CURRICULUM REVIEWERS

(a) - Background: CTEC contracts with outside sources for the review of curriculum materials in order to ensure an objective evaluation. CTEC wishes to provide an efficient and knowledgeable response to providers who submit curriculum for CTEC review and approval.

(b) – Reviewer Staff: CTEC curriculum reviewers shall be comprised of a Senior Reviewer, and a minimum of 2 and a maximum of 4 additional curriculum reviewers.

(c) – Duties:

(1) Curriculum Reviewers and Senior Reviewer:

(A) Review provider curriculum for compliance with CTEC educational standards. This includes new provider applications, periodic reviews and audits.

(B) Complete assignments within the following time constraints:

- A maximum of 15 hours is allocated to review a qualifying education course; and
- The maximum hours allocated to review a continuing education course is 40% of the course's designated CE hours, but not less than 2 hours.

(C) Complete a CTEC standardized review report for each review.

(D) Attend the annual Provider Task Force meeting and subsequent Curriculum Provider Standards (CPS) committee meetings.

(E) At the request of the CTEC Board of Directors or the Curriculum Provider Standards Committee chair, attend meetings and perform duties requested by the Board or the CPS chair, including, but not limited to, testimony during provider appeals.

(2) Additional Responsibilities of Senior Curriculum Reviewer: In addition to the duties listed in CP16(c)(1) when performing duties as a reviewer, the designated Senior Reviewer will also perform the following duties:

(A) Along with administrative staff and CPS chair review resumes of potential candidates for open reviewer positions and recommend suitable candidates to the CTEC chair.

(B) Train new reviewers and monitor the first 3 curriculum reviews conducted by a new reviewer to ensure quality and accuracy of reviews and report findings to CPS chair.

(C) Respond to reviewer questions related to policy and tax expertise interpretation.

(D) Make recommendations for provider policy changes.

(E) Recommend updates and changes to the reviewer Check-the-Box Review Form.

(F) Attend the annual Provider Task Force meetings and CPS committee meetings (reimbursement for attendance is included as part of the Senior Reviewer's supplemental compensation).

(G) Systematically review the websites of providers ensuring compliance to advertising standards and ensuring the provider is otherwise complying with CTEC policies and education standards. Report violations of standards to CTEC administration for follow up and recommend provider for audit when violation of education standards are substantive.

(d) - Compensation:

(1) Curriculum Reviewers:

(A) Curriculum reviewers will be compensated for their reviews at an hourly rate established by the Board of Directors subject to maximum hours specified in CP16(c)(1)(B).

(B) When requested by the Board or CPS chair to attend meetings or provider appeals, reviewers (except the Senior Reviewer) will be paid their regular hourly fee for actual hours in attendance at the meeting.

(C) Any out-of-pocket expenses incurred by reviewers during their services to CTEC are the responsibility of the reviewers.

(D) Supplemental compensation for the additional services performed by the Senior Reviewer (as outlined above) is included in an annual stipend, determined by the Board of Directors, and paid the Senior Reviewer on a monthly basis.

(e) - Qualifications of curriculum reviewers are as follows:

(1) Reviewers may not be a current approved provider, or employed by or contracted by any such provider.

(2) Reviewers may not be related to, employed by, or be a business associate of a member of the CTEC Board of Directors (see GV04 – Self-Dealing Policy).

(3) Reviewers may not currently serve on the CTEC Board of Directors and must, at all times, work within CTEC policy.

(4) Reviewers must be a CRTP, EA, CPA or attorney with a minimum of 10 years experience in tax preparation. Experience includes preparing tax returns, auditing tax returns, and teaching tax law. They must also be proficient in California taxes.

(5) Reviewers must have expertise in tax research and provide their own research capabilities.

(f) - Solicitation of reviewers will be as follows:

(1) The above referenced duties, compensation, and qualifications of reviewers will be disclosed to potential candidates.

(2) A minimum number of hours expected from a reviewer will be disclosed to potential candidates.

(3) CTEC's current contracted hourly rate for curriculum reviewers will be disclosed to potential candidates.

(4) Administrative staff will keep submitted resumes on file for future review.

(g) - Selection:

(1) Applicants will submit a resume and three references.

(2) The Curriculum Provider Standards Committee will review resumes recommended by administrative staff and Senior Reviewer.

(3) Final candidates will be recommended to the Board.

(4) The Board will approve or reject a recommended candidate by majority vote. If Board approval is required more than a month before the next Board meeting, the Executive Committee can approve or reject the candidate by majority vote.

(h) - Contract:

(1) Contracts shall be for a period of one year.

Approved; November 30, 2001
CTEC Board of Directors
Responsibility: Board of Directors and Staff