



**Dora**  
Department of Regulatory Agencies

**Continuing Professional  
Development Portfolio**

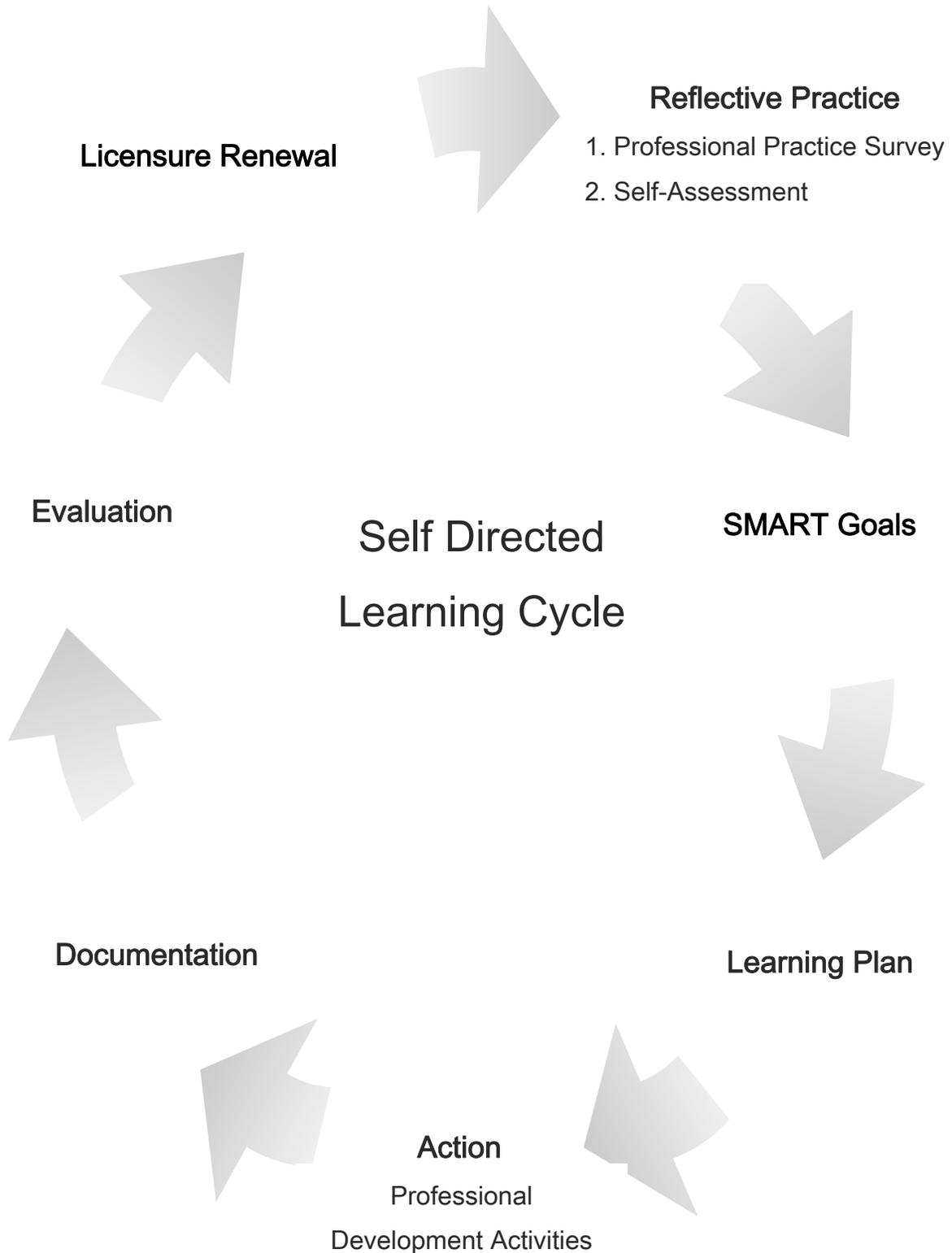
**Licensed Professional Counselors**

**Division of Registrations**

**DRAFT 9.01.10**



# CONTINUING PROFESSIONAL DEVELOPMENT STEP



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# OVERVIEW OF CONTINUING PROFESSIONAL DEVELOPMENT

## What is Continuing Professional Development?

Continuing Professional Development is the ongoing ability of a licensee to learn, integrate and apply the knowledge, skill, and judgment to practice as a Licensed Professional Counselor according to generally accepted industry standards and professional ethical standards in a designated role and setting. The ongoing acquisition and application of knowledge, decision-making, and interpersonal skills contributes to the health and welfare of clients served. This approach to Continuing Professional Development uses Reflective Practice, Learning Plans, and Professional Development Activities to fulfill its objective.

## Why is Continuing Professional Development important to the Board?

The Board is responsible for protection of the public through the regulation of safe, effective care. In order to become licensed, all Professional Counselors have demonstrated initial competence by successfully meeting the minimum requirements set forth by the Board. Because the field of Professional Counseling changes rapidly, initial knowledge and competence can quickly become obsolete. As a result, safe practice is dependent upon the Continuing Professional Development of Licensed Professional Counselors (LPC). That is why during the 2009 Legislative Session, House Bill 09-1086 was passed which requires LPCs participate in CPD in order to renew a license.

## What is meant by “Reflective Practice”?

Reflective Practice involves evaluating your professional skill and aspirations to identify new learning opportunities. Reflective Practice assists the professional in progressing and strengthening their skill to accomplish the learning goals they have set out for themselves. It is not a new concept; it is simply an approach for learning from experience and incorporating that knowledge into your practice. The Continuing Professional Development program is founded upon Reflective Practice. Continuing Professional Development is a Self-Directed Learning Cycle that involves:

- Reflecting to identify learning opportunities based on your practice
- Setting goals based upon your reflection
- Planning activities to develop a learning plan that address those opportunities
- Implementing that learning plan
- Documenting
- Evaluating the learning experience

Continuing Professional Development encompasses all of the learning we do that allows us to develop professionally. CPD recognizes that learning not only occurs by traditional methods, such as attending a course or a workshop, but that it also occurs in the workplace and our daily lives. It takes into consideration that we all like to learn in different ways. Completing learning activities is only part of the process; the ability to reflect on these experiences and incorporate the new knowledge into your practice is what makes the learning meaningful. This Professional Development Portfolio incorporates the five steps of the Self Directed Learning Cycle to ensure that learning experiences are meaningful to help you develop as a practitioner.

## How many hours are required?

You must complete 40 Professional Development Hours (PDH) each renewal cycle. One PDH is defined as one hour of active learning. You may choose any Professional Development Activity (PDA) you would like from the chart on page XX. As you will see, CPD is much more than traditional Continuing Education. Learning occurs in all sorts of settings. That's why PDH can be accrued for activities such as Mentoring and Independent Learning.

*The Colorado Division of Registrations thanks the Ontario College of Pharmacists, the National Board for Certification in Occupational Therapy, the North Carolina Board of Nursing, and The College of Nurses of Ontario for their assistance in the development of the Reflective Practice Principle and related documents.*

## Step 1: Reflective Practice

The first step in CPD requires reflecting upon your practice to identify learning opportunities. The Board has developed two tools to assist you in Reflective Practice. These tools are completely confidential.

Begin with the *Professional Practice Survey ("Survey")* which is available online. The Survey will help identify any knowledge areas that you may want to address. The Board has identified 4 competency dimensions that are common to all LPC practice settings. These 4 dimensions are:

- Collaboration and Communication
- Job Knowledge and Practice Application
- Leadership
- Legal, Ethical, and Professional Standards

After taking the Survey, complete the *Self-Assessment* worksheet on page XX. The *Self-Assessment* will assist you by guiding you through a professional inventory targeted at identifying the successes and challenges unique to your practice.

## Step 2: SMART Goals

Once you have identified your learning interests, it is important to set learning goals that follow the SMART principle: **Specific, Measurable, Achievable, Relevant, and Timed**. The "SMART Goals" worksheet on page XX provides further guidance on formulating goals.

## Step 3: Learning Plan

In Step 3 you will develop a Learning Plan to help you achieve each goal. The Learning Plan should be completed online on CPD Portal. A sample is provided on page XX. Review the *Professional Development Activity Chart (PDA Chart)* on pages 10 – 13, and then document your selections on the *Learning Plan*. Consider a target date to complete each of your activities. Setting a date will also help to ensure your success.

## Step 4: Action

Implement your plan! Be flexible enough to make modifications to your plan as you go; you may want to include a Professional Development Activity (PDA) that wasn't part of your original strategy. As long as that activity helps you to achieve your goal, it will be a valuable modification in your professional development. The last day to change your plan is MONTH, DAY.

## Step 5: Documentation

Documentation is an important part of the learning process as it enables you to track your progress. Document your PDH according to their indicated requirements in the *PDA Guidelines* section of this portfolio. Should you be selected for an audit, you will be asked to provide this documentation.

## Step 6: Evaluation

Evaluate your learning accomplishments as they relate to the goals you set forth. Identify the outcomes of your learning activities and determine how your learning will impact your practice. Use the *Self-Evaluation* on page XX of this portfolio. Let those outcomes guide the future steps that need to take place as you continue your professional development.

You select the resources and activities that best support your learning style, interest and objectives!

THE CPD Portal:

Your go-to site for Professional Development.

# CPD IS ALL ABOUT YOU!

**CPD is an individualized program. You are the best judge of your interests and career goals. CPD is a model created to help you reflect upon your practice, identify areas of growth that interest you, and document your work towards that goal. Because the Board wants to ensure this program is for you, they have taken certain steps to safeguard your privacy:**

1. The Professional Practice Survey, Self-Assessment, SMART Goals and Self-Evaluation results are completely confidential. They are in no way no way linked to your name, license number or any other personal information.
2. The content of your learning is for you to decide. The Board will not assign, audit or evaluate the content of your professional development activities. Why not? Because CPD is all about you. You are the best judge of your practice, your interests and your career goals. CPD is a tool to help you pursue them.

**That's good news for you. Here's why:**

**Choose the activities that help you learn best.** You don't have to sit in a classroom if you don't want to! With options such as independent learning or mentoring, you can select the learning method that's the best fit for you and your practice.

**Live by your schedule (and no one else's).** Because CPD goes beyond Continuing Education, you can choose activities and times that fit your timeframe. No need to re-shuffle your appointments just to fulfill your CPD. You decide the when, what, where and how of CPD!

**Plan for the unforeseen.** Didn't know your favorite professor was delivering a lecture this Tuesday? Did you get stranded in Seattle and now you'll miss your presentation? Does the topic of your independent study just not interest you anymore? Unforeseen circumstances are no problem in CPD. You should feel free to change your plan if something comes up!

**Assess in confidence.** With no way to connect your Survey or Self-Assessment results to your personal information, you can reflect honestly about your career and goals.

# PROFESSIONAL DEVELOPMENT HOURS

Licensees are required to accrue at least 40 hours of Professional Development during their 2-year renewal cycle. You will be asked to list the activities and Professional Development Hours (PDH) completed on your Learning Plan accessed through the CPD Portal. Detailed instructions can be found on the login page at [www.CPDportal.com](http://www.CPDportal.com).

The 40 hours should be accrued in activities that (A) support your knowledge and skills, and (B) work for your practice area and role. No more than 20 hours may be accrued in a single activity category during the renewal cycle. The 6 categories are: Volunteer, Mentor/Supervision, Presenting, Coursework, Independent Learning, and Group Learning. Examples of PDH activity combinations are provided on the following page. Please refer to the Professional Development Activity Chart (PDA Chart) on pages 10 - 13 for a comprehensive listing of accepted activities.

Professional Development Hours are equivalent to clock hours. PDH may only be calculated for time spent engaged in a learning activity. Time spent commuting, traveling, scheduling or planning your activities does *not* count towards the 40 PDH required for each renewal cycle. Time spent in a workshop, researching a topic for publication, and reading a journal are examples of activities that *are* acceptable. One clock hour of Continuing Education is equal to one PDH.

## Accruing Professional Development Hours

- Licensee should accrue at least 40 PDH during their 2-year renewal cycle. Accepted PDH activities are listed in the chart on pages 10 – 13.
- No more than 20 PDH may be accrued in a single activity category during a 2-year renewal cycle.
- A maximum of XX (XX) hours may be carried from the last renewal cycle to the next cycle, if the hours were earned in the six months of the renewal cycle and are in excess of required XX (XX) hours.
  - Example: A licensee accrues X (X) hours within the 2-year renewal cycle – an excess of X (X) hours. X (X) of the excess hours were accrued during the last six months of the cycles (the other XX were accrued earlier in the cycle. The X hours earned in the last six months can be carried into the next renewal cycle.
- The Board and DORA do not accredit continuing education courses or other Professional Development Activities.
- Documentation (e.g. certificates) of the XX PDH should not be sent to DORA unless specifically requested to do so. If a license has been lapsed for more than one (1) year from the scheduled renewal date, or a licensee is selected for an audit, verification documentation is required.
- Professional Development Activities should develop your professional skill, must be directly relevant to your competence as a Professional Counselor and should contribute to achieving your SMART Goal. It is the Professional's responsibility to demonstrate how the particular activity accomplishes the above. Professional Development Hours cannot be accrued for activities that fulfill duties for your primary role or job description.
- PDH requirements apply to all licensees – regardless of current employment status, license status, or credential.

*\* For a full list of the CPD program rules, please visit the Department of Regulatory Agencies' (DORA) website at [www.dora.state.co.us/mental\\_health](http://www.dora.state.co.us/mental_health).*

# PROFESSIONAL DEVELOPMENT ACTIVITIES CHART

ID	Activity	Summary
<b>1</b>	<b>Volunteer Service</b>	
	The Volunteer Activity includes service provided at no charge that relies on your professional skill and advances the Professional Counseling profession. To accrue PDH, volunteer service must occur within a 501(C)3 or non-profit agency (Page 22).	Letter from agency detailing name, hours and service provided.
<b>2</b>	<b>Mentor/Supervision</b>	
	A mentorship is an ongoing relationship between a mentor and a protégé. PDH may be accrued for participation in a mentorship as a mentor or as the protégé (Page 23).	Letter from the mentoring counterpart.
<b>3</b>	<b>Presenting</b>	
	Presenting entails the preparation and delivery of material related to one's professional skill or experience (Page 28).	Copy of presentation or copy of program listing. Must include presenter name, times and title.
<b>4</b>	<b>Coursework</b>	
	Coursework activities are those undertaken in traditional learning environments (Page 34).	Copy of agenda, syllabus, program, certificate of completion or letter from the provider.
<b>5</b>	<b>Independent Learning</b>	
	Independent Learning is any structured learning experiences undertaken by an individual that takes place outside of traditional learning environments (Page 36).	Independent/Group Learning Form
<b>6</b>	<b>Group Learning</b>	
	A study group is a small group of professionals that regularly meet to discuss shared areas or fields of learning. Study Groups whose members seek to accrue PDH should choose topics that advance professional skill and experience. (Page 38)	Independent/Group Learning Form and Attendance Sheets

*\* Professional Development Activities should develop your professional skill, must be directly relevant to your competence as a Professional Counselor and should contribute to achieving your SMART Goal. It is the Professional's responsibility to demonstrate how the particular activity accomplishes the above. Professional Development Hours cannot be accrued for activities that fulfill duties for your primary role or job description. Please see the PDA Guidelines on the following pages for specific requirements.*

# EXAMPLES OF PDH

Carol is a LPC and works in direct client care in an assisted living facility to meet certification renewal requirements. Carol completes the following PDH.

- Completes a 2 hour course on therapeutic approaches for dementia patients **2 PDH**
  - Completes a 1 hour online course on challenges and resources for families and caregivers of individuals with dementia **1 PDH**
  - Attends a one-day course on treatment techniques for older adults with vision loss **8 PDH**
  - Provides 8 weeks of supervision to a LPC working towards his LPC for 3 hours/week **18 PDH**
  - Publishes an article on tips for preventing caregiver burnout in a community newsletter which required 9 hours to research and write **11 PDH**
- Total: 40 PDH**

Mary is an LPC employed as case manager in an adult community mental health facility. In order to meet certification renewal requirements, Mary completes the following PDH:

- Attends a 1-day course on mental health interventions **8 PDH**
  - Publishes an article in a non-peer reviewed counseling publication on evidence-based practices for treatment of cognitive disorders requiring 12 hours to research and write **12 PDH**
  - Provides 1 week of supervision for a student intern requiring 20 hours **20 PDH**
- Total: 40 PDH**

Alex is an LPC tenure-track assistant professor teaching in a master's level counseling program. In order to meet certification renewal requirements, Alex completes the following PDH.

- Publishes a peer-reviewed journal on the role of a counselor in transition services requiring 8 hours to research and write. **8 PDH**
  - Mentors a junior licensed mental health professional faculty member for a total of 14 hours **14 PDH**
  - Develops a multimedia instructional program for new educators requiring 14 hours to research and write. **14 PDH**
  - Attends a 4-hour presentation on school-based interventions at a professional conference **4 PDH**
- Total: 40 PDH**

Gloria is a LPC practitioner. Her primary practice role is an administrator of a substance abuse recovery facility. In order to meet licensure renewal requirements, Gloria completes the following PDH:

- Completes a 2-credit hour university course on management communications **20 PDH**
  - Completes 7-hour s of independent learning on functional interventions for substance abusers **7 PDH**
  - Presents a 3 hour in-service training on low-tech assistive devices requiring 3 hours of preparation. **6 PDH**
  - Guest lectures for 3 hours to a class of addiction counselor students on ethics requiring 4 hour of preparation **7 PDH**
- Total: 40 PDH**

Julia is an LPC and currently a stay-at-home mom. She plans to return to the workforce as a life skills consultant in a correctional facility. In order to meet reinstatement requirements, Julia completes the following PDH:

- Completes 3 WebEd courses on topics related to her role life skills consultant **3 PDH**
  - Takes a 2-hour short counseling skills class for young offenders **2 PDH**
  - Reads 30 peer-reviewed articles and writes a report describing the effectiveness of cognitive-behavioral treatment techniques and on the development of life skills requiring 15 hours to complete **15 PDH**
  - Receives 20 hours of mentoring from an LPC working in a youth-offender unit **20 PDH**
- Total: 40 PDH**

# PDA GUIDELINES

Specific guidelines for the 8 Professional Development Activities are described below. When selecting which PDA(s) you will use, please ensure you retain the proper documentation as is specified in that PDA Guideline.

Professional Development Activities should develop your professional skill, must be directly relevant to your competence as a Professional Counselor and should contribute to achieving your SMART Goal. It is the Professional's responsibility to demonstrate how the particular activity accomplishes the above. Professional Development Hours cannot be accrued for activities that fulfill duties for your primary role or job description.

## **VOLUNTEER SERVICE**

PDH can be accrued hour for hour spent in Volunteer Service. The Volunteer Activity includes service provided at no charge and must occur within a 501(C)3 or non-profit agency. A maximum of 20 PDH in the Volunteer Activity is permitted per 2-year renewal cycle.

Volunteers accruing PDH should also retain a letter from the 501(C)3 or non-profit agency for which they volunteered. This letter should be completed on the organization's letterhead and detail the hours, date (or date range) and type of service provided. A letter is required from every agency for which you served as a Volunteer and wish to accrue PDH. If you are selected for an audit, you will be asked to provide the above letter from the volunteer organization.

Some examples of Volunteer Activity may include but are not limited to:

- Working in a hospice to get exposure a new client population
- Responding to a crisis situation at a School, Church , or as a result of a natural disaster
- Serving on a non-profit Board of Directors

Please Note – Examples of Volunteer Activities that will **NOT** be accepted for PDH accrual include:

- Serving on a board of school governors
- Cub Scout or Brownie Pack Leader
- Coaching an examination candidate
- Making crafts for fund raising ventures

Professional Development Activities should develop your professional skill, must be directly relevant to your competence as a Professional Counselor and should contribute to achieving your SMART Goal. It is the Professional's responsibility to demonstrate how the particular activity accomplishes the above. Professional Development Hours cannot be accrued for activities that fulfill duties for your primary role or job description.

## **MENTORING/SUPERVISION**

Mentoring is an ongoing educational relationship between a mentor and protégé. You may accrue PDH for participating as either the mentor or protégé. A total of 20 PDH may be accrued for Mentoring during each 2-year renewal cycle.

Mentors or protégés accruing PDH should also retain a letter from their mentor counterpart. This letter should be signed by the mentor counterpart on formal letterhead (if applicable) and detail the hours, date (or date range) and type of service provided. A letter is required from every mentoring relationship for which you wish to accrue PDH.

For example, if you serve as a Mentor, you should request a letter of confirmation from your protégé. If you are selected for an audit, this documentation will be requested.

Professional Development Activities should develop your professional skill, must be directly relevant to your competence as a Professional Counselor and should contribute to achieving your SMART Goal. It is the Professional's responsibility to demonstrate how the particular activity accomplishes the above. Professional Development Hours cannot be accrued for activities that fulfill duties for your primary role or job description.

## **PRESENTING**

PDH can be accrued for preparing and delivering presentations related to one's professional skills or experiences. PDH may be accrued for both delivery and preparation. PDH can only be accrued once for a presentation. If a presentation is given multiple times, the Professional should only count the first delivery of the presentation as PDH. A maximum of 20 PDH for Presenting is permitted per 2-year renewal cycle.

PDH may be accrued for serving as the Primary or Co-Presenter so long as this is not the Licensee's primary role and job responsibility. Presentations must be related to practice area, professional knowledge, skill and experience. Types of Presentations include but are not limited to:

- State, National or International workshops, seminars or conferences
- In-Service training or instruction
- Guest lecturing

When serving as a Presenter to accrue PDH, please reserve either a copy of the presentation delivered or a copy of the program listing. The presenter name, times and title must be indicated on the copy of the presentation or program listing. Should you be selected for an audit, this documentation will be requested.

Professional Development Activities should develop your professional skill, must be directly relevant to your competence as a Professional Counselor and should contribute to achieving your SMART Goal. It is the Professional's responsibility to demonstrate how the particular activity accomplishes the above. Professional Development Hours cannot be accrued for activities that fulfill duties for your primary role or job description.

## **COURSEWORK**

PDH may be accrued for many types of coursework including academic courses, continuing education, online coursework, seminars, conferences, in-service training, and workshops. Coursework should expand or refine your professional skill and experience. A total of 20 PDH may be accrued for Coursework during each 2-year renewal cycle.

When completing coursework for PDH accrual, please also retain one of the following forms of documentation: agenda, program, syllabus, certificate of completion, letter from provider on letterhead. Whichever form of documentation you choose from the list above, it must detail the course name, content, speaker, hours of attendance and date. In the event of an audit, this documentation will be requested for verification.

Professional Development Activities should develop your professional skill, must be directly relevant to your competence as a Professional Counselor and should contribute to achieving your SMART Goal. It is the Professional's responsibility to demonstrate how the particular activity accomplishes the above. Professional Development Hours cannot be accrued for activities that fulfill duties for your primary role or job description.

## **INDEPENDENT LEARNING**

Independent Learning can take many forms which can be used to accrue PDH. One hour spent in active learning (reading, studying, etc) is equivalent to one PDH. A total of 20 PDH may be accrued in Independent Learning activities during each 2-year renewal cycle.

Independent Learning includes professional development strategies such as:

- Receiving case consultation
- Attending informational interviews
- Participating in online courses
- Reading journals, text books, CE articles and professionally relevant literature
- Conducting a self-study series
- Curricula development
- Research design and implementation\*
- Information gathering and drafting for the purpose of publication

*\*You may not accrue PDH for research projects that are a part of your primary role. If you work in Research, please choose a different independent learning strategy.*

Because it is difficult to provide supporting documentation for Independent Learning, please complete the Independent/Group Learning Form on page XX. This Form serves as your documentation of the activity. Should you be selected for an audit, the completed *Independent/Group Learning Form* will be requested. This Form serves as your documentation of the Professional Development Activity.

Professional Development Activities should develop your professional skill, must be directly relevant to your competence as a Professional Counselor and should contribute to achieving your SMART Goal. It is the Professional's responsibility to demonstrate how the particular activity accomplishes the above. Professional Development Hours cannot be accrued for activities that fulfill duties for your primary role or job description.

## **GROUP LEARNING**

PDH may be accrued for participation in a Study Group. Study Groups should choose topics that advance professional skill and experience. A total of 20 PDH may be accrued per 2-year renewal cycle in the Group Learning Activity.

Study Groups should keep an attendance sheet for each meeting. A copy of this attendance record should be distributed to each group member for their records. In addition, Study Group participants should complete each section of the *Independent/Group Learning Form* on page XX. Each group member should complete their own form. The electronic *Independent/Group Learning Form* is available at [www.CPDportal.com](http://www.CPDportal.com). Should you be selected for an audit, you will be requested to submit your completed *Independent/Group Learning Form* as well as the attendance sheet for all study group meetings. This Form serves as your documentation of the Professional Development Activity.

Because it is difficult to provide supporting documentation for Group Learning, please complete the Independent/Group Learning Form on page XX. This Form serves as your documentation of the activity. Should you be selected for an audit, the completed *Independent/Group Learning Form* will be requested.

Professional Development Activities should develop your professional skill, must be directly relevant to your competence as a Professional Counselor and should contribute to achieving your SMART Goal. It is the Professional's responsibility to demonstrate how the particular activity accomplishes the above. Professional Development Hours cannot be accrued for activities that fulfill duties for your primary role or job description.

**INDEPENDENT/GROUP LEARNING FORM DEFINITIONS:**

**Date:** Provide the date or date range of your independent study.

**Resources:** Enter the reference for the resource(s) you used. This may include an article reference, the personal and/or practice name of a consultant, or the course title and provider of an online study series.

**Type and Content of Activity:** List whether you participating in consulting, research, reading, informational interviews, online courses, etc. Use bullet points of content covered or provide a brief summary.

**EXAMPLE:**

<b>Date</b>	<b>Resources</b>	<b>Topic Area</b>	<b>Type and Content of Activity</b>
10/30/2010	Mann, W.C., Belchior, P., Tomita, M.R. & Kemp, B.J. (2005). <i>Barriers to the Use of Traditional Telephones by Older Adults with Chronic Health Conditions. Participation and Health.</i> 25(4) 160 - 166.	<i>Technology and Senior Populations with Chronic Health Conditions</i>	<i>Article describes a research study that investigated reasons why older adults with chronic health conditions fail to use telephone special features to assist with their communication. A survey was used with a large sample of older adults living in communities across the country. Descriptive statistics was used to report sample characteristics. Results indicated several barriers and authors suggest the following areas where social workers could assist including: telephone placement and wiring; furniture placement; provision of information about cost and telephone features that address specific impairments; issues concerning background noise; telephone maintenance; nuisance calls; and special services.</i>

# QUICK FAQs

## Why is Continuing Professional Development being required?

In 2009 the Colorado State Legislature passed HB09-1086 entitled "Concerning Continuing Professional Competency of Certain Mental Health Professionals". This bill was introduced by four mental health professions (Addiction Counselors, Licensed Marriage & Family Therapists, Licensed Marriage and Family Therapists and Licensed Clinical Social Workers) and supported by DORA (DORA supports continuing professional development as a whole). Prior to the introduction of the bill, the mental health professional associations met to discuss support for this bill.

## Who is required to participate?

Addiction Counselors Levels II, III and LAC  
Marriage and Family Therapists  
Professional Counselors  
Social Workers and Clinical Social Workers

.....  
**Continuing Professional Competence *is* Professional Development. Many of the activities you are already doing on a day-to-day basis will count as credit.**  
.....

## When does the Continuing Professional Development program go into effect?

The Colorado Legislature mandated that the Continuing Professional Development program begin on January 1, 2011. This means participation will be required for the renewal cycle ending on August 31, 2011. Because the program starts during the end of the current renewal cycle, the Board will allow licensees to complete the program requirements in two parts. The Self Assessment, Practice Survey and drafting of the Learning Plan (Steps 1 – 2) must be completed before August 31, 2011. The implementation of the Learning Plan and all Professional Development Activities as well as their required documentation must be completed during September 1, 2011 to August 31, 2013. During a normal renewal cycle, Steps 1 - 5 would all be completed during the term of the cycle. For example, licensees will be required to complete Steps 1 – 5 during the renewal cycle that runs from September 1, 2013 to August 31, 2015.

## How often do I need to participate in the Continuing Professional Development program?

You will need to attest upon each renewal that you have complied with the Continuing Professional Development program requirements. The Continuing Professional Development cycle coincides with the existing license cycle. You have the full time frame between two renewal cycles to complete your Professional Practice Survey, Self Assessment, Learning Plan, Professional Development Activities, and any required Documentation. Typically the two-year time frame begins and ends on odd numbered years.

## How do I know that the Board won't evaluate me based on how I rate myself on the Professional Practice Survey and Self Assessment tools?

The purpose of the Continuing Professional Development program is consumer protection achieved by promoting high standards and quality assurance with respect to the Professional Counseling profession. The intent of the program is one of enrichment rather remediation. The Board's objective is not to police the profession to discover the "bad apples." The program is based upon the assumption that both internal factors (interest, job promotions, etc.) and external factors (new technology, law, etc.) offer the opportunity to further develop knowledge and skill. While the Colorado Legislature has mandated these mental health professional participate in Continuing Professional Competency, the specific information provided on the Professional Practice Survey, Self Assessment, SMART Goals, Learning Plan and Documentation are your responsibility and privilege. You are the best judge of your learning goals and achievement.

## **Is the information I submit through the Continuing Professional Development program confidential?**

Generally yes, but there are possible exceptions which are described below.

You will be required to submit an attestation verifying that you have complied with the Continuing Professional Development program requirements. The results of your Professional Practice Survey, Self Assessment, SMART Goals, and Self-Evaluation are totally confidential and should not be disclosed to anyone. You may be selected for a random audit in which case the Board will request to see your Learning Plan and Documentation. This information is also confidential and will only be shared with the Board and Board Staff.

Licensed Marriage and Family Therapists should be aware however there may be circumstances where information regarding your failure to participate in the program and any subsequent disciplinary action may be reported to the public or other inquiring parties.

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### **DO NOT SEND YOUR PROFESSIONAL PRACTICE SURVEY, SELF ASSESSMENT, SMART GOALS, OR SELF-EVALUATION TO THE BOARD.**

These tools are provided to help you develop a meaningful Learning Plan. They both should be anonymous and private. Do not share the details of these documents with the Board or DORA.

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## **Do I need to send Continuing Professional Development materials to the Board?**

No. However, you do need to retain your Continuing Professional Development program materials. You will be required to attest to the Board of your compliance with the program upon your license renewal. If you are selected for an audit, the Board will request you submit the appropriate Documentation. The Board is interested in your compliance with the program, not in evaluating the appropriateness of your learning to your practice. This is for you to decide. An audit of your CPD Documentation is targeted at assessing satisfactory completion of CPD requirements. Only the Learning Plan and CPD Documentation (Steps 3 and 5) are subject to an audit. All other steps such as the Survey, Self-Assessment, SMART Goals, and Self-Evaluation are completely confidential and do not need to be submitted to the Board.

## **Can I share my Continuing Professional Development materials with my employer?**

You may find it beneficial to use the CPD program as the basis of employee reviews and performance planning. You may choose to print, share or otherwise disclose this information at your will and discretion. Employers may not require you to disclose any CPD materials or make such disclosure a condition of employment. The statute specifically stipulates this confidentiality by stating that records of assessment or other documentation developed or submitted in connection with CPD are confidential and not subject to inspection by the Public. The Board and DORA maintain the confidential integrity of these records and documents in accordance with statute. For the full text refer to C.R.S. 12-43-506(2)(a).

## **Why should I complete the Self Assessment? I'm already competent.**

Learning is an ongoing process. By completing the Professional Practice Survey and Self Assessment you will be able to assess your strengths and identify the areas that you can enhance. This will enable you to develop a Learning Plan based on your personal learning needs. By developing your own Learning Plan, you have a greater chance of attaining the goals you have set for yourself.

## **How soon do I need to start my Learning Plan?**

The Board recommends you draft your Learning Plan immediately after taking the Survey and Self Assessment. The reason for this is that you are probably already focused on professional development and actively thinking about your

interests. Planning early is important to help you accomplish your goals. By starting early, you will also assure there is ample time to change your plan if something comes up.

### **How late can I change my Learning Plan?**

The last day to change your Learning Plan is MONTH, DAY of the odd number year of the renewal cycle. That means, for this renewal cycle the last day to change your Learning Plan is MONTH, DAY YEAR.

### **I need to change my Learning Plan. What do I do?**

You can change your Learning Plan by logging into the CPD Portal, select "View My Learning Plan" and then "Edit my Learning Plan." Once you have made the necessary changes, save your revised Learning Plan.

### **How long should I keep my Documentation forms?**

It is recommended you keep your Documentation materials which may include certificates, programs, letters, presentations or copies for at least 6 years. Because audits are rolling, this documentation may be requested of you either before or after your renewal period. An audit of your participation in the Continuing Professional Development program occurring before your renewal date for which you are accruing credit will take into account the possibility that all professional development hours may not be completed at the time of the audit.

### **Can I take Continuing Education courses?**

Yes, Continuing Education coursework can be counted toward your Professional Development Hours. In fact, you can use several types of coursework to accrue PDH. This includes academic coursework, attending conferences, lectures, and seminars. For a full list of eligible coursework activities, please refer to the PDH Activities Chart on pages 10 – 13 of this Portfolio.

### **I have more than one role. Do I need to complete the Survey for each role I occupy?**

No. It is only necessary to complete one section of the Survey. If you occupy more than one role, you do not need to take all respective sections of the Survey. Choose one of your roles to focus on for this CPD cycle. The choice of which role you will assess is based upon your sole discretion. You may choose a role that you do not currently occupy but which you would like to develop and achieve for promotion or professional development reasons. For example:

*Sally works as a Professor as well as a Direct Service Provider at the clinic at the University. She does not need to take both the Educator and Direct Service Provider Surveys. Sally decides to assess herself on the Direct Service Provider role as this is the area that most interests her.*

### **I have more than one License/Certificate in the area of Mental Health in the State of Colorado. Do I need to complete the CPD requirements for both Licenses/Certificates?**

No. You only need to complete the CPD program once each renewal cycle in order to renew your Licenses/Certificates to practice Social Work, Professional Counseling, Marriage and Family Therapy or Addiction Counseling (Levels II, III and LAC). Some Mental Health professions are not yet subject to CPD requirements. These include Psychologists and State Grievance Board registrants. Regardless of the number of Mental Health Licenses you possess, you need only complete 40 PDH each renewal cycle. If you hold multiple licenses/certificates, chose the area you would like to focus on for that renewal cycle. For example:

*Lee is a Licensed Marriage and Family Therapist (MFT) as well as a Licensed Professional Counselor (LPC). After evaluating his professional development interests, he decides to focus on the Marriage and Family Therapy License this renewal cycle. Lee logs on to the CPD Portal using his MFT license number, completes the MFT Survey, and accrues 40 PDH in the area of Marriage and Family Therapy. He may now renewal both his MFT and LPC licenses.*

## What do I hand in to DORA?

Not all CPD materials need to be submitted to DORA. Many are confidential and for your private records. Use the list below to help navigate the program requirements:

1. **Professional Practice Survey:** Complete online at [www.CPDportal.com](http://www.CPDportal.com). Results are not associated with your personal information or license information. DORA will track only your completion of the Survey. Your individual results will not be saved. For this reason, you may desire to print a copy of the Survey to record your answers for your records. You will not be able to access them through the CPD Portal after you have completed the Survey. If you have not completed the Survey, you will not be able to renew your license or certificate.
2. **Self-Assessment:** Complete the Self-Assessment Worksheet provided for you in the CPD Portfolio. Do not send your Self-Assessment to DORA or the Board. Retain your results for your personal records. The Self-Assessment is *not* subject to an audit of CPD compliance.
3. **SMART Goals:** Complete the SMART Goals Worksheet provided for you in the CPD Portfolio. Do not send your SMART Goals Worksheet to DORA or the Board. Retain your results for your personal records. The SMART Goals Worksheet is *not* subject to an audit of CPD compliance.
4. **Learning Plan:** Complete the Learning Plan online at the CPD Portal. Your Learning Plan is subject to an audit to verify your participation in the CPD program. Completion of the Learning Plan is required in order to renew your license/certificate. If you have not completed your Learning Plan, you will not be able to renew your license or certificate.
5. **Documentation:** Retain the proper documentation of your PDAs according to the Guidelines found on page XX of the CPD Portfolio. It is suggested you complete the corresponding documentation after completing each PDA on your Learning Plan and save them in a file. Should you be selected for an audit, you will be notified at which point this documentation will be requested for submission to DORA.
6. **Evaluation:** Complete the Self-Evaluation Worksheet provided for you in the CPD Portfolio. Do not send your Self-Evaluation Worksheet to DORA or the Board. Retain your answer for your personal records. The Self-Evaluation Worksheet is *not* subject to an audit of CPD compliance.

CPD Step:	Submit to DORA?	Where can I find it?	Are results anonymous?	Subject to Audit?
Professional Practice Survey	Yes	Online CPD Portal	Yes	No
Self-Assessment	No	CPD Portfolio	Yes	No
SMART Goals	No	CPD Portfolio	Yes	No
Learning Plan	Yes	Online CPD Portal	No	Yes
Documentation	Yes (if selected for audit)	Retain according to Guidelines on page XX.	No	Yes
Self-Evaluation	No	CPD Portfolio	Yes	No

*By statute, all records of assessments or other documentation developed or submitted in connection with the CPD program are confidential and not subject to inspection by the public or discovery in connection with a civil action against a LPC.*



# CPD WORKBOOK



# CHECKLIST

- Professional Practice Survey
- Self-Assessment Worksheet (page XX)
- SMART Goals (page XX)
- Learning Plan (page XX)
- Documentation (page XX)
- Self-Evaluation (page XX)

## Step-by-Step

1. Login to the DORA CPD Portal at [www.CPDportal.com](http://www.CPDportal.com).
2. Go to [www.practicesurvey.com](http://www.practicesurvey.com) to take the Professional Practice Survey.
3. Complete the Self Assessment on page XX of this Portfolio or download a copy [www.CPDportal.com](http://www.CPDportal.com).
4. Compose your SMART Goals. This may be easiest when completed immediately after your Survey and Self-Assessment.
5. Complete your Learning Plan by selecting the PDAs you plan to accomplish by the next renewal cycle. Refer to the PDA Chart to help you choose which activity may be the best fit for your learning style and schedule.
6. When you have completed your planned activity, secure and retain any required Documentation. Check this off in the last column on the Learning Plan.
7. Evaluate your Professional Development Activities by completing the Self-Evaluation Form on page XX.

In the event of an audit, the Board will request your Learning Plan and documentation. The Professional Practice Survey is tracked for completion. Individual results are anonymous and are not retained. All other CPD materials are for your private records. You will *not* be asked to submit the Self-Assessment, SMART Goals, or Self-Evaluation.

Remember that you will need to complete 40 PDH before renewal.

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### Change of plans?

No problem! Just log back onto your profile on the CPD Portal to make any necessary adjustments: add an activity, delete one, or change the date! The information you enter onto your Learning Plan and Documentation automatically saves.

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## Self-Assessment

### Scope of Practice:

1. Describe the diversity of the population with whom you work:
2. What common therapeutic issues, population issues, or disorders do you encounter?
3. If you are engaged in non-direct client care activities, describe your work:
4. How does your work reflect the 5 roles of a Professional Counselor? Consider the significance and/or percentage of time you spend in each:

### Professional Strengths and Opportunities for Development:

5. Describe a work related situation from the past year in which you felt confident or competent:
6. What skills contributed to the success of this situation? (You may want to create a learning goal to further develop this skill/strength)
7. Describe a work-related situation from the past year that made you feel unsure or uncomfortable, or for which you were dissatisfied with the outcome:
8. What skills or roles would you like to develop?

### Professional Interaction:

9. What clinical providers do you interact with regularly?
10. Describe the interaction(s):



# SMART GOALS

A Professional Development Goal is a statement or question that describes what you want to learn. Your objective should follow the SMART Principle. Recording SMART Goals is not a requirement of the CPD program. It is a useful practice however, and may help you to achieve your professional objectives more quickly. Your professional development goals are always subject to your personal discretion.

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**Your Learning Goal may not be clinically based. You may discover that your learning needs are related to management, business, administrative or communication issues that are also an important part of your practice.**

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SMART Goals are **Specific, Measurable, Achievable, Relevant and Timed**. This doesn't mean they are unchanging! You may have established a SMART Goal at the beginning of the licensure cycle, but find your interest has changed and the objective is no longer "Relevant" to your practice. Or a family emergency may come up that means your goal is no longer "Timed" or "Achievable" during this cycle. Unforeseen circumstances, whether they are internally motivated or externally imposed, are a part of life. You should feel comfortable changing your goals as is appropriate for your circumstance both personally and professionally.

A common error is to formulate a Learning Goal that is too broad. When vague words or methods are used, the goal is left open-ended. For example, a broad Learning Goal may be "*Learn more about bullying.*" In this case, it is unclear what the learner means by the statement "*learn more.*" How will they know when they have reached their goal and what level must be achieved to "*learn more*"? This type of statement creates a vague Learning Goal that won't be easily assessed when the goal is achieved. If the Learning Goal is more focused, such as "*What are the primary differences in therapeutic approaches between boys and girls when addressing bullying and how can I apply them to my practice within 6 months?*" the learner will be able to determine when they have accomplished the goal by when they can successfully answer the question.

Vague Learning Statements	"SMART" Learning Statements
Learn more about bullying.	What are the primary differences in therapeutic approaches between boys and girls when addressing bullying and how can I apply them to my practice within 6 months?
Learn more about supervising and managing.	Identify 3 "best practice" approaches to managing licensed clinical social workers working in End of Life care settings within the next 12 months.
Develop a lecture for marriage and family therapists on a marital stressor of older couples.	Develop a 2 hour lecture for marriage and family therapists regarding the effects Parkinson's Disease has on couples and their primary care givers within the next 12 months.

## SMART Goals

Specific:	Measurable:	Achievable:	Relevant:	Timed:
Your Learning Goal should present a clear picture of what knowledge or skill is desired. Consider stating your goal in the form of a question; this will help you identify a clear objective.	You should be able to determine when you have met your learning objective. Ensure your goal is not too vague or you won't know when you have achieved it.	Be realistic – ensure that you are able to complete your goal taking time, cost and support into consideration. Consider breaking a lofty goal into smaller steps so that it is not so overwhelming.	Your Learning Goal should be relevant to your learning needs and the needs of your practice.	Set realistic deadlines to achieve your goal. Begin by setting start and end dates. Time management is critical so it is important to focus on the activities of higher priority that will have a greater impact on your practice.

Identify your SMART Goals for this renewal cycle. Remember that a learning activity is something that you *DO* (i.e. *attend a Bullying workshop*). A Learning Goal is something you hope to achieve as a result of completing the learning activity (i.e. *identify the top 5 tips to give elementary students dealing with a bully*).

**Goal 1:**

Learning Activity:

**Goal 2:**

Learning Activity:

**Goal 3:**

Learning Activity:

# Learning Plan Worksheet

Use the Learning Plan Worksheet to determine your CPD activities for this renewal cycle. The Learning Plan *must* be completed online at [www.cpdportal.com](http://www.cpdportal.com) in order to renew your license. The worksheet provided here is for your personal records.

Role	PDH ID#	Professional Development Activity	PDH Value	Date of Planned Accomplishment	Date of Actual Accomplishment	Documentation Complete?

\* Please note that several activities require you retain documentation of your activity (e.g. copy of presentation, syllabus, certificate of completion, etc). Please be sure to review these documentation requirements and keep them on file for XX years. In the event of an audit, these verification documents will be requested.



# INDEPENDENT/GROUP LEARNING FORM

NAME: \_\_\_\_\_

Date	Resource	Topic Area	Type and Content of Activity

DRAFT

*\* Depending on which PDA you choose, your documentation guidelines may be different. The Independent/Group Learning Form only applies to the Independent or Group Learning PDAs. If you selected a different PDA, this form is not necessary for you to complete. Please refer to documentation Guidelines on pages XX – XX.*





## Evaluation

*Evaluate the Professional Development Activity by considering the questions below. You may find it useful to evaluate each PDA after completing the Activity as well as at the end of the CPD cycle after completing all the Activities on your Learning Plan.*

How have your PDAs impacted your professional practice?

How will you apply any new knowledge?



**DORA is dedicated to preserving the integrity of the marketplace and is committed to promoting a fair and competitive business environment in Colorado. Consumer protection is our mission.**

