

SEATTLE PSYCHOANALYTIC SOCIETY AND INSTITUTE

CONTINUING EDUCATION COMMITTEE

POLICY AND PROCEDURE MANUAL

March 2016

Continuing Education Committee, Policy and Procedure Manual
Table of Contents

- Overview of the Committee.....Page 2
- Committee Chairperson Responsibilities.....Page 4
- Committee Member Responsibilities.....Page 5
- Project Guidelines and Procedures.....Page 6
- Program Development Process.....Page 8
- Invitation to Speak (Sample Letter).....Page 11
- Confirmation Letter (Sample).....Page 12
- Brochure Development Process.....Page 13
- Fee Structure For CE Workshops..... Page 14
- SPSI Continuing Education Event Data Sheet.....Page 15
- Sample Survey: Suggestions for CE Programs.....Page 16

Continuing Education Committee

Overview of the Committee

Goal of the Committee: The goal of the Continuing Education Committee (CEC) is to offer colloquia, symposia, lectures, workshops and seminars for the members of the Institute and for individuals and groups in the community. The Committee strives to present those programs which are not currently available in the community such as (but not limited to): child and adolescent psychoanalytic theories and process; contemporary and historical psychoanalytic theories and practices; applied psychoanalysis, such as an examination of the impact of culture, race, gender, sexual orientation and the arts to psychoanalysis.

Composition of the CEC: The CEC is chaired by a graduate analyst. The remainder of the committee is made up of graduate psychoanalysts, clinical associates, community members and other faculty who may or may not be analysts but are qualified due to extensive analytic training, to teach at a level commensurate with Institute standards. Whenever possible, the CEC has at least six members, including two clinical associates and a student in or a graduate of SPSI's psychotherapy program

Frequency of Meetings: The CEC meets at least four times a year (every other month during the academic year), to plan and evaluate programs for the upcoming year. Additional meetings are held when necessary.

Functions of the CEC: The CEC is responsible for planning and coordinating the faculty colloquia, seminars and symposia on topics relevant to psychoanalysis and classes on psychoanalytic topics of interest.

- The CEC plans and conceives of symposia and seminars to meet the needs of the Institute and community. It attempts to invite innovative, scholarly guests to talk on subjects of analytic importance. Seminars are organized to meet the Institute's mandate to disseminate psychoanalytic knowledge throughout the community. Seminars are presented at various levels of clinical experience to fit the needs of the participants. Programs should meet the standards required by APsaA and the ACCME for granting Continuing Education credit (see current APsaA guidelines and requirements, since this is revised periodically). Whenever possible, programs should be self-supporting or profit making.
- The Certificate in Advanced Psychoanalytic Psychotherapy Program (CAPP) is no longer a subcommittee of the CEC, but is a committee of the Institute.
- The "Opera and Psychoanalysis" program is a subcommittee of the CEC.

- The “Psychoanalysis and Visual Art” program is a subcommittee of the CEC.
- Oversight of Extension Courses is a function of the CEC.

Liaisons: The CEC works in coordination with other educational organizations in the community. The CEC also cosponsors and coordinates activities with other analytic organizations. The purpose of these relationships is to support and facilitate psychoanalytic education within the community. A secondary goal is to make analysts visible to other mental health professionals and thereby encourage analytic training and treatment.

Continuing Education Committee **Committee Chairperson Responsibilities**

The CEC is chaired by a graduate psychoanalyst who is appointed by the Nominating Committee of the Institute for a period of three years. The responsibilities of the Chairperson are as follows.

1. To ensure that the goals and directives of the CEC are being met.
2. To act as the liaison between the CEC and other officers of the Institute, including the Administrator, Director and Faculty Chairperson.
3. To act as the liaison between the CEC and other organizations in the greater psychoanalytic community.
4. To schedule and direct the meetings of the CEC.
5. To develop and collect items for the agenda for each meeting of the CEC.
6. To record or assign the recording of the minutes for each meeting of the CEC.
7. To provide consultation and assistance to CEC members as needed with the development of CEC programs, including facilitating applications to the American Psychoanalytic Assn. to ensure that CEC programs are able to offer CE credit.
8. To designate project lead and co-lead positions to CEC members.
9. To resolve conflicts and/or problems that arise, related to the programs and activities of the CEC.
10. To report on the activities and programs of the CEC to the Faculty as needed.
11. To request new members for the CEC from the Nominating Committee as needed.
12. To review and approve continuing education programs offered by other psychoanalytic organizations who wish to collaborate with the Institute, in order to provide continuing education credits.
13. To make sure that CEC programs are listed on the SPSI calendar and on other community calendars, such as the NWAPS website and calendar, by posting the information or requesting that the information be posted by the lead or co-lead for the event or by the SPSI administrator.
14. To update the Policy and Procedure Manual as necessary, in consultation with the CEC.

Continuing Education Committee **Committee Member Responsibilities**

The CEC is made up of graduate analysts, Clinical Associates, APPP students or graduates, and community members of SPSI, . The graduate analysts are appointed by the Nominating Committee of the Institute for a period of three years. The Clinical Associate representatives are typically appointed by the CAAO for a period of two years. Individuals may be reappointed at the end of their terms (unless this would keep others from joining the committee). It is also possible to extend an individual's term for a year to enable that individual to carry out their responsibilities as Lead or Co-Lead on a specific project. The responsibilities of the committee members are as follows:

1. Attend CEC meetings, and contribute to and generate ideas for various continuing education offerings.
2. Review and evaluate continuing education programs post-hoc.
3. Take the Lead and/or Co-Lead position on projects of interest and/or competence.
4. Assist the various Leads and Co-Leads as necessary.

Continuing Education Committee **Project Guidelines and Procedures**

Project Leads and Co-Leads: The committee chair assigns a Lead and Co-Lead when an invited speaker or a symposium is being considered. Usually this will be the committee member who is the most interested in the particular topic under consideration.

If a faculty member, clinical associate, non-SPSI colleague or a SPSI Board member initiates the idea and is willing to participate in the process, this individual should be included as either Lead or Co-Lead. The idea of assigning a Lead/Co-Lead is to include many individuals in planning SPSI educational events and also to assign responsibility so that great ideas do not get lost in the entropy of everydayness.

Project Lead and Co-Lead Responsibilities: Project leads and co-leads are responsible for:

1. Contacting the potential speakers and representing SPSI's wishes for a possible symposium.
2. Checking the speaker's availability, possible dates he/she can visit and ensuring there are no major conflicts (i.e., holidays, other analytic events, etc.).
3. Reporting to the CE Committee and the Chair about tentative plans (i.e., topic, dates, format, use of discussants, etc.), and obtaining input from the CE Committee and the Chair about potential plans.
4. Working with the Administrator to arrange for a venue immediately after a tentative date is arranged with the speaker.

Project Organization and Process: If the project has now reached the stage of development where there is agreement between the speakers and the CE Committee relating to topics, dates and venue, then the next stage of organization begins.

1. **Brochure:** A brochure is created with the cooperation of the speaker and Leads. The SPSI office is available to help with the creation of the brochure. **The brochure must be on the Administrator's desk no less than two months in advance of the event.** The brochure is submitted to the American Psychoanalytic Association to obtain CE and CME credit. It is also important to allow sufficient time for review to avoid errors,

- prepare for marketing, publicity, printing and mailing. (*See “Program Development Process” for further information.*)
2. **Honorarium:** An honorarium must be agreed to between SPSI and potential speakers. Local speakers usually receive no honorarium. Out of town speakers may be offered up to \$1000 (one thousand dollars). Only under special circumstances should \$1500 (one thousand five hundred dollars) or more be considered, and only if the revenues generated will clearly cover the costs. Always discuss this with the CE chair, CE Committee and/or Administrator.
 3. **Hotels:** We use local hotels to house our guests. If the guest wishes to reside elsewhere, we will reimburse them for the amount we would have paid for the hotel of our choice. We will cover the cost of the hotel room for one or two nights stay, but not ancillary expenses. If an invited speaker will be staying in Seattle longer at our request, then we will pay for a longer stay. Request that our Administrator make the hotel reservation and deal with questions related to housing.
 4. **Airline Tickets:** We will pay for one round trip coach ticket. If the visit to Seattle is part of the speaker’s plans (i.e., travel to other cities may occur), then we will pay for the coach fare that is relevant to the speaker’s time with us.
 5. **Ground Transportation:** We will pay for transportation to and from the Seattle airport, although sometimes a SPSI member will provide this service as a courtesy.
 6. **Pre or Post Symposium Dinner or Lunch:** if the speaker is willing, it is customary to organize a small dinner at a restaurant, We may organize a lunch instead, according to the speaker’s preference. The Lead will determine who should be invited to the dinner, arrange for a restaurant, and provide the speaker’s transportation to the restaurant and venue. The Lead or designee will pay for the meal and submit a billing statement to SPSI. SPSI will bill each attendee for their share of the meal. SPSI will cover the expense of the speaker and spouse’s meal. If local colleagues have participated as additional speakers in the program, SPSI will cover the cost of their meals as well.
 7. **Confirmation Letter to the Speaker:** After the above arrangements are confirmed, a friendly and inviting letter should be sent to the speaker confirming the arrangements and including specific details.
 8. **Speaker’s Expenses:** The speaker should submit his/her expenses to SPSI for reimbursement.
 9. **Post symposium Letter:** Following the symposium, a letter of thanks and appreciation is included with the check for the honorarium and other expenses.

During the time the speaker is in town, the Lead and Co-Lead will act as the speaker's guide. If the speaker is scheduled to meet with clinical associates during Friday classes, the Lead and/or Co-Lead will be responsible for getting the speaker to SPSI and to the symposium venue.

Program Development Process

1. Introduction of idea to CE Committee
 - a. The program idea may be introduced by anyone on the CEC, a SPSI member or community member
2. The CEC will evaluate the idea based on several factors.
 - a. The appeal to the psychoanalytic audience
 - b. Appeal to the general community, as an applied psychoanalytic topic
 - c. Fiscal feasibility
 - d. The appeal of the speaker
3. If the plan is approved by the CEC, a Lead and Co-lead will be assigned.
 - a. Typically the Lead is the person that introduced the idea to the CEC
 - b. The Co-lead is usually a volunteer, but may be asked to assist by the Chair of the CEC
 - c. If a member of SPSI outside of the CEC becomes the Lead, a member of the CEC will be the Co-lead
4. The Lead will contact the potential speaker, to inquire as to their interest
 - a. The Lead or Co-lead should first check with the Administrator for any potential conflicts on the community schedule.
 - b. The "Invitation to Speak" sample letter (see page 8) may be used and adapted to the speaker
 - c. The pertinent information contained in the invitational letter are:
 - i. Potential dates for the symposium
 - ii. Format of the presentations
 - iii. Honorarium
 - iv. Travel expenses
 - v. Contact information
5. If the speaker agrees, the next step is establishing and reserving a venue.
 - a. The Lead or Co-lead should recheck with the Administrator as to any potential conflicts with the date
 - b. SPSI or an alternate venue should be reserved. Potential venues may be discussed in the CEC meeting.
 - c. Refreshments during the symposium are ordered by the Administrator

6. Development of the presentation and travel arrangements are negotiated between the speaker and the Leads and include:
 - a. The titles, topics and structure of the presentations. The lead will present a proposal based on discussion in the CE Committee. This may include having one or more local colleagues present relevant clinical material for discussion, or having a local colleague serve as a discussant.
 - b. If we agree that one or more local colleagues will participate in the program, the choice of those colleagues is typically worked out in a CEC meeting.
 - c. Audio-visual or other needs
 - d. Travel arrangements
 - i. The speaker will arrange his or her own flight arrangements. SPSI will reimburse the speaker for the round-trip direct coach fare. Any additional or intermediary trips will be paid by the speaker.
 - ii. We will pay for one or two nights at a local hotel. If the speaker wishes to stay at a more expensive hotel, we will reimburse them for the amount we would ordinarily pay (see item 3, p.7 for further details).
 - e. As the details are worked out, the "Confirmation Letter" (see sample on page 10) may be sent to the speaker
7. Approval for Continuing Education Credit
 - a. Information necessary for approval of CME/CPE by APsA must be given to the Administrator, no later than two months before the symposium. (CEU's are granted by the NASW.)
 - b. Required information:
 - i. Title and description of the presentations
 - ii. Learning objectives (two or three for each presentation)
 - iii. Number of continuing education hours requested
 - iv. Draft of the brochure, including a biography of the speaker and other participants in the program
 - v. **Draft of the evaluation forms we intend to use**
 - vi. Faculty Disclosure Form signed by the presenter
 - vii. **Current application forms required by APsA**
8. Brochure development (see "Brochure Development Process on page 14)
9. Arrangement of a dinner (or lunch) for the speaker
 - a. Typically a dinner in honor of the speaker is arranged by the Lead or Co-lead for either Friday or Saturday night of the symposium; a lunch may be arranged instead
 - b. A restaurant is selected, in proximity to the symposium venue and reservations are made in advance
 - c. Members of the CEC, the Director of SPSI, discussants and any interested SPSI or community members may be invited

d. Payment for the meal:

- viii. The person who organized the meal pays the bill, and then applies for reimbursement from the Administrator. The Administrator should be supplied with: the amount paid and the names of all who attended the dinner.
- ix. The speaker (his or her spouse if present), and local colleagues who participated as additional speakers in the program do not pay for their meals (see item 6, p.7)
- x. The Administrator then reimburses the payee (less the amount of the payee's meal), and obtains payment from others at the dinner.

10. Transportation of the speaker: The Lead and Co-lead arrange for transportation for the speaker to and from the symposium.

11. Duties during the symposium:

- a. The Lead and Co-lead should be present for both days of the symposium to troubleshoot any problems that arise
- b. Typically the Lead or Co-lead introduces the speaker at each presentation.
- c. Registration for the symposium is arranged by the Administrator. Registration fees are waived for the Lead and Co-lead. They may also be waived for the Chair or another member of the CEC or SPSI faculty who put a substantial amount of time and energy into developing the program

12. After the symposium

- a. The Lead, Co-lead, and Chair should review the evaluations following the conference, to report back to the CEC
- b. The Lead and Co-lead should obtain the profit and loss statement, and number of attendees from the Administrator, to report back to the CEC.
- c. The Lead or Co-lead should write a letter of thanks and appreciation to the speaker. This can be emailed or sent on SPSI stationery, when the Administrator mails checks for the honorarium and reimbursement of expenses.

Invitation to Speak (Sample Letter)

Seattle Psychoanalytic Society and Institute
Continuing Education Committee
4020 E. Madison #230
Seattle, WA 98112

Date: _____

Dear _____,

The Continuing Education Committee of the Seattle Psychoanalytic Society and Institute (SPSI), would like to invite you to Seattle to speak about _____. We hope that you might be available _____.

Typically, we ask speakers to offer two presentations for our psychoanalytic community. (If the presentation is geared towards another audience as well, include this here.) The lectures consist of a Friday night presentation which is an hour and a half, and a Saturday morning presentation which is approximately three hours in length. (Include any information about which presentation would be directed towards what particular audience.)

SPSI pays coach round-trip airfare from your city to Seattle, transfers to and from the Seattle airport, hotel accommodation for one or two nights, and a \$1000 honorarium.

We hope this invitation is of interest to you as SPSI would be very pleased to host you in Seattle. (A statement about why it is we are inviting the speaker.)

Please let me know if you are interested, and (whether these dates/and what potential dates) would work for you.

Sincerely,

Continuing Education Committee
Seattle Psychoanalytic Society and Institute
Email address
Telephone Number

Confirmation Letter (Sample)
Seattle Psychoanalytic Society and Institute
4020 E. Madison #230
Seattle, WA 98112

Date:_____

Dear _____,

The Continuing Education Committee of the Seattle Psychoanalytic Society and Institute would like to thank you for agreeing to speak in Seattle. We look forward to your visit and presentations. Here is some information about what we need to organize the symposium, as well as a summary of the arrangements.

1. Your Friday night presentation will be one and a half hours in length and typically starts at 7:30pm. It will be entitled_____.
2. Your Saturday morning presentation will be _____ total hours in length, including your presentation, time for discussion, a coffee break, followed by _____. This presentation will be entitled_____.
3. Please let us know what your audio-visual needs are, and if you have other needs for your presentations.
4. We will need the following for the brochure: a brief biography; and, two or three brief learning objectives for each presentation. In order to meet our deadline for obtaining continuing education credit, we will need this material no later than _____.
5. SPSI will pay a \$1000 honorarium for your presentations. Our administrator will mail you a check after the presentation.
6. We need a completed W-9 form and signed Faculty Disclosure Form (attached or included.)
7. SPSI will reimburse you for coach roundtrip airfare from _____ to Seattle, but we ask that you make your own travel arrangements. Please provide us with a copy of your receipt for reimbursement.
8. SPSI pays for and will arrange your lodging at _____ for _____ nights, and your transfers to and from the Seattle airport. Please provide us with copies of your receipts for reimbursement.
9. If you prefer to stay at another hotel, we can offer you credit for the amount we would have paid at our arranged hotel.
We would like to arrange lunch or dinner in your honor on Saturday. Please let us know your preference.

Again, we are very much looking forward to your presentation. As I will be your contact person, please let me know if you have any questions or concerns.

Sincerely,

Continuing Education Committee, Seattle Psychoanalytic Society and Institute
Email address ; Telephone Number

Brochure Development Process

1. The CE Committee will decide whether to use an online brochure or a print brochure, and/or a printed Save-The- Date postcard for each program. We generally use online brochures and online Save-The-Date emails, unless we hope to attract a very large audience for the event in question.
2. The development of the brochure is a collaborative process between the Lead, Co-lead, and Administrator (as well as contracted vendors whenever we print and mail brochures or Save-the-Date postcards).
3. A draft of the brochure must be completed to submit to APsA with our application for CE credit. If we are using an online brochure, the Lead, Co-lead and Chair will decide when to email it in conjunction with the Administrator. If we are using a print brochure, the Lead or Co-lead needs to determine how much time will be needed for the design process, for printing, and for mailing. In order to ensure that the brochure can be mailed at least 4 weeks prior to the event.
4. Contents of the brochure:
 - a. Title and description of the programs
 - b. Date, times and venue(s)
 - c. Sponsoring organizations
 - d. CME/CPE/CEU hours offered
 - e. Learning objectives (generally 2-3 for each presentation)
 - f. Brief biographies of the speaker, discussant and/or introducer
 - g. Boilerplate disclosure statement from APsA regarding Continuing Education (See CME Boilerplate, page 16)
 - h. Conference schedule
 - i. Conference fees (See Fee Structure for CE Workshops, page 13)
 - j. Registration form
 - k. Contact information
5. If we are using printed material, either the Lead or the Co-lead should work directly with the selected designer and the SPSI Administrator to develop the brochure.
6. After the brochure is developed the Lead, Co-lead and Administrator review it for accuracy and for errors
7. When the final draft is completed, printed material will be sent on to a mailing service for mailing and distribution.

Fees for each program are adjusted individually after CEC discussion. However, we observe some general guidelines, including offering a discounted rate for SPSI members, for students, and for attending both parts of a two-part program. We offer a substantial discount for early registration, as a way of making our programs more affordable. We also charge less when our expenses are lower (for events held at SPSI, and/or events with minimal expenses related to our speakers). Here is an example of our typical fees:

FEE STRUCTURE FOR CONTINUING EDUCATION SYMPOSIA

CME/CPE/CEU PROGRAMS:

	<u>SPSI members</u>	<u>Non-members</u>	<u>Students</u>
Full program	\$90	\$100	\$50
Early registration	\$75	\$85	\$35
Friday only	\$40	\$45	\$20
Early registration	\$30	\$35	\$15
Saturday only	\$65	\$70	\$35
Early registration	\$55	\$60	\$30

SPSI CONTINUING EDUCATION EVENT DATA SHEET

This optional form is for internal use; communication with SPSI Administration and the CEC about planned CE events, and to keep track of necessary tasks in setting up an event.

LEAD AND CO-LEAD: _____

DATE(S) AND TIME OF THE EVENT: _____

SPEAKER: _____

TITLE OF PRESENTATIONS: _____

VENUE: Reserved____ Not reserved ____ Fee: _____

- **Contact Person:** _____
- **Location:** _____
- **Time(s) to reserve for venue:** _____

AUDIO-VISUAL NEEDS: _____ Reserved____ Not Reserved____

DISCUSSANTS OR ADDITIONAL PRESENTERS: Yes____ No____

- **Names of additional participants:**

CME/CPE TO BE OFFERED: Yes____ No____

- **Application Materials Submitted to APsA:** Yes____ No____
- **Date materials due:**_____ **Date submitted:**_____

CO-SPONSORSHIP: Yes____ No____

- **Organization:** _____
- **Contact Person:** _____

HONORARIUM AMOUNT: _____

HOTEL RESERVATION: Where: _____

- **Number of nights:**_____ **Reservations made:** Yes____ No____

AIRLINE RESERVATIONS (Reimbursement provided): Yes____ No____

IMPORTANT DATES:

- **APPLICATION DEADLINE FOR CME/CPE:** _____
- **SAVE THE DATE NOTIFICATION:** _____
- **SUBMIT INFORMATION FOR PRINT BROCHURES:** _____
- **MAIL BROCHURES:** _____

ADVERTISEMENT :

Forum Newsletter____ SPSI Newsletter____ WSPA____ WSSCSW:_____

Other: _____

OTHER INFORMATION: _____

SAMPLE SURVEY FOR SUGGESTIONS FOR CE PROGRAMS

DATE:

To: All SPSI Faculty, Clinical and Academic Associates

From: The Continuing Education Committee

Re: Suggestions for Continuing Education Programs

The Continuing Education Committee would like your input as to what speakers or topics you would like to see with respect to continuing education programs. Please complete the following brief survey and return it to , _____ (CE Committee chair) at _____ (email and/or mailing address) by DATE. Thank you.

1. Which speakers would you like to see at continuing education workshops?

2. What topics would like to have presented at continuing education workshops?

3. Would you be interested in participating in the presentation of a continuing education workshop? **Yes**_____ **No**_____

If yes, in which of the following ways:

- Helping the CE Committee to invite speakers, organize the workshops, and/or assist the out-of-town speaker during his/her visit to Seattle.

Yes_____ **No**_____

- Presenting a case or discussing a speaker's presentation:

Yes_____ **No**_____

4. Please offer any additional suggestions or ideas to the Continuing Education Committee.
