

NON-CEE CPE EVENTS

INSTRUCTIONS



You should use this procedure if you intend to award CPE credits using the COPAS sponsor numbers (NASBA and TX numbers) for any presentation at a meeting or event that you did not directly obtain from COPAS Energy Education.

To meet all NASBA and best practice standards, all presentations must be instructed by an approved and qualified subject matter expert (SME).

NOTIFICATION FORM

You must notify the COPAS office at least one week ahead of advertising any event at which you will offer CPE to be awarded under the COPAS sponsor number.

The notification form is available on copas.org along with a completed sample copy; please download and complete the notification form and send to angie.knipe@copas.org to notify the COPAS office of your event.

Event Information

On the notification form you will provide the name and contact details of the person who will be the designated responsible administrator for the CPE.

You will also provide the location address, the date and time of the event and the cost of the registration.

The name of the presenter, and the title of presentation for which the CPE will be awarded must be included on the form, along with the date the presentation content was developed, and the name of the developer if different from the presenter.

You should provide a short description of the presentation content, the learning objectives, the length of the presentation, the suggested NASBA field of study (please refer to the provided NASBA document for this), and the suggested course level.

NASBA requires that the program level be appropriate for the intended audience and that all programs designated at the intermediate or advanced levels also have stated pre-requisites. You should include pre-requisites on the notification form if selecting intermediate or advanced as the program level.

In addition to the notification form you must provide

- ✓ A copy of your intended advertising material
- ✓ A copy of the presentation
- ✓ A copy of any student materials/handouts
- ✓ Presenter Bio
- ✓ Author Bio (if different from presenter)

ADMINISTRATOR

You will provide the name and contact details for a designated responsible administrator. The administrator will be responsible for

- ✓ Monitoring attendance
- ✓ Making sure the sign in sheets are completed
- ✓ Distributing and collecting course evaluations
- ✓ Completing and distributing certificates
- ✓ Returning required documents to COPAS

★ Please note that the COPAS office will continue to administer CPE and perform these duties for the National COPAS meetings.

PRESENTER

Your presenter may be a guest who you have invited from outside, or may be a COPAS Member. In either case your presenter must be both qualified and approved to present the material. To facilitate this and comply with NASBA standards and requirements you should provide a bio or resume for the presenter (and the author of the presentation if different from the presenter). Bios or resumes should include the experience and or qualifications which shows the presenter and or author to be a subject matter expert for the topic being presented.

PRESENTATIONS

1. Your presentation must be a Group Live presentation.
2. NASBA has specific standards for program measurement, which we must meet. Your presentation must have at least **50 minutes of educational content**

- This timing does not include the introduction of speaker/company or any administration tasks
- 50 mins of educational material = 1 CPE credit
- COPAS will determine the credits offered for the presentation

EXPLANATIONS REGARDING OUR REQUIREMENTS

Group live programs must employ instructional methods that clearly define learning objectives, guide the participant through a program of learning, and include elements of engagement within the program (NASBA standard no. 7).

Group live programs must have a real-time instructor while the program is being presented. Program participants must be able to interact with the real-time instructor while the course is in progress (including the opportunity to ask questions and receive answers during the presentation (NASBA standard no. 7).

LEARNING OBJECTIVES

All presentations must have at least one learning objective which is presented to the participants at the beginning of the presentation and it must be included in the presentation materials (ref: NASBA standard 3.2 no. 2).

ELEMENTS OF ENGAGEMENT

NASBA states that a group live program must include at least one element of engagement related to course content during each credit of CPE (for example, group discussion, polling questions, instructor-posed question with time for participant reflection, or use of a case study with different engagement elements throughout the program).

SUBJECT MATTER EXPERT

Learning activities must be developed by individuals or teams having expertise in the subject matter. Expertise may be demonstrated through practical experience or education, or both (NASBA standard No. 4).

CPE program sponsors must ensure that instructors are qualified with respect to both program content and instructional methods used (NASBA Standard No. 13).

MEETINGS CPE

NASBA has a specific standard regarding Committee or staff meetings qualification for CPE credits. They have declared that only the portions of committee or staff meetings that are designed as programs of learning and comply with these Standards will qualify for CPE credit (NASBA Standard No. 16-08).

All requirements are available in the [Statement on Standards for Continuing Professional Education \(CPE\) Programs Revised August 2016](#)

APPROVAL PROCESS

When we receive your notification form and other required items we will review the content and communicate with the administrator regarding any questions or missing information. When everything is in order we will:

- ✓ Approve the materials and the Subject Matter Expert
- ✓ Assign a class number or numbers for the event (each topic of presentation must have a separate class number)
- ✓ Confirm the official class details
 - Title, description, learning objectives, date of course version
 - Approved CPE hours
 - Field of Study
 - Level of the course
- ✓ Approve the advertising
- ✓ Send a CPE packet and instructions to the administrator

CPE PACKET

The CPE packet will contain:

- ✓ Instructions for the administrator
 - About his or her responsibilities
 - About the required return documents
- ✓ A Course Approval Form
- ✓ A Return documents cover sheet
- ✓ A Sign in sheet
- ✓ An Evaluation Form
- ✓ And A Certificate template

ADVERTISING A CPE EVENT

A sample flyer has been provided on the website. Prior to advertising an event please check your promotional material against the requirements and send that advertising for approval with your notification form.

If you advertise the title of a class or presentation for which participants will earn CPE in addition to the location, date, and time of the event, you must include specific NASBA required items on the promotional materials. Those items are

- ✓ The Learning Objectives
- ✓ Instructional Delivery method (always Group Live for your courses)
- ✓ The number of hours of CPE credit
- ✓ The Field of Study
- ✓ Any Prerequisites for the class (any class that is not a level BASIC class must have pre-requisites)
- ✓ Recommended or required Advance Preparation for the class
- ✓ The Program Level
- ✓ The Program Description
- ✓ Instructions for How to register
- ✓ The Cost if applicable
- ✓ The NASBA registry Sponsor Statement
- ✓ Additionally, if your class will be offered to any non-COPAS members your advertisement must detail how a registrant can see or find your cancellation, refund, and complaint policies

PARTICIPATION MONITORING

NASBA requires us to keep a record of attendance for classes earning CPE. The administrator must oversee the sign in procedure and monitor attendance. The administrator's responsibilities are as follows:

- Check that the
 - ✓ registered participants are listed on the sign in sheet
 - ✓ those present in the room sign in and
 - ✓ ONLY those present sign in
 - ✓ those who will receive a certificate **have checked YES in the CPE box on the sign in sheet**

EVALUATION SURVEY

NASBA requires all participants be provided with an evaluation survey and that the survey contain certain NASBA required questions. Our survey has been approved for use by NASBA. The administrator's responsibilities are as follows:

- Distribute and collect evaluations before issuing a certificate
- ✓ It is not necessary for participants to provide their names on evaluations
- ✓ Additional comments are welcome and encouraged

CERTIFICATES

NASBA requires specific items to appear on the CPE certificate and has approved our COPAS certificate for use. The administrator's responsibilities are as follows:

- Complete the certificates from the template
 - ✓ Write in the names of the attendees
- Scan in the certificates to make a copy
- Distribute the certificates to only those who attended the class
 - ✓ When evaluations are collected

RETURN DOCUMENTS

The final item is the return documentation. Record keeping is a key concern for NASBA about its sponsors.

A return cover sheet is provided with your CPE packet. The administrator's responsibilities are as follows:

- Complete the coversheet
- Collate the documents
 - ✓ The completed sign in sheet
 - ✓ The completed evaluations
 - ✓ The completed certificate copies
- Return the required documents either
 - ✓ By email to Angie.Knipe@copas.org or
 - ✓ By mail to Vanessa deSoto at the COPAS office