NATIONAL BOARD FOR
CERTIFIED COUNSELORS®

Tips for Converting Live, In-Person Programs to Online Programming

As you transition to online programming, make sure you have a plan for how to satisfy all *National Board for Certified Counselors (NBCC) Continuing Education Provider Policy* requirements.

I. Live, In-Person Delivery Programs Converted to Live, Online Delivery Programs

Prerequisites

✓ ACEPs approved for Live Event Delivery Format are authorized to use online platforms to offer qualifying live (synchronous) programs.

✓ Approved single programs may also be delivered through live, online delivery formats, conditioned upon no material changes.

NBCC requirements for live, online delivery programs are the same as for live, in-person programs. For optimal online program functioning, you must consider how you plan to transition various programming features, including but not limited to:

- facilitating interactions between participants and presenter(s).

- obtaining accurate attendance verification.

- distributing and collecting program evaluations.

- distributing certificates of completion at the conclusion of the program.

- developing appropriate accommodations to program participants with legally recognized disabilities, including physical, visual, and auditory disabilities.

Additionally, you should make sure to use a high-quality technology platform appropriate for online programming and ensure that your organization has the capacity to run a high-quality online program.

To help enhance the learning experience for participants, some extra online programming components to consider include:

Determine if your program or training is suitable for online delivery. *Some programs or training approaches may not be well suited for online delivery,* **such as highly experiential programs.**

Practice using the technology platform functions prior to the program. For example, if you plan to use dyads, triads, or small group discussion, make sure you have the capacity to do this well.

Eliminate distractions such as clutter in the camera view and potential background noise.

Establish your online programming expectations and meeting etiquette concerning questions, mics, muting, breaks, cell phones, etc. at the beginning of the program.

Engage in the live chat function embedded within the technology platform. Consider integrating a moderator to help manage the chat messages.

II. Live Event Delivery Programs Converted to Home Study Delivery Programs

To adequately convert a live event delivery program to a home study delivery program, you should integrate the tips for optimal programming outlined above and consider the factors listed below.

Prerequisites

✓ ACEPs approved for Home Study Delivery Format are authorized to offer credit for recorded (asynchronous) qualifying live programs.

✓ ACEPs must maintain a policy concerning the confidentiality and security of participant information (Policy Section C.11).

Program selection is crucial.

Program selection is essential to successfully transitioning a live program to an online home study program that is consistent with Policy. Ask yourself, *Will a recorded and edited version of **this program** be meaningful to the home study program participant?* If one or more of the points listed below applies to your organization and/or live program, the program may not be suitable for a home study program.

- Live programs that are highly experiential

- Live programs that involve breakout groups

- Live programs with participant identifying information

- Live programs with various background distractions

- CE Providers with limited video editing capabilities

- *CE Providers who want to offer the same number of CE hours for the home study program

> ** Please refer to Provider Policy I.1 Live Program Credit Measurement and I.4 Home Study Program Credit Measurement to learn more about the differences between live program and home study credit measurement calculation requirements.*

III. Recording Live, In-Person and Online (sychronous) Delivery Programs for Home Study Delivery Programs

To effectively record a live event delivery program for a home study delivery program, it is best to record the live CE program without participants to ensure the recorded live, in-person or online CE program satisfies CE Provider Policy confidentiality and privacy requirements.

- CE Providers who plan to record a live program with participants should obtain expressed consent from the participants allowing the organization to use their image, name, information shared, etc. in the home study program.

- Without receipt of proper consent to include participant information or identity, CE Providers must protect the confidentiality of participants by concealing identifying participant information by **editing out** participant information or identity captured by the recording, without adversely impacting the quality of the program.

- Examples of identifying participant information can include on-screen names and affiliated personal or professional information, participant reports about personal or professional identifying information, and any actual picture or video of participants.

If you plan to record a live CE program with participants, consider the additional suggestions.

Recording a live, in-person CE program with participants:

🎤 Use microphones for presenter(s) during the program.

👆 Record only the presenter(s) and the educational content presented to help protect the confidentiality of participant information and identity.

🕐 Designate time for non-recorded interaction for direct participant engagement (e.g., name introductions, questions, personal reflections). For example, this time can be designated before and/or after the educational portion of the program.

Recording a live, online CE program with participants:

🎤 Mute the microphones of participants and prohibit the use of video or direct participants to turn off cameras and mute microphones/audio to help protect the confidentiality of participant information and identity. This also will help to eliminate background noise and maintain the quality of the recorded program.

📷 Direct participants to utilize the "chat function" for any communication with the presenter and/or other participants. This alternative form of communication during a recorded live program will help to protect the confidentiality of participant information and identity while fostering participant engagement. Make sure the chat function is not visible on the screen being recorded.

💬 Make the chatroom function available at all times.

IV. Transitioning Recorded Live Event Delivery Programs to Home Study Delivery Programs

Correctly editing the recorded live event program is essential to ensure a quality home study delivery program that also meets Policy rules. Refer to the list of *editing suggestions* below to help guide the delivery format transition.

- **Delays and breaks.**
  Any delay at the beginning, during, or end of the live program should be edited out. Examples can include time spent waiting for everyone to join a webinar and waiting time between the education portion of the program and the question-and-answer portion of a program. Breaks should be edited out.

- **Irrelevant instruction.**
  Instructions specific to a live program that are irrelevant instruction for a home study program should be edited out or avoided (e.g., instructions for how to complete the program evaluation or obtain a certificate of completion).

- **Unsuitable activities.**
  Some experiential learning activities that work well in a live program are not beneficial to the learning outcomes in a home study program and therefore should be edited out or avoided.

- **Privacy and confidentiality.**
  In the absence of obtaining proper consent from program participants, participant information and identity must be edited out or avoided to meet NBCC Provider Policy Confidentiality of Information requirements.

- **Distraction.**
  Problematic background noise and other environmental distractions must be mitigated. Examples can include shuffling paper, participant chatter, computer or phone notifications, etc.

- **Credit measurement.**
  It is likely that the edited home study program will be shorter than the live program; therefore, the CE Provider must calculate the correct credit measurement consistent with NBCC Provider Policy Home Study Program Credit Measurement requirements.

- **Quality.**
  Edits made to the recorded live program to comply with Policy rules must not adversely impact the professional quality of the program.

Postrequisites for live event delivery programs converted to home study delivery programs

- ✓ A Learning Assessment is required for qualifying Home Study Delivery Programs. Consistent with Policy rules, the CE Provider must develop and add a learning assessment to the home study program to help demonstrate program attendance and participation and to evaluate participant learning outcomes.

Related Resources

Tips for Designing a Home Study Program