



1) PURPOSE

- a) The purpose of this procedure is to define the activities required to wrap-up a Chapter sponsored course.

2) PHILOSOPHY

- a) The Chapter manages its programs with a high degree of professionalism. As such, it is important to protect Chapter assets (instructor materials) and to pay instructors for their services promptly.

3) SCOPE

- a) This procedure is applicable to any individual(s) involved in the education function of the Phoenix APICS Chapter; e.g., the VP-Education, Education Directors, Chairpersons, education support, Chapter Administrative Support Associate (CASA), etc. The applicability extends to other members of the Chapter BOD to the extent that their input and / or output is required to the processes described.

4) POLICY/PROCEDURE

a) Definitions

- i) Chapter Administrative Support Associate (CASA). The person or company the Chapter hires to coordinate registrations, respond to phone calls, internet inquiries, do banking, write checks, make payments, and other administrative functions as assigned.
- ii) Course Session. Course Sessions are the identified sessions in the APICS student and instructor manuals. For example, Basics of Supply Chain Management has 10 sessions, Master Planning of Resources has 8 sessions, and the other 3 courses have 9 sessions each. Course Sessions are not to be confused with class meetings because more than one session can be covered during one class meeting.

b) POLICY

- i) The instructor is to be held accountable for the condition of Chapter property i.e. the Instructor Kit, while it is in his/her possession. Instructors are not allowed to damage, deface, and/or add notes, diagrams, or text to any material in the kit. Post-it notes are the acceptable way to make notations. The Chapter will repair any damage to the kit, including replacing any lost or missing items before returning the kit to inventory. The cost of returning the kit to its original state will be deducted from any fees owed to the instructor.
- ii) Students missing less than three (3) Course Sessions will receive Certificate of Completion. If the course participant does not meet the minimum attendance requirement the instructor may use their discretion for issuing a Certificate of Completion based upon the participants coursework accomplishments outside of class.



iii) No Certificate of Completion will be granted where attendance is less than 55%.

c) PROCEDURE

- i) The VP Education or designee will print the Certificate of Completion per Procedure 02-040 for each participant enrolled in the course. These certificates must be received by the instructor in time for the instructor to hand them out at the last night of class.
- ii) At the final class session, the instructor will have the participants complete a Course Evaluation and Instructor Evaluation as provided in the Excel file "Evaluation Forms – Instructor & Course.xls."
- iii) Upon return of the evaluations, the instructor will deliver the Certificate of Completion to each student. For in-house classes, an attempt should be made to schedule a company executive to participate in this task.
- iv) The VP Education or designee will meet directly with the instructor within one week after the last class to accomplish the following:
 - (1) Using the signed "Kit Checkout Sheet" that was completed when the kit was issued to the instructor, the VP Education or designee will inspect the kit for completeness and damage. Any problems will be discussed with the instructor and they will be given the chance to remedy the situation.
 - (a) If the kit is complete and undamaged, it is preferable to hand the instructor their payment check at this meeting. If the check is not available, the VP Education will notify the CASA to release the check. Instructors should receive checks within two weeks after the meeting to return the kit.
 - (b) If the kit is not complete or damaged and the instructor is not able to remedy the situation, the VP Education or designee will complete a new expense report for instructor payment with the cost of kit remediation deducted from the net pay. A new check will then be issued. This process will delay the payment to the instructor.
 - (2) The instructor will provide the VP Education or designee the completed Course and Instructor Evaluation Forms and the completed attendance sheet for the class.

5) ATTACHMENTS / OTHER CLOSELY RELATED POLICIES / PROCEDURES

- a) Attachements
 - i) Excel file "Kit Checkout Sheets.xls."
 - ii) Excel file "Evaluation Forms – Instructor & Course.xls."
 - iii) Excel file "Attendance Roster Master Form.xls."
- b) Closely Related Policies/Procedures
 - i) 04-005 Fee Schedule
 - ii) 02-040 Recognition Certificate Preparation
 - iii) 03-007 Instructor Responsibilities
 - iv) 03-019 Course Management Overview
 - v) 03-021 Course Scheduling & Registration



Policy Number: 03-022

Revision No. C

Policy Title: Course Completion & Close-out Procedure

Date: July 21, 2006

- vi) 04-030 Income & Expense Reporting
- vii) 04-031 Chapter Chart of Accounts Policy

6) RESPONSIBILITY FOR MAINTENANCE AND COUNSEL CONCERNING THIS POLICY

- a) VP Education