



1) PURPOSE

- a) The purpose of this procedure is to provide an overview of the activities necessary to manage Chapter course offerings. It ties other procedures together so that the entire process becomes clear.

2) PHILOSOPHY

- a) The Chapter will manage courses in ways that enhance the professional image of the Chapter by those who take and teach our courses.

3) SCOPE

- a) This procedure applies to public and in-house courses.

4) POLICY/PROCEDURE

- a) Course offerings and schedules are determined and publicized one year in advance for maximum C-BAR points.
- b) Course instructor kits will be delivered to the instructor at least one week prior to the start of the course so that the instructor can freshen up on the material. A kit checkout sheet will be completed and signed by the instructor and VP Education or designee. Refer to the Excel file: "Kit Checkout Sheets.xls."
- c) Attendance at courses often fluctuates at the first meeting or two. Once the final paid headcount is determined, but no later than the end of the month in which the course starts, the VP Education will determine the instructor pay by using the "Instructor Pay Calculation (Policy 04-005 Rev B).xls" file. The VP Education will complete an Expense Report form for this amount and email both Excel files to the Chapter Administrative Support Associate (CASA) with a copy to the instructor. It is important that this be completed in the same month the course starts because we accrue the expense in the same month as we recognize the revenue. The instructor's check will not be cut until just prior to the end of the course.
- d) The VP Education or designee will print Certificates of Completion for each paid attendee and have them signed by the Chapter President. The certificates must be received by the instructor before the last class so that they can be distributed by the instructor. It is the instructor's responsibility to destroy certificates that were not earned due to attendance requirements.
- e) Within one week after the completion of the course the instructor kit will be returned to the VP Education. At this meeting the kit contents will be matched with the checkout sheet and any deficiencies will be discussed personally with the instructor. The instructor must also provide the attendance roster and the course/instructor evaluation forms. It is preferable that the instructor be in possession of the check for instructor payment so that it can be delivered at this meeting. If not, the VP Education will notify the CASA to release the check. Checks should be received by the instructor within two weeks of the last class. A new expense report will be required if the instructor is responsible for loss or damage to kit contents and this will delay his/her payment.



- f) The VP Education will calculate a weighted average for the instructor and course evaluations using the instructions on those forms. Post these scores to the "Schedule of Classes.xls" Excel file. Retain the paper evaluations in a file.

5) ATTACHMENTS/OTHER CLOSELY RELATED POLICIES/PROCEDURES

- a) Attachment(s)
  - i) Excel file: "Kit Checkout Sheets.xls."
  - ii) Excel file: "Evaluation Forms – Instructor & Course.xls."
  - iii) Excel file: "Schedule of Classes.xls"
  - iv) Excel file: "Instructor Pay Calculation (Policy 04-005 Rev B).xls"
  - v) Excel file: "Attendance Roster Master Form.xls"
- b) Closely Related Policies/Procedures/Documents
  - i) 02-040 Recognition Certificate Preparation
  - ii) 03-002 Education Position Policy
  - iii) 03-007 Instructor Responsibilities
  - iv) 03-021 Course Scheduling & Registration
  - v) 03-022 Course Completion & Close-out
  - vi) 04-005 Fee Schedule
  - vii) 04-030 Income & Expense Reporting
  - viii) 04-031 Chapter Chart of Accounts Policy

6) RESPONSIBLE FOR MAINTENANCE AND COUNSEL CONCERNING THIS POLICY:

- i) VP Education