



1. PURPOSE

The purpose of this procedure is to ensure that our Fundamentals, CPIM Review, and CIRM Review courses are taught using only the most up-to-date revisions available from the Association while minimizing the cost to the Chapter.

2. PHILOSOPHY

Class participants must perceive that we provide high quality instruction. When the Instructor Guides and Visuals do not match the Participant Workbooks this perceived quality drops dramatically.

3. SCOPE

This procedure applies to the VP Education, his/her designee, and the course instructors.

4. POLICY/PROCEDURE

a. Definitions:

I. **Minor Version Upgrade.** A minor version upgrade refers to a slight improvement to the course material, and is denoted by a decimal point increase in the course number (e.g., from version 2.0 to version 2.1). When a minor version upgrade is released, a **Net Change Document** describing the changes made from the previous version will be available for download from the Instructor section of the APICS.ORG website.

II. **Major Version Upgrade.** A major version upgrade refers to either a significant change to the course content, a large accumulation of small changes to the existing content, or both. It is denoted by a whole-number increase in the version number (e.g., from version 2.0 to version 3.0). In instances where the major version upgrade is an accumulation of smaller changes, a Net Change Document may be available for download from the APICS.ORG. When the major version upgrade includes substantial changes to the course content, there will be no Net Change Document.

III. **Visuals.** The PowerPoint files or printed representations of the slides contained therein.

b. When the Association rolls a revision on course materials the only Participant Workbook that they sell will be the latest version. These Participant Workbooks are the ones our seminar students purchase. Therefore, it is imperative that instructors teach using the latest revision of the instructor materials.

c. When the Association makes either a minor or major version upgrade, they will no longer sell the instructor kit updates for the previous revisions. For example, if the revision changes to 2.3, they will no longer sell revision 2.2.

- d. At this writing, the Association prices for instructor guide updates are \$25.00 for a minor version upgrade and \$85.00 for a major version upgrade. If instructor guides get too far out of date a new instructor kit must be purchased at a cost of \$325. Therefore, the entire inventory of kits needs to be updated regardless of whether or not they are being used to avoid the higher cost of possibly purchasing a new instructor kit in the future.
- e. The contents of a minor version upgrade include only the changed pages of the instructor guide and a CD of the visuals. Note that if only a visual changes, the printed page will change because the visual is printed on the pages of the instructor guide. The contents of a major version upgrade include all pages of the instructor guide and a CD of the visuals.
- f. The Chapter will purchase **Major Version Upgrades** for all instructor kits in inventory.
- g. **Minor Version Upgrades** may be made by either purchasing the upgrades or updating them by hand using the Net Change Document depending upon Chapter financial position. Purchasing the upgrades is the preferred method because it reduces the chance of human error and looks more professional to the instructors. Regardless of method, all kits in the Chapter inventory must be updated and the old materials discarded.
- h. This is the procedure if the Chapter chooses to implement **Minor Version Upgrades** by hand using the Net Change Document.
 - I. Print the Net Change Document from the Association website.
 - II. Make the change using ink in the Instructor Guide and printed Visuals. Place a check mark on the Net Change Document to indicate that the update was implemented.
 - III. The PowerPoint files include the version number and date in the footer of every slide. To update this on every page you only need to update the slide master and it will change every page. You must update this data on every session within the class even if no change was made to that session. This prevents a poor-quality perception from the participants and gives the next instructor the confidence that he/she is working with up-to-date materials. Note that the Chapter no longer retains an inventory of clear plastic visuals that were used for overhead projectors.
 - IV. Minor corrections such as spelling in the introduction pages or book version upgrades when we don't use the textbook may not be implemented. If a change is not implemented, place an "X" instead of a check mark on the Net Change Document. Note: spelling mistakes on Visuals is not a minor correction due to the resulting poor-quality perception.
 - V. Type a cover page to indicate the update. Place this cover page and the Net Change Document (that shows the check and "X" marks) in the front of the Instructor Guide. See attachment for example.
 - VI. Burn a CD with the PowerPoint files of all sessions. Write the course name and version/date on the CD and place it in the Instructor Kit. Write



“Superseded” on the original CD and retain it in the Instructor Kit for copyright control.

VII. In preparing to teach the class, the instructor will review the Net Change Document in the front of the book to become familiar with the changes that were or were not made. The instructor will also ensure he/she is using the correct PowerPoint files.

5. ATTACHMENTS/OTHER CLOSELY RELATED POLICIES/PROCEDURES

a. Attachment(s)

PDF file showing an example of the cover page and Net Change Document.

b. Closely Related Policies/Procedures/Documents

05-050 for ordering new revisions of course materials.

03-022 for control of instructor kits.

6. RESPONSIBLE FOR MAINTENANCE AND COUNSEL CONCERNING THIS POLICY:

- The VP Education is responsible to ensure compliance to this procedure.