

**National Association of Church Business Administration (NACBA)
Continuing Professional Education (CPE) Policies**

Record Retention

NACBA will retain course and course participant records for five years. These records will include the following: course outline; list of course participants; dates and locations of presentations; names of instructors/discussion leaders; copies of participant course evaluations; and amount of recommended CPE credit.

Refunds

For stand-alone group live courses, there will be a \$20 administration fee assessed to every request for refund. Participant transfers and substitutions will be accepted with no administration fee ON or BEFORE the course date. No-Shows will forfeit the entire registration fee.

For group live courses offered during NACBA's annual national conference, the published conference cancellation policy will apply. A typical conference cancellation policy will have a \$50 administrative fee if cancelled earlier than approximately 60 days before conference, a \$100 fee if cancelled between approximately 30 and 60 days before conference, and no refund if cancelled within approximately 30 days of the conference.

For group internet based courses, cancellations made prior to 14 days of the Teleseminar will be eligible for a 75% refund. Cancellations within 14 days are not eligible for refund.

All cancellation and refund requests must be submitted in writing by electronic mail addressed to reg@nacba.net or by mail to: NACBA, 100 N Central Expy Ste 914, Richardson, TX 75080-5326.

Program Cancellation

NACBA may at its discretion cancel or replace a previously announced program with a program of similar content. NACBA will make every effort to provide sufficient notification of a change of title or cancellation. NACBA will provide a refund for the purchase of CPE credit only in those cases where a cancellation has occurred and no substitute program is provided.

Complaint Resolution

NACBA is committed to our course participants' satisfaction and will make every effort to resolve complaints in a professional and timely manner. If you have a complaint, please send it to info@nacba.net. Every attempt possible will be made to work with the submitter to come to a reasonable solution to the issue(s) at hand.

CPE Course Development and Updates

Workshops and courses offered by NACBA for CPE credit will be developed and taught by individuals or teams having expertise in the subject matter. Such expertise will have been demonstrated through practical experience and/or education. All courses will use activities, materials, and delivery systems that are current, technically accurate, effectively designed and

will contain the most recent publication, revision or review date. Courses will be reviewed annually (or more frequently if necessary due to the subject matter) by a qualified individual or team, other than those who developed the programs, to consider currency of the content, technical accuracy, attendee evaluations, and anecdotal feedback. The participation of at least one CPA will be required in the development of every program in accounting and auditing and the participation of a CPA or tax attorney will be required for each program in the field of study of taxes. Such reviews will occur before the first presentation of a course and again after each significant revision.

Learning Objectives and Prerequisites

The primary learning objective is to maintain or increase competency of participants through expert discussion, explanation and interactive questioning. The workshops and programs are designed for learners to exercise a practical understanding of new and current issues, as well as the latest changes, in a complex and continually changing industry. Learning activities will be based on relevant learning objectives and outcomes that clearly articulate the knowledge, skills, and abilities that can be achieved by participants in the learning activities. There are no prerequisites or advance preparation requirements for NACBA's group-live programs.

Program Knowledge Level

Workshops and courses offered by NACBA will be developed and executed in a manner consistent with the prerequisite education and experience of the participants. Our courses will be published as basic, intermediate, advanced, update, or overview, so that participants may determine if the courses are appropriate to their professional competence development needs.

Group Live Attendance Monitoring Process

To ensure compliance with NASBA standards for the reporting and record retention of CPE credits, NACBA adheres to the following attendance monitoring guidelines:

- Sign in sheets are required for all programs where CPE credit is offered.
- Participants will be given a CEU/CPE credit recording form for noting participation in a workshop.
- Participants must sign in upon arrival and make note of the line number they signed on their recording form.
- Participants must listen/watch for a code that will be given at a random time during the session and make note of such code on their recording form.
- At the conclusion of the conference, workshops, or courses the participants will submit their recording forms to NACBA to be inspected for compliance and to be matched against the sign in sheets.
- Every program will be monitored by at least one workshop convener who will greet the participants as they arrive and ensure that sign in procedures are adhered to.
- Certificates of completion will only be issued upon verification of attendance using sign in sheets, recording forms and personal observation.

Group Internet Based Attendance Monitoring Process

To ensure compliance with NASBA standards for the reporting and record retention of CPE credits, NACBA adheres to the following attendance monitoring guidelines:

- Participants must listen/watch for codes that will be given at random times during the session and make note of such codes. There will be at least three codes given per CPE credit hour.
- At the conclusion of the internet based course, the participants will submit their codes in writing by electronic mail addressed to reg@nacba.net or by mail to: NACBA, 100 N Central Expy Ste 914, Richardson, TX 75080-5326.
- Certificates of completion will only be issued upon receipt of the documentation containing the correct codes.

revised 9-20-2012