



# NASBA National Registry Summit

Nashville, TN September 17 - 19, 2014

## Looking to the Future

### Agenda

Wednesday, September 17, 2014

2:30 pm - 4:30 pm

#### Pre-Conference Workshop: Registry 101 - Legends Ballroom B

*Jeanetta Cothron, Regulatory Compliance Auditor*  
*Cynthia Woodlee, National Registry Administrator*

This workshop will provide an overview of the Registry and the Statement on Standards for Continuing Professional Education (CPE) Programs (Standards). It will provide details on the more significant processes of the Registry: the initial or additional delivery method applications; the renewal process; and the desk audit process. The workshop will describe the instructional delivery methods addressed by the Standards and focus on the significant aspects of development, presentation, measurement and reporting of each method. The workshop will also highlight the most common areas of non-compliance with the Registry and the Standards, so that appropriate procedures can be put in place to ensure compliance.

2:30 pm - 4:30 pm

#### Pre-Conference Workshop: Learning Objectives - Tips for Developing Compliant Learning Objectives - Legends Ballroom A

*Johnny Owsley, Instructional Design Administrator*  
*Miki Klein, Instructional Design Administrator*

This workshop will provide guidance on how to develop learning objectives that are compliant with the Standards. A common deficiency noted in most application and/or desk audit reviews involves the course learning objectives. Do the learning objectives clearly articulate the knowledge, skills and abilities that can be achieved by the participants in the learning activities? The workshop will also offer best practices specifically in the development of self-study program learning objectives to ensure those objectives can be assessed at the end of the course.

4:30 pm - 6:00 pm

#### Registration - Legends Ballroom Pre-Function Area

No planned evening activity. Opportunity to meet up with your network of colleagues and enjoy the downtown Nashville area.

Thursday, September 18, 2014

- 7:30 am - 8:30 am [Breakfast - Legends Ballroom B/C](#)
- 8:30 am - 8:45 am [Welcome Message - Legends Ballroom D](#)  
*Ken Bishop, NASBA, President & CEO*  
A NASBA welcome informing participants of current focus and projects.
- 8:45 am - 10:15 am [Keynote Address: Rules of Play: Using Games and Gamification to Drive Engagement - Legends Ballroom D](#)  
*Karl M. Kapp, Ed.D., CFPIM, CIRM*  
Karl Kapp, Professor at Bloomsburg University, will provide an interactive presentation modeling activities that can be used in the classroom to engage learners. The goal is to provide an overview of how games, game elements and game design can drive the learners toward greater understanding, retention and learning through interactive classroom activities.
- Come prepared to participate in interactive games and learn how to apply games and gamification to the instructional process!
- 10:15 am - 10:30 am [Break - Legends Ballroom B/C](#)
- 10:30 am - 11:15 am [Statement on Standards for CPE Programs: Overview of the Working Draft of the Revised Standards - Legends Ballroom D](#)  
*Jessica Luttrull, Associate Director, National Registry*  
*Panel of CPE Working Group Members*  
Members of the NASBA CPE Standards Working Group will provide insights as to the process for reviewing and evaluating revisions and modifications to the Standards. The panel will highlight some of the more significant areas of change in the current working draft of the revised *Standards*.
- 11:15 am - 11:45 am [Learning Objectives: Refresher - Legends Ballroom D](#)  
*Johnny Owsley, Instructional Design Administrator*  
*Miki Klein, Instructional Design Administrator*  
This session will briefly summarize some of the topics covered in the pre-conference workshop related to developing learning objectives that are compliant with the *Standards*, as this is a common deficiency noted in most application and/or desk audit reviews.
- 11:45 am - 1:00 pm [Lunch - Legends Ballroom B/C](#)
- 1:00 pm - 3:45 pm  
Back by popular demand, the breakout sessions provide the opportunity to network with colleagues and share knowledge and ideas. The breakout sessions will be moderated by members of the NASBA CPE Standards Working Group. The Working Group will receive your feedback and input regarding the current working draft of the revisions to the Standards, which will be provided to those who register to attend the Summit. There will be two opportunities to provide feedback on the working draft.

The first break-out session will be divided into the following groups: (1) Instructional Design/Content Development; (2) Self Study; and (3) Group Programs.

The second break-out session will be divided into the following groups: (1) Small to Mid-size Firms/Events; (2) External Vendors; (3) Large Firms/Events and In-House

### Session 1

1:00 pm - 2:15 pm

### Standards Working Draft Break-Out Session

- 1) Instructional Design - *Legends Ballroom B*
- 2) Self Study - *Legends Ballroom C*
- 3) Group Programs - *Legends Ballroom D*

2:15 pm - 2:30 pm

Break

### Session 2

2:30 pm - 3:45 pm

### Standards Working Draft Break-Out Session

- 1) Small to Mid-Size Firms/Events - *Legends Ballroom B*
- 2) External Vendors - *Legends Ballroom C*
- 3) Large Firms/Events and In-House - *Legends Ballroom D*

3:45 pm - 4:00 pm

Break

4:00 pm - 4:30 pm

### LearningMarket.org - The One-Stop Shop for the National Registry - *Legends Ballroom D*

*Courtney Stevens, Salesforce Administrator*

This session will provide an overview of the content of LearningMarket.org, the website for the National Registry. Participants will learn where to find applications, forms and templates as well as access the Standards and the Best Practices pages. The presentation will also provide tips in developing and maximizing your organization's profile page, which is a free benefit of membership on the National Registry.

5:00 pm - 7:00 pm

### Celebration Reception - *Legends Ballroom B/C*

Friday, September 19, 2014

- 7:30 am - 8:30 am [Breakfast - Legends Ballroom B/C](#)
- 8:30 am - 9:00 am [Debrief: Interactive Working Draft Discussion - Legends Ballroom D](#)  
*Jessica Luttrull, Associate Director, National Registry and Moderators from Break-Out Sessions*  
Moderators from the NASBA CPE Standards Working Group will summarize some of the comments and feedback on the current working draft of the revisions to the Standards from the break-out sessions on Thursday.
- 9:00 am - 10:30 am [Keynote Address: Making Learning Effective and Efficient through the Combination of Game Mechanics and Social Tools - Legends Ballroom D](#)  
*Krishna Depura, MindTickle!*  
Krishna Depura will demonstrate the MindTickle platform which enables businesses, trainers and individuals to transform their existing online content into an interactive learning experience. MindTickle engages the learner and makes learning efficient and effective through a unique combination of game mechanics (points, medals, badges and leaderboard) and social tools (profiles, comments, chat and walls).  
  
This will be a hands-on, interactive session sure to bring out the competitive spirit in all!
- 10:30 am - 10:45 am [Break](#)
- 10:45 pm - 12:15 pm [Panel: Sharing Innovative Delivery Method Ideas - Legends Ballroom D](#)  
The trends and technology in the learning arena are changing rapidly and the manner and format preferences of learners is changing in response to the multi-generational CPA population. This session will be comprised of a panel of CPE providers who are exploring, piloting or using innovative delivery methods for CPE training. This will be an opportunity to share knowledge, ideas and pitfalls in considering innovations in learning.
- 12:15 pm [Closing Remarks and Boxed Lunches - Legends Ballroom D](#)