ISA S⊕UTHERN

ISA Southern Chapter
Skip Kincaid, Executive Director
isasouthern@isasouthern.org
888-379-8733

Are you planning an educational event with content that applies to arboriculture? Individuals that hold *certifications* from the International Society of Arboriculture (ISA) can earn continuing education units (CEUs) at your event. This helps them maintain their certification status. Please be aware that the acceptance of an event for ISA CEUs is governed by International Society of Arboriculture policies and these policies are strictly adhered to and enforced. While *ISA Chapters and Components* typically review all requests for assigning pre-approved CEUs for events within their region, ISA reviews CEU requests for events that are of national and international scope.

As an event organizer, you can follow these steps to get CEUs assigned, approved, and processed for attendees:

1. Complete the "*pre-approval form"* (use the one found at the *ISA Southern Chapter website* and save it in your files) You can also download it HERE.   It can take up to two weeks to process your request for CEU pre-approval request. Please submit the "pre-approval form" as early as you can. This also gives us time to help publicize your event on the chapter website and newsletter if you'd like the extra publicity.

2. Send the completed "*pre-approval form"* to the Chapter office *isasouthern@isasouthern.org* along with a program agenda. If you provide an agenda as a separate sheet, indicate that on the form.   See the attached sample "pre-approval form" and "agenda" for an event and try to use a similar format for your submittal. Clear submittals with easy to follow agenda help your attendees and also help us to clearly identify session content, determine CEU eligibility and assign appropriate CEU codes. Realize that not all of your sessions and workshop content may not qualify for ISA CEUs.

3. The **agenda** should provide at least the following information:
   a. ***Event title, date, location*** (address if appropriate). If the event is virtual, such as a webinar (live or re-broadcast), list "webinar" in the city location on the form. List the date of the live event or the specific date of re-broadcast). If the event is to be recorded and available "on-demand" by learners, there are additional requirements for learners to earn a CEU (see next page).
   b. **Start and end time for each session**
   c. **Session title** with a brief explanation of the session topic.
   d. **Presenter name** and title or brief bio as needed.
   e. **Include break times** (if any), including lunch, etc

4. The Chapter office will review the form you submit and the event agenda and then assign the correct number and type of ISA CEUs based on the program length and content. Each session/event is assigned a specific ISA CEU code that is unique to that event. Depending on the type of event, a single code may be assigned for each day, or half-day, of an event.

5. The Chapter then sends the pre-approval info to ISA so they can officially record the event and the ISA CEU codes in their system. While the Chapter reviews the applications to pre-approve CEU codes for an event, ISA is the official monitor for credentials and records ISA CEUs that credential holders earn at workshops and other events.

6. Once the CEU codes are pre-approved, the Chapter will then generate and send you a confirmation letter and the official **sign-in sheets** you can use at the event. Participants that are ISA credential holders must sign the sheet to verify their attendance at each event/session. Wait until the end of each session or the event to collect signatures. (Note: See the second page of this document for guidelines for webinars.)

7. After the event is over, scan the signed sheets (or a list of attendees that you can verify attended with name and certification number) and email them directly to isa@isa-arbor.com. No need to follow up with the Chapter or send us the signed sheets. Send them directly to ISA. They have pre-approved CEU codes on file and will then credit the CEUs to the applicable ISA credential holders when submitted appropriately according to the data required on the sign-in sheets.

    If you have any questions, the Chapter office can answer them or help you to create and deliver a successful event.

    A few extra notes: **Keep in mind that ISA CEUs are assigned only for content that is relevant to arboriculture and applies to the domains associated with specific credentials**. Information about specific credentials, application process, and their domains (topic areas) can be found on the ISA website at: https://www.isa-arbor.com/Credentials/Which-Credential-is-Right-for-You

    Information about maintaining credentials can be found on the ISA website at: https://www.isa-arbor.com/Credentials/Maintaining-Credentials

The following are helpful guidelines we use to review and pre-assign ISA CEUs, these guidelines are not exhaustive and were created based on ISA Continuing Education Policies and relevant examples and technology at time of publication. These are subject to change.

ISA CEUs for virtual events (webinars)
You have options when preparing and delivering virtual content (for example, a webinar). While technology is creating new ways to deliver continuing education material, it creates new demands on the ways that you keep track of attendees to verify their attendance at an event/session. Here are a couple of common scenarios for dealing with CEU assignment and reporting for virtual events:

Live webinars/synchronous learning events:
A live webinar or broadcast is one that may include a live presentation by a presenter that shares their screen or provides live video content.

o For this type of event, there is no need for you to share a CEU code on the screen or announce a CEU code to the attendees. However, you will need to keep track of registrants that log-in for your event. When you promote your event, set up an on-line registration site for them and collect their name *and their ISA Certification number*. An ISA Certification number starts with two letters, followed by a string of digits, and ends with letters for each of their certifications. (For example SO-0000A) It can save some work on your part if you remind them what a Certification number looks like so they don't confuse it with their ISA membership number.
o Attendees must "attend" at least 80% of the session to be eligible for a CEU credit. Your platform for delivering the webinar may have "attendance tracking" capabilities, but not all services provide this. For example, most of the paid Zoom accounts will let you generate an attendance report after the event that includes the number of minutes that an individual was logged in. Note: It can be cumbersome, but you'll

want keep track of multiple viewers at one screen. This creates challenges to keep track of paid attendance v who gets CEU credit.

Non-Live webinars/learning events:
A non-live webinar or a re-broadcast is one that may include a presentation of a recorded event.

o   As with a live webinar, there is no need for you to share a CEU code on the screen or announce a CEU code to the attendees. However, you will need to keep track of registrants that log-in for your event. When you promote your event, set up an on-line registration site for them and collect their name and their ISA Certification number. An ISA Certification number starts with two letters, followed by a string of digits, and ends with letters for each of their certifications (for example SO-0000A). It can save some work on your part if you remind them what a Certification number looks like, so they don't confuse it with their ISA membership number.

o   The re-broadcast should occur at a pre-published specific date and time. The host of the event is in control of starting the event at its beginning and ending the broadcast at the end of the pre-recorded presentation. The attendee (or learner) cannot access this material "on-demand" and watch the material when and how (i.e., with video controls) they want. They cannot have access to fast-forward, rewind, or start and stop features during the presentation recording.

o   Attendees must "attend" at least 80% of the session to be eligible for a CEU credit AND you must verify this 80% with some type of "attendance tracking" capabilities, but not all services provide this.

Asynchronous/self-guided events
Asynchronous events are events that have been recorded and are to be offered to an audience asynchronously (meaning, anyone can access at any time and there is no specific date and time that attendees and/or speaker are present at the same time). Some refer to these types of events as "on-demand". They are typically recorded presentations that viewers can access at their leisure and watch at any time. Some are free to view while others may require a fee to access them, but there is no set broadcast time or verification that it has been viewed.

o   In order to earn CEUs for an asynchronous learning product, there must be an attached assessment tool (quiz), this would then be coded based on the number of question on the quiz, (20 questions = 1 CEUs, 30 questions = 1.5 CEUs). The Continuing Education provider must provide the assessment tool/quiz and grading for it, those who receive 80% or higher scores on these assessments can earn the CEUs for this product. The organization that provides the quiz will be responsible for grading and returning the scores to ISA (isa@isa-arbor.com).

o   *Asynchronous/self-guided content (e.g., video content or recordings available on YouTube) SHOULD NOT include a CEU code at the end of the recording. These events, if any, were coded for live/synchronous delivery only and can only be repurposed if it is pre-approved and recoded for this delivery modality with an additional assessment tool.*

These and other guidelines/policies for credential holders and continuing education providers are available at: https://www.isa-arbor.com/Credentials/Maintaining-Credentials

2023 Arborist Workshop
Jan 10-11, 202X
Maple City Conference Center
222 Main Street
Maple City, XX xxxxx

Program Agenda

Tuesday Jan 10 Program

Typical CEUs assigned by ISA Not needed for your submitted agenda	Start and End Time	Session title, speaker name, title or employer as needed
	7:30-9:00 am	Registration
1**CA,Mun**,Sci	9:00-10:00 am	*Identifying and Diagnosing Tree Insects,* Dr. Bug Expert, SP University
1**CA,Mun**,Mgt	10:00-10:45am	*Tree Inventory Analysis,* Steve Smith, XYZ Consulting
	10:45-11:00am	Break
1**CA,Mun**,Sci	11:00-Noon	*Selecting Trees for Tough Sites,* Marsha Jones, Gold Nursery
	12:00-1:00 pm	Lunch
1**CA,Mun**,Sci	1:00-2:00 pm	*Safe Pesticide Use for Controlling Tree Pests,* Carol Parker, Univ Ext
1**CA,Mun**,Mgt	2:00-3:00 pm	*Roots and Sidewalk Conflicts*, Dan Jones, Maple City
2**CA,Mun**,Mgt	3:00-5:00 pm	*Walking Tour of Maple City Street Tree Issues* Dan Jones, Maple City

Jan 11 CEUs = 7CA; 7Mun; 4Mgt&3Sci

Wednesday Jan 12 Program

	Start and End Time	Session title, speaker name, title or employer as needed
	7:30-9:00 am	Registration
1**CA,Mun,TW**,Mgt	9:00-10:00 am	*Tree Pruning Terminology,* Joe Climber, Diamond Tree Service
1**CA,Mun,TW**,Sci	10:00-10:45am	*Understanding Pruning Specifications,* Steve Smith, XYZ Consulting
	10:45-11:00am	Break
1**CA,Mun,TW**,Sci	11:00-Noon	*Writing A Tree Pruning Proposal,* Steve Smith, XYZ Consulting
	12:00-1:00 pm	Lunch
1**CA,**Sci	1:00-2:00 pm	*Selling Tree Work to Residential Clients,* Sue Sellers, High Tree Service
1**CA,**Sci	2:00-3:00 pm	*Plant Health Care Tips for New Sites*, Meg Walker, High Tree Service

Jan 12 CEUs = 5CA; 3Mun; 3TW; 1Mgt&4Sci

# of CEUs
Credential(s)
BCMA Category

If session titles are not clearly arborist related, you will need to provide a brief description of the topic. The session topics must be related to one of the subject domains for each credential. These domains can be found at https://www.isa-arbor.com/Credentials/Which-Credential-is-Right-for-You. Each credential has a set of subject domains listed in the applications found on this site. You do not have to "assign" which subject domain the session covers. ISA will assign it.

CREDENTIALS
CA = Certified Arborist
TW = Tree Worker Specialist
Mun= Municipal Specialist
BCMA Categories (Practice, Management, Science) – assigned for Board Certified Master Arborists