 - d. A short statement from the students' supervisor (most recent) indicating that the above 3 points have been addressed.
 - e. CPEI's Chief Academic Officer's Signature is required to approve the exception.
4. The Acceptance Process is in part determined by the applicant's ability to:
 - a. Demonstrate spiritual and emotional maturity.
 - b. Articulate one's educational goals.
 - c. Demonstrate the ability to be self-directed and highly motivated.
 - d. Articulate the ability to do research and write in an academic style.
 - e. Articulate the ability to supervise and educate students from all faith groups and cultural backgrounds.
5. The interview process for Supervisory Candidates: Selecting the best-qualified individuals to enter the supervisory education process is essential. Therefore, the CPEI-Training Supervisor Educator must engage one or more individuals in the interview process. In addition to the following options, current CPEI Supervisory Candidates should be asked to participate in the interview.
 - a. CPEI-TSE and at least one additional CPEI-TSE
 - b. CPEI-TSE and at least one or more members of one's Pastoral Advisory Committee.

100.10 Admissions Process

- A. CPEI Applications: Student applications include questions such as the source of 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.
- B. Interview: After the applicant completes and submits the CPEI application (100%

- complete), an interview will be scheduled with the applicant
- C. Accept/Decline: Following the interview, the faculty member will submit the acceptance or decline form. Once the accept/decline form has been received, the Registrar will email the applicant with the acceptance or non-acceptance within 10 days, and if accepted, an enrollment form will be sent.
 - D. Appeal Process: Applicants who are declined acceptance may appeal the decision by using the following form: [Complaints and General Appeals Form](#).

100.11 Reasons For Non-Selection of Applicants

- A. CPE: The applicant's inability to fully grasp the concept of Clinical Pastoral Education (CPE) and the adult learning process.
- B. CPE: The applicant's inability to locate a suitable internship site in time for the course to begin.
- A. CPE/SEC: There were concerns regarding the applicant's background check.
- B. CPE/SEC: The term for which they were applying was full; however, they have been invited to participate in a future term.
- C. SEC: The applicant failed to hold the appropriate academic qualifications for the program for which they were applying.
- D. SEC: The applicant failed to demonstrate a clear understanding of the supervisory educational process.
- E. SEC: The applicant failed to demonstrate the ability to communicate effectively in written and verbal forms.
- F. SEC: The applicant had not been credentialed as a Board-Certified Chaplain prior to applying.

100.12 Enrollment Policy

- A. CPEI's Chief Academic Officer establishes the start/end dates for terms.
- B. Students cannot be added to a course after the published day of that term.
- C. All registrations and enrollments must be processed by CPEI's Registrar, and the refund policy is to be followed and processed accordingly.
- D. The enrollment period ends the day the term begins. Exceptions must be approved by the Chief Academic Officer.
- E. Student billing/tuition (including billing to third parties on behalf of students) is payable to CPEI.

100.13 Returning/Continuing Enrollment

- A. Process for Returning/Continuing Enrollment of Students. Students who desire to continue with the next CPE/SEC Course will notify their CPEI Faculty.
- B. CPEI Faculty will submit the "Returning Student Enrollment Form" [Returning Student Enrollment Form](#)
- C. Process for Returning Students After an Absence of 12 Months or more, must submit a new CPEI Application.

Policy 101: Enrolling and Verifying Students

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

Responsible: Registrar and CPEI Faculty'

Date Developed: April 2020

Date Reviewed: 09302020; 10012021; 09022022; 01202023; 06062023; 08312023; 10082024; 11172025

101.1 Distance Education-CPE/SEC Students Process

- A. 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.
- B. After enrollment, students are issued an ID number
- C. The student ID # will be used on all documents related to the student's request for release of information, etc.
- D. CPEI Faculty 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, and the same person they interviewed.
- E. Accountability: Failure to comply will result in a referral to the CPEI Administrative staff.

Policy 102: Transfer of Credit, Transcripts, and Evaluation

Policy: Outlines the transfer of credit, transcripts, and the 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 CPEI Faculty

Date Developed: April 2020

Date Reviewed: 09042021;10012021; 01202023; 06262023; 08302023;10072023; 10082024; 11172025

102.1 Guidelines for Transfer of CPE or Supervisory Credit

- A. 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 recognized by the US Department of Education or an active Commission on Ministry in Specialized Settings (COMISS) member.
- B. 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.\
- C. Transfer of Credit: 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.](#)
- D. Evaluation and Approval Process for Transfer of Credit.
 1. The Chief Academic Officer (CAO) is authorized to review, approve, or disapprove the request for transfer of credit. In certain situations, the Chief Executive Officer (CEO) can review and approve the decisions.
 2. 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](#)
 3. The applicant will be notified of the decision.
 4. If approved, the Registrar will enter a "P" for pass in the student's Populi Profile, and the student will be enrolled in the subsequent CPEI Course.
 5. A record of the student's transfer request and approval is added to the student's record.
 6. Guidelines for Transfer of CPE or Supervisory Credit.
 - a. Become familiar with CPEI's Policy.
 - 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 Department of Education or an active member of the Commission on Ministry in Specialized Settings (COMISS).
- E. 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.

Policy 103 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, Faculty, and Students.

Date Developed: April 2020

Date Reviewed: 09042021;10012021; 08072022; 01202023; 06062023; 08012023;
022024;03262024; 06/17/2024; 10082024; 06092025; 11172025

103.1 CPEI is responsible for invoicing tuition and fees.

- A. Affiliate Organizations (AOs) or faculty members are not permitted to charge students more than the tuition established by CPEI per course.
- B. Tuition Processing:
 1. All tuition must be invoiced through CPEI regardless of the amount of the tuition discount.
 2. Healthcare, Military, and similar Institutional affiliates shall submit the **Affiliate Discount Request Form** annually, and CPEI will invoice them directly for payment to maintain an auditable record.
 3. Neither CPEI, Affiliate Organizations, nor faculty members are allowed to establish a payment plan for students' tuition and fees. Eligible students may seek financial assistance through PayPal or other providers.
 4. Affiliate Organizations may offer student discounts, provided they adhere to the guidelines established in Policy 102(B).

103.2 Tuition and Fees

- A. The total amount due for each course is \$1375.00 or \$5,500.00 for the Certificate in CPE (1600 Hours) or the Certificate in Supervisory Education (1600 Hours).
- B. All student tuition and fees will be submitted through CPEI's payment site within our learning management system, Populi.
- C. Tuition is due a minimum of seven days prior to the beginning of the term. Exceptions will be reviewed by the Registrar (registrar@cpei.edu) and submitted to the Chief Academic Officer (CAO) for approval.
- D. 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 Chief Executive Officer for approval.
- E. 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 or pay for them.
- F. 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)**

103.3 Cancellation and Tuition Refunds

- A. Students must submit in writing or email to request to withdraw to the CPEI Supervisor- Educator.
- B. A student withdrawing within five (5) days of signing the enrollment form is eligible for a full refund of the monies paid.
- C. 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).**
- D. Students canceling or withdrawing after the course begins are subject to refunds based on the guidance below.
- E. 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 or pay for them.
- F. Upon learning of the students' desire to withdraw, the CPEI Faculty will immediately submit the following form: [Cancellation for Withdrawal Form](#).
- G. 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 the 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	
12-16 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- \$1375 (Effective 2/1/25). The Administrative (Registration) fee is deducted for a program or first Course withdrawal-\$200 (*See Exception for Nevada Students), tuition less administrative (registration) fee- \$1175. Refund to the student: 40% of \$1175 = \$470.00. 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- \$1375. Refund to the student: 40% of \$1375 = \$550.00.*

**** Per California BPPE Regulation 5 CCR §76215.**

The State of California established the Student Tuition Recovery Fund (STRF) to relieve or mitigate economic loss suffered by a student in an educational program at a qualifying institution, who is or was a California resident while enrolled, or was enrolled in a residency program, if the student enrolled in the institution, prepaid tuition, and suffered an economic loss. Unless relieved of the obligation to do so, you must pay the state-imposed assessment for the STRF, or it must be paid on your behalf, if you are a student in an educational program, who is a California resident, or are enrolled in a residency program, and prepay all or part of your tuition. You are not eligible for protection from the STRF and you are not required to pay the STRF assessment, if you are not a California resident, or are not enrolled in a residency program.” (b) In addition to the statement required under subdivision (a) of this section, a qualifying institution shall include the following statement in its school catalog: “It is important that you keep copies of your enrollment agreement, financial aid documents, receipts, or any other information that documents the amount paid to the school. Questions regarding the STRF may be directed to the Bureau for Private Postsecondary Education, 1747 North Market Blvd., Suite 225, Sacramento, California, 95834, (916) 574-8900 or (888) 370-7589.

To be eligible for STRF, you must be a California resident or are enrolled in a residency program, prepaid tuition, paid or deemed to have paid the STRF assessment, and suffered an economic loss as a result of any of the following: 1. The institution, a location of the institution, or an educational program offered by the institution was closed or discontinued, and you did not choose to participate in a teach-out plan approved by the Bureau or did not complete a chosen teach-out plan approved by the Bureau. 2. You were enrolled at an institution or a location of the institution within the 120-day period before the closure of the institution or location of the institution, or were enrolled in an educational program within the 120-day period before the program was discontinued. 3. You were enrolled at an institution or a location of the institution more than 120 days before the closure of the institution or location of the institution, in an educational program offered by the institution as to which the Bureau determined there was a significant decline in the quality or value of the program more than 120 days before closure. 4. The institution has been ordered to pay a refund by the Bureau but has failed to do so. 5. The institution has failed to pay or reimburse loan proceeds under a federal student loan program as required by law, or has failed to pay or reimburse proceeds received by the institution in excess of tuition and other costs. 6. You have been awarded restitution, a refund, or other monetary award by an arbitrator or court, based on a violation of this chapter by an institution or representative of an institution, but have been unable to collect the award from the institution. 7. You sought legal counsel that resulted in the cancellation of one or more of your student loans and have an invoice for services rendered and evidence of the cancellation of the student loan or loans. To qualify for STRF reimbursement, the application must be received within four (4) years from the date of the action or event that made the student eligible for recovery from STRF. A student whose loan is revived by a loan holder or debt collector after a period of non-

collection may, at any time, file a written application for recovery from STRF for the debt that would have otherwise been eligible for recovery. If it has been more than four (4) years since the action or event that made the student eligible, the student must have filed a written application for recovery within the original four (4) year period, unless the period has been extended by another act of law. However, no claim can be paid to any student without a Social Security number or a taxpayer identification number.”

103.4 Scholarships and Financing Alternatives

A. Veterans Educational Benefits

1. CPEI is approved by the VA Educational Benefits to offer students the option of enrolling in Preparatory courses (CPE and SEC).
2. Students are responsible for ensuring they qualify for reimbursement. Students are required to receive their certificate of eligibility from the VA. Check this link: <https://www.va.gov/education/about-gi-bill-benefits/montgomery-active-duty/>
3. Students are responsible for covering the cost of tuition and any related fees and are required to seek reimbursement from the VA. This website will provide guidance for reimbursement. <https://www.va.gov/education/about-gi-bill-benefits/how-to-use-benefits/licensing-and-certification-tests/>
4. Students must **obtain verification of course completion from the CPEI Registrar** and attach it to VA Form 22-10272, January 2025, before submission.

B. Faith Group Endorsers

- a. Endorsement by one’s faith group is a requirement for those individuals who desire to pursue credentialing/certification as a chaplain.
- b. In some cases, faith group endorsers will endorse students enrolled in CPE and may offer limited financial assistance.
- c. It is the responsibility of the students to inquire as to whether this option is available.

C. Employer Tuition Reimbursement

1. Many employers offer tuition reimbursement as a benefit to their employees for continuing education.
2. It is the responsibility of the students to inquire as to whether this option is available.
3. Financing options are available through several sources such as financial Institutions, PayPal, etc.

103.5 Financial Aid and Tax Deductions

- A. 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.
- B. CPEI is not eligible to issue a 1098-T since we do not participate in the 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.

103.6 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 who fail to pay in the appropriate time and notify the Registrar will be disenrolled in the course.***

103.7 Truth in Lending Act Disclosure

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

Policy 104: 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: 10082024; 06092025

104.1 CPEI is responsible for invoicing tuition and fees.

Affiliate Organizations (AOs) or faculty members are not permitted to charge students more than the tuition established by CPEI per course.

A. Tuition Processing:

1. All tuition must be invoiced through CPEI regardless of the amount of the tuition discount.
2. Healthcare, Military, and similar Institutional affiliates shall submit the **Affiliate Discount Request Form** annually, and CPEI will invoice them directly for payment to maintain an auditable record.
3. Neither CPEI, Affiliate Organizations or faculty members are allowed to establish a payment plan for students' tuition and fees. Eligible students may seek financial assistance through PayPal or other providers.
4. Affiliate Organizations may offer student discounts, provided they adhere to the guidelines established by CPEI.

104.2 CPEI Affiliates and Discount Categories

A. CPEI Affiliates must identify specific categories for discount purposes.

B. Examples of special categories could include, but are not limited to:

1. Military Students (Active, Guard, Reserves, Retirees).
2. Student Interns in a Healthcare setting.
3. International Students
4. Other Groups (To be identified)

104.3 CPEI Affiliates, Discount Categories, and Application

A. Discounts must be applied uniformly to all students identified in a Discounted Category.

B. Examples of applied discounts:

1. Military students: 10% per military student (Active, Guard, Reserves, Retirees) per course
2. Healthcare Interns: \$500 per course (This amount could be higher or lower)
3. International Students: \$500 per course (This amount could be higher or lower).
4. Affiliates must state how they arrived at the discount.

104.4 Process for Approval of Discount Categories and Amounts

A. CPEI Affiliate Organizations will submit the following form to CPEI. **Affiliate Discount Request Form**

B. CPEI will review, approve, and maintain a copy on file.

Policy 105: CPEI's Commitment to Students' Quality Pastoral Education

Policy: A policy outlining the process for ensuring students receive quality education.

Purpose: To declare CPEI's policy, ensuring quality education and continuity of training.

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

Date Developed: April 2020

Date Reviewed: 12202020; 10012021; 03042022; 01202023; 06262023; 10082024; 01082025

105.1 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 time.

A. CPE Students

1. Only students enrolled with CPEI are allowed to participate in a CPEI Educational Cohort.
2. A minimum of three (3) and a maximum of nine (9) students is required for all CPE cohorts.
3. CPEI Supervision is limited to Active CPEI Faculty (CPEI-TSE) and CPEI Supervisory Candidates are allowed to supervise CPEI programs.
4. A course in progress that has students withdraw, thus dropping the number of enrollees below 3, has the following options. The Chief Academic Officer (CAO) must approve any exceptions.
 - 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 CPEI Faculty will consult with other ongoing CPE groups to confirm whether the remaining students can join in completing the training; otherwise, the student will be reimbursed the total amount and allowed to enroll in the next course.

B. Supervisory Candidates – the role of supervisory candidates is to learn the practice of pastoral supervision; therefore, the following guidelines are in place to ensure a balance occurs in this process.

1. SEC 600- Supervision of a CPEI cohort without a Training CPEI Faculty present is prohibited. Supervisory Candidates may observe or practice the art of pastoral supervision by providing supervision for a maximum of two (2) CPE students.
2. SEC 700- Supervision of a CPEI cohort without a Training CPEI Faculty present is prohibited. The Training CPEI Faculty must participate in the process. Supervisory Candidates are to practice the art of pastoral supervision by providing supervision for a maximum of three (3) CPE students.
3. SEC 800- Supervision of a CPEI cohort without a Training CPEI Faculty present

- is prohibited. The Training CPEI Faculty must participate in the process. Supervisory Candidates are to practice the art of pastoral supervision by providing supervision for a maximum of five (5) CPE students.
4. SEC 900- Supervisory Candidates are to demonstrate their competence as a developing CPEI Faculty member by supervising the entire course/unit and meeting with their Training CPEI Faculty for consultation and support. The Supervisory Candidate is to demonstrate their ability to include, but not limited to, interviewing and approving/denying student applications, developing the course syllabus, providing group and individual supervision, presenting didactics, and writing final evaluations. Supervisory Candidates are to practice the art of pastoral supervision by providing supervision for a group of no less than 3 (three) and no more than nine (9) students.

105.2 Teach Out Commitment

- A. CPEI commits that all students who are enrolled will receive all of the training or education under the terms of their enrollment agreements, including receiving all learning materials and student services on a timely basis, any subsequent change in this organization's accredited status or any other circumstances notwithstanding
- B. With the understanding that the intent of this Commitment is to ensure that all students enrolled by this institution before and during its period of accreditation will have the opportunity to complete their programs regardless of future circumstances, CPEI is firmly resolved that the letter and spirit of this Commitment will be fulfilled.

Policy 106: Satisfactory Academic Progress and Attendance

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 CPEI Faculty.

Date Developed: April 2020

Date Reviewed: 12202020; 12062021; 01202023; 06062023; 08202023; 10082024

106.1 Disclaimer

Clinical Pastoral Education International's programs are designed to provide a reflective and relational learning environment in which students are expected to increase self-awareness, be self-directed, and explore 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 CPEI Faculty. Additional requirements are included in the Credentialing Manual.

106.2 Educational Expectations: A course in CPE and Supervisory CPE requires a minimum of 400 hours. Each course must be completed progressively and requires the completion of LMS Educational Modules. Courses are offered in 12 and 16-week terms.

- A. The Chief Academic Officer (CAO) will conduct a review or appoint someone to review courses regularly to ensure students are meeting the requirements to be successful in the completing of the course requirements.
- B. To review the work of the CPEI Faculty in providing ongoing feedback to the students via written comments and the completion of course requirements.

106.3 Successful Completion: Course objectives and learning outcomes are designed for each course to assist the student's ability and motivation to meet the learning goals during the course in which they are enrolled.

- 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 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 CPEI Faculty. Grades for the final evaluation are based on the scale below.
- B. Certificate of Supervisory Education Programs Course Achievement 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, which will be reviewed by their Training CPEI Faculty.

106.4 CPEI Assessments and Evaluative Tools

1. The Internship Coordinator assessment. To provide feedback on the students' development and to affirm the completion of internship hours.
2. End-of-Course Survey- Students are expected to complete an end-of-course survey that will assist the Chief Academic Officer in reviewing and making recommendations for improving the course curriculum, etc.

106.5 Course Learning Rubrics

Below are examples used in CPEI for CPE and SEC Courses

CPE 100 Course Criteria	Levels		Point Value
Peer and Faculty Feedback	Exemplary	The student is clearing learning to accept feedback from one's peers and faculty member.	50
	Acceptable	The student is learning to accept feedback from one's peers and faculty member.	40
	Developing	The student is somewhat learning to accept feedback from one's peers and faculty member.	30

SEC 600 Course Criteria	Levels		Point Value
Essay: Psychodynamic Theories of Human Development and Supervision	Exemplary	The benefits and limitations of choosing a psychodynamic model of pastoral supervision were thoroughly presented and discussed.	50
	Acceptable	The benefits and limitations of choosing a psychodynamic model of pastoral supervision were articulated.	40
	Developing	The benefits and limitations of choosing a psychodynamic model of pastoral supervision were poorly presented and discussed.	30

106.6 Evaluations

- A. The mid-course evaluation- is a required 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 CPEI Faculty.

- B. The 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. CPEI Faculty will also 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 Populi in the student's electronic file.

106.7 Evaluative Policies

- A. 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.
- B. CPEI Faculty provides ongoing formative feedback on a weekly basis and summative feedback at the end of the course via a final evaluation.
- C. The evaluation tools are specific to each course, i.e., CPE 100 and 200 are designed to provide students with a Likert scale response as to how the CPEI Faculty feels the student met the learning outcomes, as well as comments related to each outcome.
- D. Grades are assigned based on the overall performance of the student.

Letter Grade	Points	Category	Evaluation
A	91-100	Exemplary	Exceeded Learning Outcomes
B	81-90	Competent	Met Learning Outcomes
C	71-80	Developing	Making Progress Toward Learning Outcomes
D	61-70	Minimal	Minimally Addressed Learning Outcomes
F	0-60	Failure	Failure to Address Learning Outcomes

106.8 Recognizing Completion

- A. **Final Evaluations:** Students will complete a final evaluation by the last day of the course and receive a final evaluation from the CPE CPEI Faculty (faculty) member within 14 days of the completion of the course.
- B. **Certificates of Completion (400 Hours):**
 - 1. Course/Unit Completion for CPE (400 Hours) [Certificate of Completion for One Course/Unit of CPE 400 Hours](#)
 - 2. Course/Unit Completion for SEC (400 Hours) [Certificate of Completion for 400 Hours-SEC](#)
- C. **Certificates of Achievement (1600 Hours)**
 - 1. Certificate of Achievement for CPE (1600 Hours)- [Certificate of Achievement for CPE \(1600 Hours\)](#)
 - 2. Certificate of Achievement for SEC (1600 Hours)-[Certificate of Achievement 1600 Hours](#)
- D. **Certificate of Completion for Professional Development Courses**
- E. **Transcripts:** Students can access an unofficial transcript copy through their Populi

account.

106.9 Absences

- A. 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.
- B. No more than 2 unexcused absences for small groups or individual supervision is allowed in order to receive credit for the course.
- C. Regular participation includes limited but is not to participation in small groups, individual supervision, completion of assigned lessons and the completion of internship hours.
- D. Actions for Non-Compliance

Students who are in non-compliance are subject to the following actions:

- 1. Discussion: The CPEI Faculty will meet with the student to discuss areas of concern and a process for improvement. If this does not address the problem, move to step 2.
- 2. Probation: Place the student on probation for the remainder of the course. This includes providing the students 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 step 3.
- 3. Administratively Withdrawn: Students who fail to meet the course requirements for at least two weeks without a legitimate explanation that the CPEI Faculty has approved may be administratively withdrawn. The refund policy will be reflected in the number of completed assignments.

106.10 Readmission Process

Students who have been administratively withdrawn may resume enrollment in CPEI upon official readmission approved by the Chief Executive Officer. The student must email the Chief Executive Officer 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.

106.11 Actions of CPEI Faculty

- 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 107: 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, credentialed members of CPEI, and staff.

Date Developed: April 2020

Date Reviewed: 12202020; 12062021; 01202023; 06062023; 06062023; 10082024

107.1 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.

- A. Be respectful and tolerant of differing opinions in the learning and internship environment.
- B. Be informed of the course and internship expectations. If you do not know or understand, ask.
- C. Be punctual and on time in all aspects of the CPE program, including the internship responsibilities.
- D. Be prepared with the course expectations. Only present work that is current and not from a previous course. Verbatims/case studies should not be any older than two weeks.
- E. Demonstrate ethical and professional behavior in the course and internship activities.
- F. Pay tuition and other fees on time.
- G. 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.
- H. Maintain confidentiality with all material shared in and outside the group.

107.2 Actions for Non-Compliance

Non-compliant students are subject to the following actions

- A. Discussion: The CPEI Faculty will meet with the student to discuss areas of concern and outline a process for improvement. If this does not resolve the issue, proceed to step 2.
- B. Probation: Place the student on probation for the remainder of the course. This includes providing the students with a written letter, which becomes part of their written record in Populi. Address specific areas that require attention. If the student does not meet the requirements move to step 3.
- C. Administratively Withdrawn: Students who fail to meet the course requirements for at

least two weeks without a legitimate explanation that the CPEI Faculty has approved may be administratively withdrawn. The refund policy will be reflected in the number of completed assignments.

107.3 Academic Appeals:

- A. Students who feel feedback from the CPEI Faculty is unfair in their final evaluation or grade may submit an appeal. [Academic Appeal Form](#)
- B. The Chief Academic Officer is responsible for reviewing and determining the outcome of the appeal. [Chief Academic Officer Review and Decision for Appeals](#)

107.4 Appeal Process:

Students can appeal the decision in response to the actions taken by the CPEI Faculty. The process is as follows:

- 1. The Chief Academic Officer will review appeal with the CPEI Faculty within 5 working days.
- 2. The CPEI Faculty will respond, in writing, within 2 working days to the CAOs' request.
- 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 10 working days in writing to:
 - a. Support the new appeal.
 - b. Deny the appeal.

Policy 108: Student Extension, Incompletes, Leave of Absence, or Withdrawals

Policy: A policy describing how CPEI Faculty or Administrative staff address the request for an extension, an incomplete, a leave of absence, or course withdrawal.

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

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

Date Developed: April 2020

Date Reviewed: 12202020; 10012021; 12072021; 01202023; 06262023; 10/07/2024

108.1 Expectations

- A. 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 during which students are enrolled.
- B. However, should students encounter circumstances beyond their control, the following options are provided.
- C. The following form must be used to request an extension, an incomplete, or a leave of absence. [Request for Extension, Incomplete, or Leave of Absence](#)

108.2 Extension Request

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

108.3 Incomplete Grade/Credit

An incomplete (I) can only be granted in very special circumstances; otherwise, the student may qualify for a brief extension as approved by the CPEI Faculty. 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.

- A. Students must have completed a minimum of 51% of the coursework and internship hours to receive an Incomplete. Students must submit a written request (email) to the CPEI Faculty requesting approval. The approval must be included in the student's Populi profile. Once the request is granted, 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 three months must be approved by the Chief Academic Officer (CAO) or the CPEI Executive Officer (CEO).
- 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.

108.4 Tuition and Refunds for Incompletes

- A. Students who 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 will be awarded.
- B. Students who 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.

108.5 Withdrawal From Course/Term

- A. CPEI's policy for withdrawal is as follows:
 - 1. Withdrawal from a 12-week course/term
 - 2. Withdrawal in Weeks 1-2 results in no transcript entry.
 - 3. Withdrawal in Weeks 2-8 results in a "W" in transcript entry.
 - 4. Withdrawal in Weeks 9-12 results in the grade earned on the student's transcript. (Final Evaluation by the Faculty member is required)
- B. Withdrawal from a 16-week course/term
 - 1. Withdrawal in Weeks 1-3 results in no transcript entry.
 - 2. Withdrawal in Weeks 4-11 results in a "W" in transcript entry.
 - 3. Withdrawal in Weeks 12-16 results in the grade earned on the student's transcript (Final Evaluation by the Faculty member is required)

108.6 Military Leave of Absence Request

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

- A. Students must submit a copy of the military orders.
- B. The length of the time requested must be approved by the CPEI Faculty for approved request.
- C. Based on the completed coursework and assignments, the student can opt for one of the following options:
 - 1. Option #1: Students not enrolled in an online course versus a hybrid course may be given the option to continue their studies.
 - 2. Option #2: Students who 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 will be awarded.
 - 3. Option #3: Students who 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.
- D. The CPEI Faculty will submit a response to the Registrar using the required Populi form once the decision is approved.
- E. Copies of the actions are maintained in the student's academic file.

Policy 109: 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, CPEI Faculty, and students.

Date Developed: April 2020

Date Reviewed: 1222020; 10012021; 01202023; 10082024

109.1 CPEI Requirements

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

109.2 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 engagement and preparatory learning with a minimum of 51% distance education.

109.3 Internships

Students identify internship sites that provide opportunities to practice the art of pastoral care. CPEI approves the internship site, and students must submit a Memorandum of Understanding (MOU) to the site coordinator that details information about CPEI and the responsibilities of the CPEI Faculty (CPEI Faculty), the student, and the site coordinator. Based on the students' needs, more than one site may be used at the time; however, each site must have a site coordinator, and a separate MOU is required. Also, students are required to submit a weekly log of hours, which becomes part of their record in Populi, with a copy provided to the Site Coordinator. At the end of the course, the Site Coordinator also submits an assessment of the students' work and affirms the students' hours.

Specific Requirements of the Internship Coordinator

- A. Educational or Professional Requirements Preferences
 - 1. Individuals who hold professional certification, i.e., APC, NACC, NAJC, CPEI.
 - 2. Individuals who hold a state or professional license, i.e., LPC, LCSW, etc.
- B. Responsibilities of the Internship Coordinator
 - 1. Address questions the student may have concerning the internship site.
 - 2. Provide an opportunity for the CPE student to have a wide variety of pastoral care opportunities for growth and development.
 - 3. Discuss any concerns or questions about the student's performance with the CPE CPEI Faculty, recognizing the learning opportunity.
 - 4. Recognize that supervision is the responsibility of the CPE Supervisor; however, this does not limit the Coordinator from providing feedback to the student as appropriate.

5. Complete a final assessment for the Intern. **Internship Coordinator Final Assessment**

- C. Students are required to have a Clinical Internship MOU on file. [Clinical Internship Manual](#).
Clinical Internship Coordinators are responsible for ensuring students complete their weekly responsibilities by **submitting the attached form**.
- D. Clinical Internship Coordinators are responsible for submitting a **final assessment at the** end of the course. See attachment.
- E. Should an incident occur at a clinical site, two forms are listed below to address these issues.

109.4 Reporting Forms

- A. **[Self-Reporting Internship Site Incident Report](#)** - This form is to be submitted when any clinician associated with CPEI encounters an incident that may result in potential risk, misinterpretation, or claim of breaching ethics (e.g. sexual innuendo, discussions about other staff members, physical touch, reports of abuse, etc.). It is important that the clinician submit this to CPEI personnel (if a SE/TSE) or a CPEI SE/TSE (if a student) as soon as possible to get ahead of the situation with integrity. Reference: Policy 107: Distance Education and Internship Requirements
- B. **[Clinical Internship Incident Report Management](#)** - This form is designed to report the management and plan for the resolution of a specific incident identified in an internship (clinical) setting, whether reported formally by the practitioner or not. Reference: Policy 107: Distance Education and Internship Requirements

109.5 Background Check Requirements

- A. Students must provide evidence of a current background check unless covered by the Internship site.
- B. Students living outside the United States are not required to provide a background check but are encouraged to do so.
- C. Recommended Affordable Source: An affordable option is Active Screening:
<https://activate.activescreening.com/app.cfm?id=9E2CCDA1-3DDE-4182-9A08-063CAF9D1807>

Policy 110: 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; 10082024; 11092025

110.1: Course Requirements

- A. CPEI Faculty will communicate to the students the requirements for earning course hours and awarding IACT CEUs at the beginning of each course.
1. 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.
 2. Contact time: Contact time is the length in which a learner and learning source interact. A contact hour is one 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.
 3. 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 51% of distance education.
 - b. IACET CEUs are awarded 300 of 400 hours or 30 IACET CEUs for each CPE/SEC course.
 - c. Allowed Activities: classroom, self-paced, distance-learning, or other projects that support a learning outcome.
 - d. Activities Not Allowed: unsupervised or unsponsored activities such as breaks, non-working lunches, or anything promotional in nature.
 - e. Calculating CEUs: 1 CEU: Contact time (Hrs.)/10 Hours -#CE or 1 CEU – 10 hours; 1 – contact hour (60 Minutes) = 0.1 IACET CEU

Activity	Engagement Learning (Example 12 Week Course)	Hours Per week	Estimated clock hours
Coursework-Engagement Learning	Group Supervision: students engage the CPEI Faculty and peers in a group supervision and presentation of written assignments, etc.	3	36
	Individual Supervision: Students are required to meet regularly with their CPEI Faculty Member.	1	12
Coursework Preparation/Engagement Learning Online	Completing LMS Modules, writing/reading, completing assignment such as self-awareness activities, didactic presentations.	4.5	54
Clinical Internship Engagement Learning	Self-Directed Internship training focuses on self-awareness and the development of personal and pastoral identity and practicing the art of pastoral supervision skills.	25	300
CPE Requirement	100 Group/Individual Learning and 300 Internship	33.5	402

Policy 111: 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, CPEI Faculty, and Students.

Date Developed: April 2020

Date Reviewed: 12202020; 10012021; 03042022; 01202023; 10082024; 0272025; 07152025; 11202025

111.1 Technology Requirements

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

- A. A computer or tablet with a high-speed internet connection
- B. Video camera
- C. Audio connection.
- D. Access to Videoconferencing, e.g., Zoom, Microsoft Teams, etc.
- E. Access to LMS

111.2 Technology Support

Technology support is provided to staff and students through communication resources, such as the website and promotional materials.

- A. Administrative staff respond to admissions, enrollment, Populi, Jotforms, and transcripts within 48 hours.
- B. Students who have questions may email their CPEI Faculty, and CPEI Faculty will respond to assignment submissions, assessment requirements, grades, etc., within 48 hours.
- C. Technology Support is available immediately through the following services.
 - 1. AI Support Agent [[click here](#)] conversational bot. Chat is enabled.
 - 2. Information and Resources [[click here](#)] PDF pages and documentation.
 - 3. Support Request [[click here](#)] form to connect with the correct point of contact based on the subject. Direct email is available for request type Executive Attention. Response leading to resolution is 1-3 business days.
 - 4. Library access and support are available Monday through Friday, 8 a.m.- 5 p.m. Eastern Time, excluding U.S. Holidays, by submitting the request using this email librarystaff@cpei.edu. A minimum of 24 hours is required before a response may be provided.

#200 Series: Policies Guiding Ethical Issues

Policy 200: Complaints, Grievances, and General Appeals

Policy: A policy outlining the complaint, grievance, and general appeals process.

Purpose: To outline CPEI's complaints, grievances, and general appeals policy.

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

Date Developed: April 2020

Date Reviewed: 10012021; 12072021; 10012022; 01202023; 06062023; 10082024; 06092025; 11172025

200.1 Definitions

- A. A complaint is an informal issue of a perceived conflict, which should be resolved at the lowest level in keeping with CPEI's values.
- B. A grievance is a formal concern presented in writing and signed. It involves an alleged grievance that has not been resolved and is need of further action.
- C. A general appeal refers to issues that address matters not satisfactorily resolved through the grievance process.

200.2 Guiding Principles

- A. Individuals should first seek to resolve any concerns at the lowest level in the spirit of CPEI's Core Values.
- B. If one's concerns are not adequately resolved the following actions may occur:
 - a. A grievance may be filed through the form listed below.
 - b. Should one's grievance still not be satisfactorily resolved, a general appeals form may be submitted. See forms below.
- C. Concerns related to an internship site, e.g., harassment/abuse (sexual, verbal, physical, emotional) must be reported to the proper authorities in that location.
- D. Issues related to accreditation may be submitted through the proper authorities listed below.

200.3 Submission of a Grievance or General Appeal

- A. A grievance must be submitted in writing within 10 days of the alleged incident. [CPEI Grievance Submission Form.](#)
- B. A CPEI general appeals form must be submitted in writing within 10 days of the grievance not being satisfactorily resolved. [CPEI General Appeals Form](#)

200.4 Process for Handling General Appeals

- A. CPEI Grievances will be distributed by the CEO or CAO to the proper authorities to be addressed. A resolution or response should be provided within (5) working days for resolution.
- B. CPEI General Appeals will be submitted to the CPEI Ethics Chair. A resolution or response should be provided within (15) working days for resolution.

200.5 CPEI Chair of Ethics Responsibilities

The ethics chair will appoint a minimum of one additional member to review the grievance and respond in writing within 15 days of receiving the appeal.

- A. Upon receiving the appeal, the ethics chair will immediately email the person who filed

the appeal to notify them of the process.

- B. The ethics chair will notify you in writing the response of the review within 15 working days, and if an agreeable solution has been reached, the matter will be settled.
- C. 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.
- D. The decision of the ethics committee or assigned mediator, whichever is needed is final.

200.6 Accreditation Complaint

- A. In the case of a complaint not being resolved at the informal level and for which a student believes an outside perspective is required, a formal complaint may be submitted to the Distance Education Accrediting Commission (DEAC). To do this, the student should follow the instructions found at: [DEAC Complaint Process](#).
- B. If the student prefers, they also 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:
 - 1. Name of Student (or individual wishing to voice their concern)
 - 2. Address of Student (or individual wishing to voice their concern)
 - 3. Phone Number
 - 4. Name of Institution
 - 5. Location of the Institution (City)
 - 6. Dates of Attendance
 - 7. A full description of the problem and any other documentation that will support your claim, such as enrollment agreements, correspondence, etc.
 - 8. The Commission process 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 significantly hinder the Commission's ability to assist you with your concerns.
 - 9. 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.
 - 10. Students enrolled in CPEI from Nebraska: "The student may contact the Program Director of Private Postsecondary Career Schools at the Nebraska Department of Education."

200.7 Maintaining Records of Filed Complaints/Grievances or Appeals and Actions Taken

Copies of filed grievances, general appeals or mediation 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 re-accreditation.

Policy 201: 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, Staff, and other Stakeholders who represent CPEI.

Date Developed: March 2024

Date Reviewed: 10082024; 06092025; 112220205

201.1 Student Recruitment Activities

- A. 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.
- B. 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.).

201.2 Recruiters for CPEI

- A. The primary recruiter for CPEI is the Chief Executive Officer.
- B. Supportive recruiters include:
 - 1. CPEI Faculty- CPEI-SE and CPEI-TSEs are recruiters for students.
 - 2. CPEI Staff
 - 3. Stakeholders (Supervisory Candidates and CPEI Board of Directors).

201.3 Names Used by CPEI Recruiters

CPEI does not use the specific title of “recruiters” but defines those with responsibilities of recruiting students by their staff or credentialing titles, i.e., Chief Executive Officer, CPE Faculty (CPEI-SE, and CPEI-TSEs), Supervisory Candidates, and CPEI Board of Directors.

201.4 Training Guidelines for Training for All CPEI Recruiting Representatives

- A. All CPEI student recruiting personnel must participate in annual training in the Fall.
- B. The annual training may include face-to-face training, video training, or other means.
- C. Upon completing the training, the participants will acknowledge participation and agree 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](#).
 - 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, disability, 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. 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.
 - 4. 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 .
5. State the approvals, accreditation, business, and employer recognition, and course acceptance requirements accurately and clearly to prospective students.
 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 with complete and accurate information about financing options for students and answer any question
 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. Always reflect 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.

201.5 Additional Requirement for CPEI Faculty

In addition to participating 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.

201.6 Maintaining Records

- A. Faculty and Staff are required to complete an Annual Self-Evaluation Form, which includes an agreement to abide by the ethical recruitment policies and a review of the Annual Training Video.
- B. Stakeholders that may be involved in recruitment are captured via the [Annual Ethical Student Recruiting Compliance Form](#)
- C. Records of compliance will be maintained in the Populi Personnel file.

201.7 Accountability

- A. 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.
- B. 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 Chief Executive Officer or Chief Academic Officer for further action. [Ethical Recruitment Violation Reporting Form](#)

201.8 CPEI Chair of Ethics Responsibilities

- A. The ethics chair will conduct an initial inquiry via a telephone or internet-based 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, and suggestions or best practices may be given to avoid future complaints or misunderstandings. The written document is not considered a disciplinary action by the review panel, but an area in which the accused may seek guidance.
 - 3. There was a significant violation.
- C. 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:
 - 1. Verbal consultation with the accused.
 - 2. A letter of Notation that describes the complaint and resolution. The letter is placed in the individual's CPEI personnel file.
 - 3. A letter of Warning that describes the complaint, actions that need to be taken, and consequences if not followed.
 - 4. 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 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 202: 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, CPEI Faculty and Students.

Date Developed: April 2020

Date Reviewed: 10112020, 12122020, 10012021;11182021; 08072022; 01202023; 08202023; 10082024

202.1 Students' Responsibilities

Students are encouraged to maintain personal copies of their administrative, financial, and training records, which include but are not limited to CPEI Completion or Achievement Certificates, CPEI Course Evaluations (Student and CPEI Faculty Evaluations), CPEI CPE Application Materials, CPEI Credentialing Application Materials.

202.2 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](#)

202.3 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 students' consent.

202.4 Student Rights

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

- A. The right to inspect and review the student's education records within 45 days of the days the CPEI receives a request for access.
 1. Students should submit written requests to the Registrar identifying 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 Registrar may also seek assistance from other administrative staff, such as technology

- support or the Chief Academic Officer (CAO), to assist with this request.
2. The right to request the amendment of the student's education records the student believes to be inaccurate or misleading.
 3. Students may ask CPEI to amend a record that they believe is inaccurate or misleading. They should write the Registrar (registrar@cpei.edu) responsible for the record, clearly identify the part of the record they want changed, and specify why it is inaccurate or misleading.
 4. FERPA was not intended to provide a process to be used to question substantive judgments that 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.
 5. 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
 6. utilizing CPEI's formal grievance process regarding the request for amendment.
 7. 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 that 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 CPEI Faculty), 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 that 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.
 8. A student may prevent disclosure in the directory information by opting out. A student may opt-out by emailing the Registrar's Office at registrar@cpei.edu.
 9. Students residing in countries that might consider their studies a violation of said country's censorship laws will automatically be excluded from the Directory Information.
 10. 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.
 11. 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, CPEI Faculty 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; 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.

12. 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 203: Retention of Student 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; 10082024

203.1 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): [CPEI Record Retention Chart.xlsx](#)

203.2 Student Records Policy

CPEI maintains a file for each student who enrolls in the institution, stating whether the student completes the educational service. Student files contain the following pertinent student records:

- A. 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:
 - 1. 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.
 - 2. Records document 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.
 - 3. Grades or findings from any examination of academic ability or educational achievement used for admission or college placement purposes.
 - 4. All of the documents provide evidence of a student's prior learning upon which the institution and the faculty base the award of any credit.
- B. Personal information regarding a student's age, gender, and ethnicity if that information has been voluntarily supplied by the student.
 - 1. Records of the dates of enrollment and, if applicable, withdrawal from the institution, leaves of absence, and graduation.
 - 2. A transcript showing all 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 for courses earned at other institutions;
 - c. Credit based on any examination of academic ability or educational achievement used for admission or college placement purposes.
 - d. The name, address, website address, and telephone number of the institution.

- e. 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.
- f. Copies of any official advisory notices or warnings regarding the student's progress.
- g. Complaints were received from the students.

203.3 Maintenance of Records

- A. CPEI shall maintain all records required above within the state of Florida.
- B. Student transcripts are retained permanently.
- C. For other student records described above, CPEI shall maintain them for a period of 7 years from the student's date of completion or withdrawal.
- D. A student record is considered *current* for three years following a student's completion or withdrawal.
- E. A record may be stored electronically if all of the following apply:
 - 1. The record can be stored without loss of information or legibility.
 - 2. 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.
- F. 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.
- G. 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.
- H. The institution's records are backed up daily.
- I. 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.
- J. In the event of closure, CPEI and its Governing Board are responsible for arranging 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.

203.4 Retention Schedule-Administrative Records

Generally, administrative and accounting records are kept for a minimum of seven years. The following are exceptions to the general rule.

- A. 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.

- B. 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.
- C. 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 and reviewed financial reports, should be kept for a minimum of ten years.
- D. Insurance, permits, and licenses are kept a minimum of three years after receiving replacement documents. In some cases, it may be appropriate to save insurance policies indefinitely.
- E. 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).
- F. 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.
- G. 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.

203.5 Auditing Procedure

- A. On an annual basis, it is the responsibility of the Executive Council or the appointed designee to select a time for record retention review and destruction. Appropriate record retention is an ongoing responsibility, and review and destruction only need to be completed on an annual basis. Review and Destruction shall be conducted as follows:
 - 1. 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:
 - 2. 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.
 - 3. Digital records are created in a way that prohibits editing or alteration.
 - 4. Digital records are maintained in a manner that they can easily be produced or reproduced in a physical form. (Federal regulations require that any previous physical record be reproducible in much the same resolution and size as the physical original.
 - 5. Records are organized in such a manner that their retention period can be identified for eventual destruction.
- B. Verify that all records are secure. Records are also maintained digitally. Digital records are secured by permission and by password access to the records storage systems. All digital records storage systems have appropriate security measures.
- C. The records destruction schedule is reviewed and approved by the Chief Executive

- Officer.
- D. Approved records are to be destroyed in an appropriately secure manner.
- E. Note that it may be decided to keep records longer than their minimum retention requirement.

203.6 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.

203.7 Access Guidelines

- A. User level – Access privileges is provided by adding users to specific documents, folders, or modules according to authorized job description needs.
- B. Guests can be added as “guest users” with the specific access terminated upon completion of the guest’s purpose.
- C. System level – Access privileges are granted for those who oversee, manage, or maintain the records system(s).
- D. Passwords – All those with access privileges must maintain secure passwords for access to the system, folders, or files.
- E. 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.

203.8 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.

203.9 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.

203.10 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.

203.11 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.

- A. 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 additions to their record.
- B. 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 to download 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.

- C. 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, date of birth, nationality, etc.). PII is information that, 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 is limited to those who need to work with it. Protection for PII in electronic files includes each system's security measures, monitoring access to systems, and password access to each system.

- D. 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 types 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 the date of the refund check.
7. Review of student records for students who have been granted accommodation 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.

203.12 Data Security

Financial and student records are maintained in the following sources.

According to the 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. Even then, CPEI has access to our records for over one year (allowing time to download reports and transfer data to another system).

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

- A. *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 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 be 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.

- B. Systems for Records Storage and Protection-CPEI does not maintain any physical student records. All records are maintained in Populi, 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. The records stored in each of these systems, data protection measures, and personnel access are described below.
- C. 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 Chief Executive Officer and Administrative Assistant.
- D. Populi- Financial, administrative, and student records are maintained in Populi.
- E. 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 is backed 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).

203.13 Password Protection for Populi Accounts

- A. Students can request a password reset should they forget theirs directly through Populi.
- B. Faculty must submit a [CPEI Support Request](#) to have their password reset.
- C. Password Protection Guidelines
 - 1. Make sure the password is 12 or more characters long.
 - 2. Include punctuation marks throughout.'
 - 3. Include upper-case and lower-case letters throughout
 - 4. Avoid memorable keyboard paths, like 123456.
 - 5. Avoid using names.
 - 6. Use a 2-step authentication method of security.
 - 7. Change your password at least quarterly.

Policy 204: Students and CPEI Faculty Rights and Responsibilities

Policy: A policy addressing staff, students, and CPEI Faculty's rights and responsibilities.

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

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

Date Developed: April 2020

Date Reviewed: 12202020; 10012021; 01202023; 10082024

204.1 Student Rights

- A. Have his or her rights respected and protected and be treated with respect.
- B. Receive quality clinical and educational experiences.
- C. Experience an environment conducive to learning.
- D. Experience an environment free from sexual harassment and other forms of harassment.
- E. Participate in planning his or her learning experience.
- F. Receive professional assessment in an atmosphere of care.
- G. File a complaint or grievance and receive due process.
- H. Expect a safe and clean working environment.
- I. Understand and agree to the financial commitment.
- J. Receive a course syllabus.

204.2 Student Responsibilities

- A. Enroll and pay the fees for each CPE or Supervisory Course.
- B. Read through the student handbook that is applicable to one's Certificate Program.
- C. Engage regularly in group and individual supervision.
- D. Participate in and take responsibility for his or her learning.
- E. Maintain absolute confidentiality in the peer and supervisory group.
- F. Maintain active participation in the internship site.
- G. Accomplish the course requirements.
- H. Protect the confidentiality of peers, clients, parishioners, and family rights.
- I. Be professional and ethical in serving clients, families, staff, and volunteers.
- J. Be punctual and present for all scheduled group and individual supervisory sessions.
- K. Demonstrate awareness and application of professional and personal boundaries.
- L. Be responsible for tuition and required fees.
- M. 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.

204.3 Staff and CPEI Faculty Responsibilities

The administrative staff and CPEI Faculty are committed to the students' success as the focus of our learning has been established for the adult learner. Based on research, adult learners:

- A. They need to know why and what they are learning.

- B. Self-concept of the learner-autonomous and self-directing.
- C. Prior experience of the learner.
- D. Readiness to learn- life-related and developmental tasks.
- E. Orientation to learning- problem-centered and contextual.
- F. Motivation to learn-intrinsic value and personal payoff.

204.4 Guidelines

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 CPEI Faculty.

- A. Create a safe learning environment.
- B. Encourage participation while respecting the learner.
- C. Provide structure but allow for flexibility.
- D. Affirm the students' contributions and presentations.
- E. Allow time for reflection and critical thinking.
- F. Challenge students to explore new approaches and opportunities.
- G. Demonstrate respect for the individual, their learning style, and experience.
- H. Be open to different perspectives.

Furthermore, the CPEI Faculty provides 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. The final evaluations are not punitive but provide a unique perspective to affirm the student's accomplishments and provide guidance for future courses or credentialing (certification).

Policy 205: 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 maintaining confidential information.

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

Date Developed: April 2020

Date Reviewed: 12202020; 12062021; 01202023; 06062023; 08172023; 10082024; 07152025; 11212025

205.1 Maintaining Confidential Information

- A. Students and CPEI Faculty are expected to maintain confidential information that is shared in groups and individual supervision.
- B. Students and CPEI Faculty are expected to maintain confidential information related to a patient, client, or other sensitive information while functioning in an internship or ministry setting.

205.2 Guidelines for Sharing Information

- A. Students are expected to follow the guidelines and policies set forth by the institution in which the internship is occurring.
- B. CPEI Faculty 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.
- C. Advise of potentially high-risk situations that one becomes aware of, 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 a history of, propensity for, or threats of violence and ensure the client is immediately referred for medical treatment.

205.3 Password Protection

- A. Students can request a password reset should they forget theirs directly through Populi.
- B. Faculty must submit a [CPEI Support Request](#) to have their password reset.
- C. Password Protection Guidelines
 - 1. Ensure the password is at least 12 characters long.
 - 2. Include punctuation marks throughout.'
 - 3. Include upper-case and lower-case letters throughout
 - 4. Avoid memorable keyboard paths like 123456.
 - 5. Avoid using names
 - 6. Use a 2-step authentication method of security.
 - 7. Change your password at least quarterly.

Policy 206: Anti-Discrimination and Harassment

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

Purpose: To ensure all participants are informed and acknowledge this policy.

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

Date Developed: April 2020

Date Reviewed: 12202020; 10012021; 01202023; 10082024; 11212025

206.1 Guidelines

- A. CPEI is committed to providing an environment free from harassment and other forms of discrimination to its students, staff, faculty and CPEI members.
- B. 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."
- C. CPEI will ensure all applicable CPEI policies and processes are listed on our website and CPE Handbooks.
- D. Failure to comply will result in a referral to the CPEI Ethics Committee for investigation and recommendation.

Policy 207: Disclosure of Conflict of Interests and Dual-Multiple Relationships

Policy: Policy for addressing conflict of interest and dual relationships.

Purpose: To declare guidance for declaring guidance for to CPEI staff and faculty.

Scope: This policy applies to all CPEI staff, CPEI Faculty, and supervisory candidates.

Date Developed: April 2020

Date Reviewed: 12202020; 10012021; 01202023; 08152023; 10012024; 11212025

207.1 Definitions

- A. Conflict of Interest occurs when an individual can affect the outcomes of courses or other decisions involved CPEI Committees by promoting products or services of a commercial interest with which he/she has a financial relationship with staff, faculty members, or students (e.g., requiring students to purchase your text for a course).
- B. Dual or multiple relationships refer to situations where a CPEI Faculty or CPEI Committee Member has various roles with a student or applicant that could negatively impact an outcome. Examples of dual relationships are when the student is also a friend, family member, employee, or business associate of the CPEI Faculty.
 - 1. If a dual or multiple relationship exists, the CPEI Faculty will recognize the issue and refer the student to another CPEI Faculty.
 - 2. If a question exists as to whether a dual or multiple relationship might exist, the CPEI Faculty is to seek consultation from the Ethics Committee Chair.

207.2 Process for Disclosing Conflict of Interest/Dual-Relationships

- A. Annually, CPEI Staff and Faculty will submit the Disclosure of Conflict of Interest/Dual-Relationship Form, which is maintained as part of Populi Records.
[Conflict of Interest Disclosure](#)
- B. CPEI Committee members will be requested to sign the Conflict of Interest if in some manner such a relationship would have a negative outcome for someone or the organization.
- C. Failure to abide by the conflict of interest/dual-relationship disclosure will be referred to CPEI's Ethics Committee for review and appropriate actions.

Policy 208: Artificial Intelligence Guidance

Policy: CPEI's policy regarding the use of artificial intelligence (AI).

Purpose: To declare CPEI's policy related to the use of artificial intelligence (AI) for students, CPEI Faculty, or credentialing submissions.

Scope: This policy applies to all students, CPEI Faculty, credentialing applicants, credentialed members of CPEI, and staff.

Date Developed: September 2024

Date Reviewed: 11212025

208.1 Artificial Intelligence

- A. Artificial Intelligence (AI) technology has provided access to language-processing aids and generative AI tools (ChatGPT, Grammarly, browser chatbots, etc.).
- B. CPEI views AI tools in the same way we view collaboration with other people and resources. Discussing ideas and working with other people is appropriate as long as the work that the student submits is their own.
- C. AI tools can be valuable to students in overcoming learning challenges, for inspiration, or for considering alternatives.
- D. CPEI values creative, original thinking and problem-solving. Therefore, AI tools should assist in learning and not replace a student's original intellectual work.
- E. We expect AI tools to be used in alignment with our values and that a student's work is original. Work that is not original and does not meet the following guidelines will be treated as academic dishonesty.
- F. Each faculty member may expand upon this policy and adapt it to specific courses or assignments.

208.2 Guidance for Students

- A. You Should.
 - 1. Double-check to ensure sources conform to the nature of the assignment.
 - 2. Consult the syllabus for each course to determine any AI policy adaptations.
 - 3. Consult the individual assignment to determine any AI policy adaptations
- B. You Should not.
 - 1. Give an AI tool your assignment prompt, final evaluations, credentialing (certification) applications, etc., and ask it to write it for you.
 - 2. Copy and paste anything from your conversation with an AI assistant back into your assignment. Instead, use your interaction with the tool as a learning experience, then let your assignment reflect your improved understanding.
 - 3. Use an AI tool without including any sort of acknowledgment (e.g., a citation or in-line statement) in your assignment.
- C. You can.
 - 1. Use AI tools to help with brainstorming and idea generation (e.g., examples of subpoints, potential research topics, etc.).
 - 2. Use AI tools for language translation or communication support for writing-based learning disabilities.
 - 3. Ask an AI tool clarifying questions about a prompt or topic you have trouble understanding.
 - 4. Copy your own work into an AI conversation and ask the tool to identify

errors or suggest edits.

208.3 Artificial Intelligence Citations

- A. APA: AI company. (Year of conversation). Name of AI tool (version) [Descriptor]. Tool URL OpenAI. (2024). ChatGPT (March 14 version) [Large language model].
<https://chat.openai.com>
- B. Chicago/Turabian: Name of AI tool, the prompt or task, date of conversation (month-day-year), AI company, tool URL. ChatGPT, response to “summarize the life of Genghis Khan,” July 19, 2023, OpenAI, <https://chat.openai.com/chat>.
- C. MLA: The prompt or task. Name of AI tool, version, AI company, date of conversation (day-month-year), tool URL. “Example of an MLA citation” prompt. ChatGPT, GPT-4, OpenAI, 30 June 2023, chat.openai.com/chat. 47

208.4 Appeals

Students have the right to appeal any charge of academic dishonesty following the steps identified the academic appeals.

208.5 Guidance for Faculty and Credentialing Committee

- A. The principle driving the aforementioned AI policy is a commitment to originality and authenticity. A faculty member’s decision to allege academic misconduct due to AI misuse should involve informed judgments on whether the AI-involved conduct compromised assignment originality and/or authenticity beyond what is reasonably acceptable.
- B. AI Detection Tips-Human Written vs. AI Generated Text
 - 1. Humans will write in a unique voice; AI writes in a predictable tone and style.
 - 2. Humans will express doubt and uncertainty; AI is likely to avoid this.
 - 3. Humans will speak freely; AI is directed by the prompt.
 - 4. I is likely to speak authoritatively.
 - 5. AI is likely to speak robotically and lacks human ‘flavor.’
 - 6. AI is unlikely to speak with sarcasm or humor unless prompted.
 - 7. AI rarely uses a passive voice and will tell vs. showing or describing.
 - 8. AI is likely to use repetitive words and phraseology to establish needless urgency.
 - 9. AI may produce well-written, but nonsensical content.
- C. Assignment Structure
 - 1. AI is likely to apply needless formatting or a structure beyond what is expected in the assignment. Look for out-of-place structuring that has a pattern but does not resemble any existing academic structure (i.e., APA, MLA, etc.).
 - 2. AI often uses repetitive vocabulary.
 - 3. Citations that are completely AI-generated may be incomplete, illegitimate, and/or nonsensical.
 - 4. Over-labeling of points or drawing excessive attention to prompt completion (i.e. firstly, secondly, thirdly; my first point, my second point, etc.).
 - 5. In cases of a direct copy/paste from ChatGPT, the font used is Segoe UI. This is not a commonly used font style in assignments. Faculty are encouraged to

specify that assignments adhere to a specific style (e.g., TNR 12 pt.).

- D. Determining Academic Dishonesty and the use of AI.- In determining the probability of academic dishonesty using AI, faculty members should make a case that indicates the preponderance of evidence suggests non-compliance with academic integrity expectations. Therefore, the faculty member needs to demonstrate that the probability that an incident of academic dishonesty has occurred outweighs the probability that it has not. Meeting this evidentiary threshold should always involve a thorough review of all available information. This information may include comparing the differences in human-written text vs. AI-generated text, analyzing assignment structure, and AI detection results when using software providing this option.
- E. Reporting of Academic Dishonesty- Any incident of academic dishonesty should be reported formally, and the faculty member should begin the action steps delineated in Policy 117 and Process 218.2 of the Policies and Processes Manual.

Policy 209: Intellectual Property

Policy: CPEI will comply with the intellectual property.

Purpose: To provide guidance on Intellectual property.

Scope: This policy applies to administrative staff, CPEI Faculty and students.

Date Developed: April 2020

Date Reviewed: 12202020; 10012021; 01202023; 08162023; 10082024; 11212025

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, pictorial or graphic works), websites, and software and databases.

209.1 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 CPEI Faculty, students, and staff. Within this context, the Intellectual Property Rights Policy is intended to:

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

209.2 Owner of Intellectual Property

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

209.3 Works Developed Within the Scope of a Signed Contract or Employment

- A. Works related to an individual's 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 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 employees' use of personal time or other facilities or resources to create the work will not change if it is related to the person's job, as described above.
- B. Works that 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
- C. 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 to 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 210: Copyright Laws

Policy: CPEI will comply with copyright laws.

Purpose: To provide guidance on the use of copyright materials.

Scope: This policy applies to administrative staff, CPEI Faculty, and students.

Date Developed: April 2020

Date Reviewed: 12202020; 10012021; 01202023; 08162023; 10082024; 11212025

210.1 Copyright Guidance

- A. "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>
- B. 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>
- C. Mandated in the Fair Use Law, CPEI Faculty includes:
 - 1. Purpose: Does the use meet the educational objectives/outcomes of the portions used? 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.
 - 2. Effect: Does the use harm the current market value or sale of the copyrighted material?
 - 3. Cited: Materials used in any resources (printed, web, etc.) must be clearly cited.

210.2 Requesting Permission

- A. Requests to use copyrighted materials/resources must be submitted and maintained on file.
- B. Requesting permission includes identifying:
 - 1. The specific item requested for use.
 - 2. The purpose of the use.
 - 3. The author, title, and the number of copies.

Policy 300: Content and Student Learning Outcomes (SLOs)

Purpose: To provide a process to ensure that the course content/syllabi logically support the learning outcomes

Responsible: Chief Academic Officer

Date Developed: April 2020

Date Reviewed: 10072020; 10012021; 01202023; 10082024; 11092025

300.1 The Chief Academic Officer Responsibilities

- A. Evaluate course content to ensure it addresses the learning course outcomes.
- B. Enlist Subject Matter Experts (SMEs) to assist in the development of course content to address the learning outcomes.
- C. Ensure needs assessments, end of course surveys, and other evaluative tools are in place to determine whether training is being conducted according to standards.
- D. Review and analyze needs assessments, post-course assessments, and other evaluative tools to determine if changes are needed and recommend changes to the EC.

300.2 CPEI Faculty Responsibilities

- A. Instruct students.
- B. Prepare syllabi that aligns with the course learning outcomes.
- C. Deliver didactic materials that embrace student learning.
- D. Recruit subject matter experts to present didactic materials related to specific learning outcomes.
- E. Facilitate individual and group supervisory sessions.
- F. Complete 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 various 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.
- K. Preparing students for success in a credentialing review should be the goal of the supervisor-educator.

300.3 Principles to Consider in the Development of Content and Outcomes

- A. Use of the Curriculum Development Handbook.
- B. Nature of learning experience.
- C. The context is established on principles of adult education and the action/reflection/action method of learning.
- D. CPEI Faculty's teaching style.
- E. CPEI Faculty' knowledge of students includes their religious, spiritual, educational, social, and cultural backgrounds.
- F. Consideration of the institutional, course, and individual learning objectives and outcomes

300.4 Recruit Subject Matter Experts (SME) Responsibilities

- A. Review topics of interest identified by the students in the post-course assessments.
- B. Discuss new material on relevant topics with CPEI Faculty.
- C. Select SMEs to develop content to match learning outcomes.
- D. Share updated content with CPEI Faculty to be implemented and evaluated.
- E. Continually adjust the didactics and other resources as necessary based on the feedback and continue the process again.

Policy 301: Course Content Review

Policy: The Chief Academic Officer 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; 10082024; 11212025

301.1 Actions

- A. **January: (Technology Support and Director of Marketing):** Implement changes in CPE handbooks and LMS modules, distribute approved changes to all CPEI Faculty, and develop didactic or other educational resources.
- B. **April: (CPEI Advisory Council):** Receive feedback from (external stakeholders) to determine current needs and changes in the workplace.
- C. **October: (Chief Academic Officer):** Recommend changes, additions, or modifications to the Executive Council (EC) for review and approval before submission to the CPEI Board of Directors.
- D. **November: (CPEI Board of Directors):** Review the recommendations.

301.2 Creation of New Programs or Courses

- A. Use the CPEI Curriculum Development Manual as a guide.
- B. Solicit feedback from prospective users, students, and others to determine the need for a new program or course.
- C. Based on feedback, enlist subject matter experts (SMEs) to develop the new program or course.
- D. Submit the revised program or course curriculum to the Executive Council (EC) for approval.
- E. Submit approval for accreditation.
- F. If approved, train the new program or course for a minimum of 12 months.

Policy 302: 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; 0120202; 10082024; 11212025

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

302.1 Curriculum Development Manual-Chief Academic Officer Responsibilities

- A. Ensure course content is current, and the course objectives and outcomes meet the needs of distance education.
- B. Enlist Subject Matter Experts (SMEs) to assist in the development of course content.
- C. Ensure assessments, post-course assessments, and other evaluative tools are in place to determine whether training is being conducted according to standards.
- D. Ensure changes are inserted into CPE handbooks, etc.
- E. Ensure that the CPEI Faculty and Supervisory Students remain informed of changes or additions.
- F. Recommend changes in curriculum or programs to the Chief Executive Officer (CEO) and the Executive Council.
- G. Work with the Director of Marketing (marketing@cpei.edu) to ensure current items such as the Academic Catalog and Marketing Resources.

302.2 CPEI Advisory Council

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

302.3 ADDIE Instructional Model of Learning



A. CPEI Course Developers- *Minimum 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. Working knowledge of learning management systems.
5. Familiarity with current educational technology.
6. Familiarity with online learning and modalities
7. Familiarity with the content of pastoral care or pastoral counseling.
8. Ability to communicate effectively in written form.

Duties:

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

B. CPEI Instructional Designers: *Qualifications*

1. Completion of a certificate or an educational degree course in instructional design.
2. Knowledge of adult learning theories 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 the content of pastoral care or pastoral counseling.
6. Demonstrate critical and analytical thinking skills.
7. Demonstrate the ability to collaborate effectively and work as part of a team.

Duties:

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 meets 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.

As one seeks to develop learning outcomes, they must be built on one another and align with Bloom's Revised Taxonomy.

Level	Remember	Understand	Apply	Analyze	Evaluate	Create
4	Identify Appropriate Use	Predict, Execute	Use, Construct	Deconstruct	Reflect, Action	Create, Actualize
3	Recall Tabulate	Clarify Predict	Carry Out Calculate	Integrate Differentiate	Judge Conclude	Design Compose
2	Recognize Describe	Classify Interpret	Provide Experiment	Differentiate Explain	Determine Assess	Assemble Plan
1	List	Summarize	Respond	Select	Check Rank	Combine

Policy 303: Formal Needs Analysis

Purpose: To describe the process of conducting a needs analysis to identify gaps in the educational process.

Responsible: Chief Academic Officer

Date Developed: April 2020

Date Reviewed: 093/2020; 10012021; 01202023; 10082024; 12172024;1092025; 11/17/2025

303.1 CPEI's Outcome Assessment Plan

A review of CPEI's Outcome Assessment Plan is critical to this process, as well as the CPEI Curriculum Manual.

- A. Needs Assessment: A systematic process to gather data that is appropriate and sufficient to develop an effective educational program that will address the needs and wants (gap).
- B. Gap: the difference between the current state of "What is" and the desirable or achievable state of "What should be or desired."
- C. Methods for Measuring Student Outcomes Achievement
 - 1. Indirect Assessment Indicators
 - a. External Continued Education (CE) Development evaluative process, papers, reflections, etc.
 - b. Papers, Reflections, etc.
 - 2. Direct Assessment Indicator
 - a. Assessment of students meeting the learning outcomes as represented by scores on final evaluations.
 - b. Assessment of quizzes and objective instrument scores.
 - 3. Method for Measuring Faculty Teaching Effectiveness
 - a. Student end-of-course assessments provide data on curriculum content, student perceptions of available resources, and the interaction with the faculty.
 - b. Annual Summative Evaluation (Performance Reviews)
 - c. Formative Evaluations Based on periodic review of faculty engagement with student assignments, etc.
- D. Methods for Measuring Institutional Success- Indirect Assessment Indicator- Graduation rate of students completing the CPE and Supervisory Educational Programs.
- E. Analysis- A benchmark of >80% evaluates each indirect and direct measure.
- F. Sharing Results and Recommendations
 - 1. Certificate Programs
 - a. The Chief Academic Officer will collect and analyze assessment data and recommend changes to the Executive Council, along with a date for implementation.
 - b. Recommended changes will be shared with the CPEI Faculty.
 - 2. Professional Development Courses

- a. The Professional Development Committee will evaluate the results from the assessment of Continued Education courses and recommend changes and a date for implementation.
- b. Coordinate with the Web Designer to implement approved changes.

#400 Series: Policies Guiding Communication and Marketing

Policy 400: External Communications Policy

Policy: The external communications policy outlines requirements for publicly disseminating information.

Purpose: The purpose of this External Communications Policy is to establish guidelines for all external communications of Clinical Pastoral Education International (CPEI) to ensure they reflect our mission, values, and professional standards.

Scope: This policy applies to all CPEI staff, board members, volunteers, and any individuals or entities authorized to communicate on behalf of CPEI.

Date Developed: April 2024

Date Reviewed: 10082024; 11212025

400.1 Objectives

- A. Consistency: Ensure all external communications are consistent with CPEI's mission and values.
- B. Professionalism: Maintain a high standard of professionalism in all communications.
- C. Alignment: Ensure all messages align with the strategic goals of CPEI.

400.2 Communication Channels

- A. Website: The official CPEI website.
- B. Social Media: Official CPEI social media accounts (e.g., Facebook, Twitter, LinkedIn, YouTube, etc.).
- C. Email: Official CPEI email communications, including newsletters.
- D. Press Releases: Official announcements distributed to media outlets.
- E. Public Statements: Any public statements or speeches made on behalf of CPEI.

400.3 Content Approval Process

- A. Submission: All proposed external communications must be submitted to the Marketing Director for review.
- B. Review: The Director of Marketing and designated team members will review the content to ensure it aligns with CPEI's mission, values, and professional standards.
- C. Approval: The Director of Marketing must approve all content before dissemination. Content may be referred to the Chief Executive Officer for final approval.

400.4 Member Promotions

CPEI recognizes its members' achievements and supports the promotion of their publications, CPEI Affiliate Organizations, and practices, provided they align with the organization's mission and values.

- A. Eligibility: Publications, CPEI Affiliates, and practices established or authored by CPEI members that support the mission and values of CPEI.
- B. Submission: Members must submit the following for review:
 - 1. Summary of their book, work, or practice
 - 2. Relevance to CPEI's mission
 - 3. Author's, members', or founder's statement on how the work supports CPEI's values
- C. Review and Approval: The Marketing Team will review submissions. Approved works will be promoted through CPEI's official channels.
- D. Promotion Channels: Website, newsletters, social media.

400.5 Crisis Communication

In the event of a crisis or emergency, CPEI will follow the established *Crisis Communication Plan* to ensure timely, accurate, and consistent communication. Only designated spokespersons are authorized to communicate on behalf of CPEI during a crisis.

400.6 Media Relations

- A. Spokespersons: Only designated spokespersons are authorized to speak to the media on behalf of CPEI.
- B. Press Releases: The Director of Marketing and/or Chief Executive Officer must approve all press releases.
- C. Interviews: Requests for interviews must be directed to the Marketing Director. The designated spokesperson will be briefed and prepared for the interview.

400.7 Social Media Policy

- A. Content Guidelines: Social media content must reflect CPEI's mission, values, and professionalism.
- B. Engagement: Respond to comments and messages in a respectful and timely manner.
- C. Personal Accounts: Staff and members should clearly differentiate personal opinions from official CPEI positions when using personal social media accounts.

400.8 Confidentiality and Privacy

All external communications must respect the confidentiality and privacy of individuals associated with CPEI. Personal information should only be shared with explicit consent and by relevant privacy laws.

400.9 Accessibility

CPEI is committed to making all communications accessible to diverse audiences. This includes providing materials in accessible formats and ensuring digital content adheres to web accessibility standards.

400.10 Review and Compliance

The Director of Marketing and the Chief Executive Officer will review this policy annually to ensure its effectiveness and relevance. Non-compliance with this policy may result in disciplinary action.

Contact Information

For questions or further clarification on this policy, please contact the Director of Marketing at marketing@cpei.edu

Policy 401: CPEI Brand Use Policy

Policy: The brand use policy outlines the requirements for the proper use of the CPEI name and logo.

Purpose: The purpose of this policy is to encourage and guide the use of the Clinical Pastoral Education International (CPEI) brand by CPEI Affiliates. Proper use of the CPEI name and logo reinforces our reputation and identity.

Scope: This policy applies to all CPEI affiliates, partners, and contractors who use the CPEI name and logo in any marketing, promotional, or communication materials.

Date Developed: April 2024

Date Reviewed: 10122024; 11212025

401.1 General Principles

The CPEI name and logo, including the CPEI's domain name (www.cpei.edu) should be used to promote the values and mission of our organization. All uses should reflect the integrity and professionalism of CPEI.

401.2 Encouraged Usage

Affiliates are encouraged to use the CPEI name and logo in:

- A. Marketing brochures and flyers
- B. Websites and online platforms
- C. Promotional items and merchandise
- D. Event materials and signage

401.3 Usage Guidelines

To ensure brand consistency, the following guidelines must be followed: see the *CPEI Style Sheet* on Page 2 of this Policy. The CPEI name and logo may be produced in greyscale or black and white, but there should be no variations on the CPEI name, logo, domain name, or colors.

Affiliates must disclose the following statement on their websites and other promotional materials: *"CPEI is accredited by the Distance Education Accrediting Commission (DEAC), which is listed by the U.S. Department of Education as a recognized accrediting agency and recognized by the Council for Higher Education Accreditation (CHEA)."*

401.4 Approval Process

Affiliates should submit materials featuring the CPEI name, logo, and domain name to the Director of Marketing at marketing@cpei.edu for review. The review process ensures that all uses align with CPEI's brand standards. Allow three business days for approval.

401.5 Trademark and Copyright Information

The CPEI name and logo are trademarks of Clinical Pastoral Education International. CPEI Affiliates are authorized to use these trademarks in accordance with this policy.



401.5 Codes for CPEI Color Palette

- A. Blue RGB: 1, 80, 149
- B. Orange RGB: 240-105-36

401.6 Consequences of Non-Compliance

Non-compliance with this policy may result in corrective actions, including the revocation of usage rights or other appropriate measures.

401.7 Review and Amendments

This policy will be reviewed annually and updated as necessary. CPEI Affiliates will be notified of any changes.

Contact Information For questions or to seek approval for logo use, please contact the Director of Marketing at marketing@cpei.edu.

Policy 500: Affiliate Organizations

Policy: CPEI's policy for CPEI Affiliate Organizations.

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

Scope: This policy applies to all Affiliate Organizations.

Date Developed: April 2023

Date Reviewed: 04292023 06062023; 10082024; 07072025; 11172025

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

500.1 Descriptions

- A. Affiliate organizations are for-profit, non-profit, limited liability corporations, or other legal entities that exist primarily to assist CPEI in accomplishing its mission.
- B. A credentialed CPEI Faculty must be part of an affiliate organization.
- C. CPEI does not accredit affiliate organizations. However, a Memorandum of Understanding (MOU) is signed between both parties.

500.2 Classification of Affiliate Organizations

To support accurate reporting, resource allocation, and accountability, CPEI classifies affiliate organizations based on enrollment, financial standing, and compliance with policies and procedures.

500.3 Purpose

This classification is intended solely for internal administrative tracking and planning purposes and is not punitive. Affiliates designated inactive will retain affiliation status but may experience adjusted support levels, reporting expectations, and eligibility for CPEI resources until reactivation.

500.4 Affiliate Application Process

- A. An Organization or CPEI SE/TSE desiring to affiliate with CPEI will complete an Affiliate Organization Application and pay for the application. [**Affiliate Organization Application.**](#)
- B. Annual renewal fees are established by the Finance Committee.
- C. Prorated Fees may apply for the first year's Annual Fees.
 - 1. Applications submitted after April 1, but before July 1 will receive a 1/4 prorated fee.
 - 2. Applications submitted after July 1, but before October 1 will receive 1/2 prorated fee
 - 3. Applications submitted after October 1 but before January 1 will receive 3/4 prorated fee.
- D. Upon submission of the application, the **Chief Finance Officer (CFO)** will:
 - 1. Review the application and submit the Approve/Reject approval form in Populi, which will provide the terms/fees form for the applicant to submit.
 - 2. If approved, the **Chief Finance Officer (CFO)** or Registrar will:

3. Create a Folder in the Populi Affiliate Group.
 4. Download the MOU and other required documents and upload them to the AO Folder.
- E. Affiliation is contingent upon the timely submission of fees, MOU, and compliance documentation. Application fees and annual renewal fees are non-refundable.

500.5 Tech Support: Upon approval, the Terms and Fees Form will:

- A. Create a campus for the newly approved Affiliate in Populi
- B. Leverage the single CPE and SEC applications used by all Affiliates in Populi

500.6 Registrar: 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 Director of Marketing (marketing@cpei.edu) once payment has been received.
 1. The Director of Marketing will create a link on the CPEI Website.
 2. Provide the Affiliate Organization with a certificate.

500.7 Annual Requirements

- A. CPEI Faculty will complete the annual CPE CPEI Faculty contractual form.
- B. Affiliate organizations will submit renewals of annual fees. Annual renewal fees are due in full; no discounts or prorated adjustments apply.

500.8 Maintaining Records and Compliance

- A. A CPEI Affiliate Organization Memorandum of Understanding (MOU) is required to be on file.
- B. Compliance Requirements
 1. 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 the **Chief Financial Officer** at finance@cpei.edu stating reasons for non-compliance.
 2. Affiliate Organizations' Annual Renewal Fees are due December 1- no discounts are provided for annual renewals.
 3. Affiliate organizations failing to meet this requirement by December 31 will be placed on probationary status. Late Fees: a 10% late fee is added to the annual fee.
 4. Affiliates failing to meet compliance requirements within 60 days of notice will be subject to probationary or inactive status, consistent with policy definitions.
- C. Affiliates must disclose the following statement on their websites and other promotional materials once we are accredited, *"CPEI is accredited by the Distance Education Accrediting Commission (DEAC), which is listed by the U.S. Department of Education as a recognized accrediting agency and recognized by the Council for*

500.9 Definitions of Affiliate Status

- A. Active Affiliate
 - 1. Active affiliates have registered students in either a 16-week or 12-week academic term during the most recent two academic terms
 - 2. Active affiliates are current in all financial obligations to CPEI, including tuition, fees, and contractual commitments.
 - 3. Active affiliates remain in good standing with CPEI policies and compliance requirements.
- B. Inactive Affiliate
 - 1. Inactive affiliates have not registered any students with CPEI for two or more consecutive academic terms (defined as 16-week or 12-week terms).
 - 2. Inactive affiliates may also be considered inactive if financial obligations remain delinquent beyond 60 days or if compliance requirements are not met.

500.10 Affiliate on Compliance Notice (60-Day Status)

An affiliate organization that has been formally notified of deficiencies in compliance with CPEI policies and procedures.

- A. A 60-day period is granted to resolve outstanding issues, including financial delinquency, reporting requirements, or operational standards.
- B. Failure to resolve deficiencies within the notice period may result in reclassification as "Inactive Affiliate" or termination of affiliate status.

500.11 Non-Compliant Affiliate

- A. Has failed to meet CPEI's policies, processes, and compliance standards after notice and remediation opportunities.
- B. Is subject to suspension or removal from CPEI's affiliate directory and may lose eligibility for student enrollment, credentialing, or partnership benefits

500.12 Reactivation

An inactive affiliate may return to active status by enrolling students in a CPEI academic term and resolving any outstanding financial or compliance obligations. CPEI will provide assistance and resources upon request to help re-engage inactive affiliates.

500.13 Fairness and Non-Discrimination:

This policy will be applied consistently across all affiliate organizations. The classification process will be based solely on documented student enrollment activity and will not take into account factors such as geography, size, religious affiliation, or leadership composition. All affiliates will be evaluated against uniform financial and compliance standards in addition to enrollment activity.

500.14 Discontinuation of Affiliate Organizations

- A. Affiliate Organizations that fail to submit the MOU or required annual CPEI Faculty report after 60 days of the due date will have their affiliation status revoked until such time that the AO is brought into compliance.

- B. Affiliate Organizations that fail to submit annual fees within 60 days of the due date will have their affiliation status revoked.
- C. Affiliate organizations with revoked status will have student applications discontinued via Populi.
- D. To avoid probation or discontinuation, affiliates must submit a written compliance plan to the **Chief Financial Officer** at **finance@cpei.edu** within the 60-day window.
- E. Revoked affiliates may only regain active status upon full compliance with financial, enrollment, reporting requirements, and approval from the Board of Directors subcommittee.

Policy 501: CPEI and Educational Institutions and Legal Agreements.

Purpose: To set forth guidelines for establishing and overseeing CPEI and educational institutions.

Scope: This policy applies to CPEI and CPEI Affiliate Organizations.

Date Developed: February 2025

Date Reviewed:

501.1 Definitions

- A. **Articulation Agreement** is a formal, written contract between two or more educational institutions that outlines how credits are transferred between them. It is a binding legal document that allows students to transfer credits from one school to another without dual enrollment.
- B. **Consortial agreement** is a formal partnership or collaboration between multiple educational institutions, organizations, or entities to achieve shared educational goals or pool resources for mutual benefit. These agreements can involve a variety of activities, such as joint academic programs, shared research, faculty exchanges, or resource sharing. The intent is to enhance educational opportunities, improve efficiency, and broaden access to resources that may not be feasible for individual institutions to provide independently.

501.2 Initiating Relationships with Educational Institutions

CPEI or Affiliate Organizations (AO) may initiate contact with an educational institution to establish an agreement.

501.3 Affiliate Organization Responsibility

- A. Affiliate Organizations are responsible for providing CPEI with educational institutional information, such as the name of the school, the address of the school, the date to begin the agreement, and the points of contact to CPEI.
- B. Affiliate Organizations are required to abide by the requirements outlined in the signed Articulation Agreement, which includes but is not limited to:
 - 1. Following CPEI's Policies and Processes, which include tuition, discounts, refunds, etc.
 - 2. Ensuring final grades are completed within the 14-day period following the end of a course/term.

501.4 CPEI's Responsibility

- A. CPEI is responsible for creating and overseeing the agreements with any educational institution.
- B. CPEI will provide a copy of the agreement to the Affiliate Organizations (AO) once all parties have signed it.
- C. CPEI's Registrar will submit a copy of the student's grade to the educational institution within 15 days after a course/term ends.

Policy 502: Affiliate/Individual Access to CPEI's Learning Management System (LMS)

Policy: To articulate guidelines for access to CPEI's LMS (Populi) and assigned roles.

Purpose: to facilitate effective participation while maintaining controlled access to organizational data. Populi has a wide spectrum of security privileges available (User roles – Populi Knowledge Base)

Scope: This policy applies to CPEI and CPEI Affiliate Organizations.

Date Developed: May 2025

Date Reviewed:

502.1 Tiered Access for Affiliates and Members

- A. Individual (Member/Student) Access:
 - 1. Purpose: Empower members to engage with event modules and update basic profile details without compromising core operations.
 - 2. Permissions include:
 - a. Read-only access to key internal data
 - b. Limited self-service editing for updating basic profiles
 - c. No access to highly sensitive administrative functions
- B. Supervisor/Educator Access
 - 1. Purpose: Provide enhanced access for those with greater involvement (e.g.,
 - 2. Permissions include:
 - a. Broader editing capabilities for detailed personal and program data.
 - b. Role-specific functionalities as defined by operational requirements
- C. Affiliate Access
 - 1. Purpose: Provide enhanced access for those with greater involvement (e.g., committee leads, program coordinators).
 - 2. Permissions include:
 - a. Broader editing capabilities for detailed personal and program data
 - b. Role-specific functionalities as defined by operational requirements
- D. Administrator Access
 - 1. Purpose: Empower administrators within their core role of the parent organization to engage with event modules and update profile details without compromising core operations.
 - 2. Permissions include
 - a. Read/Write access to key internal data
 - b. Full policy adjustments, user management, and audit
 - c. Full access to highly sensitive administrative functions

502.2 Role Definition & Role Assignment

- A. Admissions Admin
 - 1. Admissions Admins have access to all admissions information at CPEI. They have unique access to Admissions > Settings; this includes application design, lead routing, inquiry form settings, and custom admissions fields.
 - 2. Admissions Admin users are automatically given the Staff role; additionally.
 - a. They have full read/write access to everything under Home except the

Academics view.

- b. They can't enroll in or teach courses.
- c. They have full read/write access to all information on Profiles in the Activity Feed, Info, and Admissions views. They can see a faculty user's Faculty view.
- d. They can give others the Admissions Admin, Admissions, Student, and Staff roles.

B. Admissions

- 1. Admissions users have access to all admissions information at CPEI, except for Admissions > Settings.
- 2. Admissions users are automatically given the Staff role; additionally.
 - a. They have full read/write access to everything under Home except the Academics view.
 - b. They can't enroll in or teach courses.
 - c. They have full read/write access to all information on Profiles in the Activity Feed, Info, and Admissions views. They can see a faculty user's view.
 - d. They can give others the Admissions, Student, and Staff roles.

C. Academic Admin

- 1. The Academic Admin role gives users access to all academic information at CPEI.
- 2. Academic Admins are automatically given the Staff role; additionally...
 - a. They have full read/write access to everything in Home.
 - b. They can't enroll in or teach courses; they can, however, view and edit all course information (including assignments, grades, enrollment info, etc.).
 - c. They have full read/write access to all information on Profiles except for Financial (also, see Discipline).
 - d. They can give any person the following roles: Academic Auditor, Admissions, Advisor, Campus Life, Discipline, Faculty, Registrar, Staff, Student, and Teaching Assistant.

D. Advisor

- 1. Advisors have read-only access to the academic information for the students they are advising.
- 2. They can view contact information for their advised students.
- 3. They cannot enroll or register students in courses.
- 4. They cannot give any person a user role.

E. Registrar

- 1. The Registrar role gives a user access to almost all academic information at CPEI.
- 2. Registrars are automatically given the Staff role.
- 3. They have full read/write access to everything in Home except for Settings.
- 4. They enroll students in courses and have access to view assignments, grades, enrollment info, etc.).
- 5. They cannot teach courses or edit assignments or grades without the

approval of the Chief Academic Officer.

6. They can give others the Admissions, Advisor, Campus Life, Faculty, Staff, Student, and Teaching Assistant roles.

F. Financial Admin

1. The Financial Admin role gives a user access to all financial information at CPEI. The role allows complete read/write access to all billing- and accounting-related information; it has read-only access to financial aid.
2. Financial Admins are automatically given the Staff role; additionally...
 - a. They have read/write access to all information and settings in Billing, Accounting, Donations, Campus Life, and Bookstore.
 - b. They have read-only access to Financial Aid; they also can complete a disbursement batch.
 - c. They can give others the Financial Admin, Student Billing, Bookstore Admin, / Campus Life, Donations, and Staff roles.

G. Staff

1. The Staff role gives a user access to basic information for people and organizations.
2. They have read/write access to these sections of Home: Home, My Profile, Files, Contacts, and Communications.
3. They can manage the News feed via Home > Manage News.
4. On Profiles, they have read/write access to the Activity Feed, Bulletin Board, and Info views. They can also add and edit tags. They cannot see any academic information on the Student view, nor can they see financial information on the Campus Life or Financial views.

H. Faculty and Teaching Assistants

1. Faculty and Teaching Assistants have comprehensive access to the courses in which they are so listed.
2. Unless they are set to Hidden (students cannot see that they are observing the course) or Read-only (they can see everything regular faculty can, but cannot otherwise interact with the course)
3. They cannot change basic course information (e.g. abbreviation, meeting times, etc.).
4. If the Enrollment setting (on Course > Info) is set to allow faculty to manage enrollment, then course Faculty can manage all enrollment functions for that course—including enrolling students, changing student status, and changing course names on the Roster
5. Faculty cannot change courses once they have been finalized.
6. They can see public contact information.

I. Students

1. The Student role enables an individual the ability to be enrolled in or audit courses. It also prompts Populi to begin recording an academic history for that person.
2. For all courses, they have read-only access to Dashboard, Info, Assignments, and Calendar.
3. If enrolled in a course, they can interact with assignments, lessons, discussions, and tests. They can also create new discussions. If enabled

- on Course > Info, Auditing students can have similar access.
4. On their own profiles, they can see the Bulletin Board, Info, Student, and Financial views.
 5. On Student, they can read their transcript, degree audit, and any information entered in the right column (Courses, Degrees, etc.). They can export an unofficial transcript, schedule, and grade report.
 6. On Financial, they can read all of their financial and financial aid information, make payments, download statements and 1098-Ts, work on financial aid applications, and accept/decline financial aid awards.
 7. On other people's Profiles, they can see all public contact information for staff, faculty, and other students.

502.3 Role-Based Access Control (RBAC) Matrix

The following matrix provides an editable overview of role assignments and their corresponding access levels:

Role	Populi Assignment	Viewing Rights	Editing Rights	Administrative Rights
Member/Student	Student	Limited – basic profile, events info	Minimal – profile updates only	None
CPEI Faculty*	Faculty	Enhanced – specific to supervisory functions	Enhanced – ability to update supervisory records	Limited – typically requires Administrator oversight
Affiliate	Faculty	Broader – program details, events, reports	Moderate – content and scheduling updates	Limited – may require supervisory approval
Administrator	Core Role Admin Admissions/Academic/Financial)	Full – access to all modules and data	Full – content and data management	Full – policy adjustments, user management, and audit

502.4 Implementation & Monitoring

- A. Establish a documented process for monitoring access and adjustments to roles – which at a minimum should be reviewed and signed off at the beginning of each scheduled term and retained in term reporting folder by Registrar.
- B. Schedule regular reviews (quarterly or annually) to ensure that access levels remain appropriate and secure – which at this time will be set to an annual review signed off by Registrar, CAO, Tech Director and retained in annual reporting folder by Registrar.

Policy 503: CPEI Faculty

Policy: The policy defines the roles of Clinical Pastoral Education (CPE) and Supervisory Education Faculty.

Purpose: To identify the requirements for CPEI's Faculty

Scope: This policy applies to individuals credentialed as a CPEI-SE and CPEI-TSE.

Date Developed: March 2024

Date Reviewed: 10082024; 11172025

503.1 Educational Requirements

- A. CPEI Faculty Educational Requirements
 1. Holds a 36-hour graduate theological degree or equivalent
 2. Four courses/units of Supervisor Candidate Education (1600 hours)
 3. Certified as a Board-Certified Chaplain (BCC)
 4. Qualified to train CPEI CPE students only.
- B. Training CPEI Faculty (CPEI-TSE) Requirements
 1. Supervised for a minimum of 2 years, credentialed as a Supervisor Educator (or equivalent).
 2. Holds a 36-hour graduate theological degree or equivalent
 3. Completed four courses/units of CPE and four courses/units of Supervisory Education (1600 hours)
 4. Certified as a Board-Certified Chaplain (BCC).
 5. The CPEI Faculty (CPEI-SE) is recommended or volunteers to apply.
 6. Completes the CPEI-TSE Readiness Assessment form: [Assessing Readiness as a Training CPEI Faculty \(populiweb.com\)](https://populiweb.com)
 7. Meets for review with the credentialing committee and the Chief Academic Officer
 8. Upon approval, the applicant will complete the TSEC Orientation Course and will be qualified to train CPE and Supervisory Education Students.

503.2 Defining Active and Inactive Faculty

- A. **Teaching Faculty** are defined as either active or inactive and will be reviewed and reassigned each academic year.
 1. An Active Faculty Member describes individuals who have taught at any time during an academic year.
 2. Inactive Faculty Member may remain in that status for a maximum of two (2) academic years before being administratively removed from a faculty designation and:
 - a. Be moved to a "credentialed" designation.
 - b. Be removed from CPEI personnel and member lists entirely.
- B. **Credentialed members** include individuals who have expressed their desire not to teach yet wish to maintain credentialed membership.
- C. **Non-Teaching Faculty** describes CPEI Staff and Administrators who may have earned faculty status but for whom teaching is not part of their contracted responsibilities.
- D. **Emeritus Faculty** refers to those who have demonstrated a career of effective and distinguished teaching. These individuals will be designated as Emeritus by the CPEI Board of Directors.

503.3 Continuing Education

- A. Active faculty members are required to participate in the annual faculty training, complete the yearly self-performance review and the annual continuing education requirements.
- B. Non-active and Credentialed members are required to complete the annual continuing education requirements.
- C. Continued Education Requirements include a minimum of 15 contact hours or 1.5 IACET CEUs annually.
 - 1. Supervisory Skills/Competencies
 - 2. Ethics and Supervision
 - 3. Multiculturalism and Supervision
 - 4. The remaining hours should supplement the continuing professional development as a CPEI Faculty.

503.4 Annual Self-Performance Review

All active Faculty are required to complete an [annual self-performance review](#) during the month of October.

Policy 504: Annual Performance Review for CPEI Staff and Faculty

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

Responsible: CPEI Chief Executive Officer, Chief Academic Officer, and others.

Date Developed: April 2020

Date Reviewed: 092920; 121720; 10012021; 01202023; 0312024; 10082024; 12282024; 11232025

504.1 CPEI Annual Performance Review Process

A. CPEI Chief Executive Officer:

1. October: The Chief Executive Officer will provide a copy of the annual report to the CPEI Board of Directors.
2. November: The Chief Executive Officer will submit an annual performance review to the CPEI Board of Directors
3. November: The CPEI's Board of Directors Chair will provide an annual evaluation to the Chief Executive Officer. [CPEI Chief Executive Officer Annual Performance Review.docx](#).

B. CPEI Staff Annual Performance Review

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, a 90-day notice will be given.

October: Staff Reviews:

1. The Chief Executive Officer reviews the Chief Academic Officer, Chief Financial Officer, Director of Marketing, Director of Technology, and other approved staff.
2. The Chief Academic Officer reviews the CPEI Faculty and assists in the review of the registrar.
3. The Chief Financial Officer reviews the accountant/bookkeeper and the registrar.
4. Annual Evaluation: [Annual Staff Self-Evaluation](#).

C. CPEI Faculty: All will complete an annual self-performance review in October.

1. Submit an annual Disclosure form for Conflict of Interest/Dual Relationships
2. Faculty members will complete the [Faculty Annual Self-Performance Review](#)

D. CPEI Faculty Performance Review: In October-November, the Chief Academic Officer (CAO) will complete an annual performance review for each active faculty member.

504.2 Maintaining Records: Copies of personnel annual reviews will be maintained in the personal files of faculty members in Populi.

Policy 505: Administrative Support for CPEI Faculty

Purpose: A process to ensure that adequate administrative support is available for CPEI Faculty

Responsible: CPEI Staff

Date Developed: April 2020

Date Reviewed: 10012021; 01202023; 10082024

505.1 Support Provided

The CPEI Staff, i.e., Chief Academic Officer, Director Technology and Registrar are available to ensure support to the CPEI Faculty prior to, during, and after learning activities.

A. Types of Support

1. Current student and faculty handbooks
2. Didactic teaching resources.
3. Feedback from end-of-course assessments.
4. Ethics consultation.
5. Library resources.

B. Professional Liability Insurance coverage is provided.

Policy 506: CPEI Leadership Succession Plan

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

Responsible: CPEI Board of Directors

Date Developed: April 2020

Date Reviewed: 11042021; 01202023; 06062023; 10082024; 11092025

506.1 CPEI Executive Officer (CEO) Vacancy

- A. The resignation, retirement, or removal of the Chief Executive Officer (CEO) will follow the following process.
 - 1. Resignation/Retirement: Unless circumstances prevent it, the CEO will submit a letter of resignation to the Board of Directors at least three months before departure.
 - 2. Removal: The CEO may be removed based on one more of the following actions approved by the Board of Directors.
 - a. Ethical behavior is inconsistent with the position, including, but not limited to, the misappropriation of funds, misrepresentation of CPEI to the community, etc.
 - b. Ineffective leadership. Failure to effectively lead the organization forward in reaching its strategic goals.
 - 3. A severance package would be determined by the Personnel Committee and recommended to the Board of Directors for approval. The severance package should consider the number of years the CEO was employed.
- B. Actions upon the Chief Executive Director's departure.
 - 1. Board of Directors will appoint the interim CEO.
 - 2. Chair of Personnel Committee: The Personnel Committee will review the CEO's job description and responsibilities to determine if any changes need to be made and appoint the Chief Executive Officer's Search Committee.
- C. The Search Committee will consist of seven (7) members (a mix of chaplains, CPEI Faculty, executive council, etc.) with the Vice-Chair of the Board of Directors as Chair.
 - 1. 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 needs to know for decision-making reasons.
 - 2. Once the Search Committee has a candidate to recommend for the Chief Executive Officer position, the Chair of the Board of Directors will call for a special meeting where the name of the candidate will be presented

and discussed. Upon consensus of CPEI's BODs, the final candidate will be approved or rejected. The Board of Directors will make the final decision. Once the decision has been made, the candidate will be notified and given three days to either accept or reject the offer.

3. Upon acceptance, the Interim Chief Executive Officer will notify the CPEI Membership of the newly elected Chief Executive Officer.
4. If the candidate does not accept, then the search committee resumes a search. Once the new CEO begins, the Interim CEO responsibilities will end.
5. Chair of Board of Directors Vacancy: The following process will be followed.
 - a. The Chief Executive Officer (CEO) 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 CEO will notify the Board of Directors immediately after notifying the Vice Chair.
 - b. The newly appointed Board Vice Chair will serve as the Interim Chair of the Personnel Committee. The Personnel Committee will recommend a replacement for the position of Vice-Chair to the Executive Council for approval or rejection.
 - c. Upon approval, the CEO or Board Chair will notify the CPEI Membership of the newly elected Vice Chair.
 - d. The Board Chair and Vice Chair will serve the remainder of the terms being vacated.
6. Vice-Chair of the Board of Directors Vacancy: The following process will be followed.
 - a. The CEO will notify the Board Chair of the vacancy.
 - b. The Board Chair will serve as the Interim Chair of the Personnel Committee. The Personnel Committee will recommend a replacement for the position of Vice Chair to the Executive Council for approval or rejection.
 - c. Upon approval, the CEO or Board Chair will notify the CPEI Membership of the newly elected Vice Chair.
 - d. The Board Chair and Vice Chair will serve the remainder of the terms being vacated.
7. The Succession Plan will be reviewed by the Ethics Chair as part of the annual Policies and Processes Review.

Policy 507: 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; 10082024; 12032025

507.1 Action Steps:

- A. **Responsibility:** The CPEI Staff is responsible for reviewing, revising, and implementing this plan is the responsibility of CPEI's staff.
- B. **Budget:** The administration will work closely with the Chief Financial Officer (CFO) to ensure adequate resources are projected for upcoming requirements or needs.
 - a. Office space
 - b. Office equipment
 - c. Office supplies (promotional items)
- C. **Facility inspections:** persons completing the annual compliance report will review the following items as needed: fire alarms, sprinkler systems, etc.
- D. **Property Insurance:** Determine whether the property insurance is up-to-date and sufficiently covers the property.
- E. **Severe Weather:** Determine whether personnel are aware of the actions and requirements in the event of severe weather, fire, etc.

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 are active		
-Sprinkler systems		
-Exit lights working		
-Other		
Property Insurance		
-Current and Sufficient		
Property Taxes		
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		

Policy 600: Informing Continuing Education Participants of Course and IACET Requirements (former Process 221).

Purpose: To ensure continuing education participants are informed of the course requirements and meet the criteria for earning IACET CEUs.

Responsible: All continuing education faculty.

Date Developed: April 2020

Date Reviewed: 09302020; 10012021; 01202023; 10082024; 12282024; 11/17/2025

600.1 Action Steps:

- A. Continuing Education participants will be informed of the course requirements and IACET CEUs. This will be accomplished by the following:
 - 1. Brochures will communicate the course requirements.
 - 2. Introducing the requirement during the presentation itself.
- B. 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.

Policy 601: Planning and Executing Continuing Education Activities for Professional Development (former Process 221)

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

Responsible: IACET Coordinator for CPEI.

Date Developed: April 2020

Date Reviewed: 12162020; 10012021; 01202023; 10082024; 12052024; 01102026

601.1 Introduction:

CPEI is accredited by International Accreditation for Continuing Education Training (IACET) as a Continuing Education Unit (CEU) provider. IACET is an accrediting organization with historical roots in the continuing education unit's movement, setting standards and metrics for quality CEU education. IACET accreditation provides CPEI the ability to offer CEUs, an essential resource for many professionals, to members, affiliate organizations and organizations with missions that align with CPEI.

- IACET/CEUs are calculated at a ratio of 1 instructional hour = .1 CEU The formula for calculating CEU's is:
- Contact time (hours) = (total minutes for all activities) – (total minutes spent on non-allowable activities)
- Number of CEUs = 10 Contact time (hours) = 1.0 Continuing Education Unit (CEU)
- Example: you offer 3 hours of training which will equal (.3) Contact hours.

601.2 Action Steps:

- A. Continuing Educational Unit (CEU) events are specialized training, for a specified audience, typically with pastoral care or religious themes.
- B. CEU events are typically planned for a variety of audiences, including, but not limited to:
 1. Religious leaders (Pastors, Church Staff, Ecclesiastical Employees.)
 2. Chaplains
 3. Physicians
 4. Nurses
 5. Other healthcare workers
 6. Counselors/Marriage and Family Therapists
 7. Social Workers
- C. Continuing Education (CEU) Activity has 4 steps:
 2. Continuing Education (CEU) Activity Approval Application
 3. CEU Acknowledge and Approval form tracks the application process
 4. Program or Conference Evaluation Form
 5. Certificate of Completion
- D. Continuing Education (CEU) Activity Approval Application
 1. [CPEI -Continuing Education \(CEU\) Activity Approval Application](#)
 2. [External Organizations-Continuing Education \(CEU\) Activity Approval Application](#)

3. Please use the correct form, i.e., either CPEI or external organization. Forms provide a means for tracking activities.
4. A minimum of eight (8) weeks is recommended for submitting a CEU Activity Approval Application for an IACET CEU activity.
5. ACET Coordinator for CPEI or designee reviews CEU Activity Approval Applications.
6. The individual or organization logo and is responsible for providing the logo to IACET Coordinator for CPEI or designee.

E. Requirements for IACET Approved Application

1. The participants will receive a copy of the Learning Event Schedule (dates, location, speaker);
2. Participants will be made aware of the requirements to earn CEU credit;
3. Participants will be informed of CEUs being offered;
4. The requirements for receiving IACET CEUs are clearly communicated.
5. The participants will be required to submit to the sponsor of the training a copy of their registration with a driver's license or a government-issued photo for verification purposes;
6. Records are maintained by the sponsoring individual/organization to ensure the participants have met the required time for CEU credit;
7. Training event providers will disclose in program materials conflicts of interest and dual relationships;
8. The sponsoring organization or individual will ensure that all promotional activities describe fees, time, location, and the acknowledgment of any ethical concerns;
9. Room/learning space is prepared and ready for use;
10. Handout resources are prepared and ready for distribution;
11. Technology (computer, sound, etc.), is operating properly.

F. CEU Acknowledge and Approval form

1. The IACET Coordinator for CPEI or designee reviews and responds within two weeks of receiving the Continuing Education (CEU) Activity Approval Application.
 - a. **CPEI/CEU Acknowledge and Approval form**
 - b. **External Organization/CEU Acknowledge and Approval form**
2. The CEU Acknowledge and Approval form tracks and communicates the status of Continuing Education (CEU) Activity Approval Application

G. Program or Conference Evaluation Form

1. CPEI provides the individual or organization sponsoring approved CEU courses with a **Program or Conference Evaluation Form** using the following template:

2. Individuals or organizations sponsoring CEU events ensure the distribution of Program or Conference Evaluation Form to attendees. The program or conference evaluation form will contain:
 - a. CPEI and IACET Logo and/or Institutional Logo
 - b. Participant's Name
 - c. Name of the Event
 - d. Date of the Activity
 - e. IACET CEU Credits Awarded
 - f. Date of Event
 - g. Signature of Presenter or Institutional Representative
 - h. Recognition of CPEI as an Accredited IACET Provider

Policy 700: Credentialing Appeals

Policy: A policy outlining the credentialing appeals process.

Purpose: To outline CPEI's Credentialing Process for filing a credentialing appeal.

Scope: This policy applies to candidates seeking credentialing with CPEI.

Date Developed: 12/16/2025

Date Reviewed:

In addition to the following guidance, credentialing applicants are encouraged to review the Credentialing Manual for additional details.

700.1 Guiding Principles for Filing a Credentialing Process Appeal

- A. Credentialing Candidates may file an appeal when:
 - 1. The candidate believes the review process was not followed, or
 - 2. The candidate disagrees with the credentialing process's outcome.
- B. Candidates will utilize the form below to file an appeal; however, the candidates will refrain from:
 - 1. Contacting members of the review board following the initial decision.
 - 2. Contacting individuals in or outside of CPEI to garner support or criticize the credentialing process.

700.2 Submission of a Credentialing Appeal

- A. An appeal must be submitted in writing within 10 days of the credentialing review process. [CPEI Credentialing Appeals Form.](#)
- B. The appeal must identify:
 - 1. Candidate's name.
 - 2. The credential that one is seeking.
 - 3. Briefly describe the review process in question.
 - 4. Identify specific procedures in question.

700.3 Process for Handling Credentialing Appeals

- A. The Credentialing committee will review the appeal within 14 days of submission.
- B. If the Credentialing committee finds the review board did not follow the required process, the credentialing committee will appoint a new reviewer to coordinate a second review board.

Appendix

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.

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.

Affiliate Organizations: consist of legal organizations that are guided by a CPEI Faculty and sign a Memorandum of Understanding with CPEI, which outlines the responsibilities of each party (CPEI and the Affiliate Organization).

CPEI Advisory Council is comprised of volunteer stakeholders 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 educational programs and the perception of students' growth and development. Depending 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 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 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 that 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 CPEI Faculty 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 60 minutes.

CPE Course is used to describe the time students and CPEI Faculty 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 CPE courses.

CPE CPEI Faculty is an individual who has met all the requirements to supervise ongoing groups of CPE students.

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

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 CPEI Faculty 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 to develop the competencies required to be certified as CPE CPEI Faculty.

Synchronous refers to services that involve the interaction between the CPEI Faculty, the CPEI Faculty, 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.