



1. PURPOSE

To document all of the Chapter fees in one document whether these fees are paid or collected.

2. PHILOSOPHY

The Chapter will set its fee structure in a responsible way to ensure the Chapter remains fiscally sound and fees are collected and/or dispersed in a uniform manner. Further, this policy applies to any Chapter member responsible for the collection, disbursement, and/or fiscal recording of Chapter funds.

3. SCOPE

The scope of this policy is all fees charged to participants of Chapter offerings as well as the fees the Chapter pays to course instructors.

4. POLICY/PROCEDURE

a. Definitions:

- I. In-House Course. A course which is held at a company in which only that company's employees can attend. There is special pricing to the company and a higher minimum attendance requirement as compared to public courses.
- II. Public Course. A course which is open to the general public. They may be held on a company site or other public place.
- III. Member. A person who's APICS or ISM or IMA membership is valid on the date of the PDM or the start date of the course.
- IV. APICS Student Chapter Member. A person whose APICS Student membership is valid on the date of the PDM or the start date of the course.
- V. Board member: A current, active member of the APICS Phoenix Chapter Board of Directors holding a VP or Executive position. Directors may be granted a discount at the discretion of the functional area VP.
- VI. Instructor – A current, active member of the Chapter that is contracted by the Chapter to teach an educational course per Chapter Policy 03-007 Instructor Responsibilities .

b. For payment deadline purposes, the Chapter will use the either the computer time-stamp on the Chapter website or the postmark to determine eligibility for fees and/or discounts.

c. Chapter Membership Fee. This fee is what the Chapter charges for membership. The Chapter membership fee must be added to the Association membership fee to calculate the total membership fee. Currently the Association membership fee is \$150 per member per year. To implement any



change to the Chapter Membership Fee an Association-provided form must be filled out, signed by the Chapter President, and sent to the Association.

- I. The Chapter membership fee for Individual Members is \$50.00. A portion of this \$50.00 fee is returned to the member through discounts per Chapter Policy 04-060 Chapter Membership Voucher Policy. Together with the Association membership fee, individual members pay \$200.00 per year.
- II. The Chapter membership fee for Corporate Memberships is \$250.00 per year. This number is five times the individual member fee above because five (5) memberships come with a corporate membership. A portion of this \$250.00 fee is returned to the member through discounts per Chapter Policy 04-060 Chapter Membership Voucher Policy. Together with the Association membership fee, Corporate Memberships are:

Tiers	Total # of Members	Amount Per Member	APICS Corporate	Local Chapter
Tier 1	5-24	\$200	\$150	\$50
Tier 2	25-99	\$190	\$140	\$50
Tier 3	100>	\$180	\$130	\$50

d. Professional Development Meetings (PDM).

	Prior to Deadline (72 hours before PDM)	After Deadline
Members	\$20.00	\$30.00
Non-Members	\$30.00	\$30.00
Student Members	\$10.00	\$30.00
Board Member	\$10.00	\$30.00

Fees may be set on a per-event basis that differ from these set rates. Examples may be for golf outings, plant tours, etc.

Cancellation Policy: Full refund if cancelled at least 72 hours in advance of PDM. Full payment required if cancelled less than 72 hours in advance of PDM. No-shows will be billed for full amount due.

- e. Per-person Public CPIM, CSCP, and Fundamentals Courses. The Chapter supplies OPS-MATH Spreadsheets for some courses. The Chapter also supplies the CSCP Learning Systems and the PowerPoint Slide booklet for public and in-house CSCP courses. The Chapter does not currently supply the CPIM or Fundamentals Participant Guides but may do so in the future



with an appropriate increase in price. Other materials will be ordered by and paid for by the course participants. Payment for course fee is required prior to the first class and those showing up without payment may be denied entry. The Chapter will include a one-year membership for all non-members and pass the cost to the class participant. The fee schedules below represent the early registration price. The Chapter may have a higher price for late registration as indicated on the Chapter website.

Public CPIM & Fundamentals	
Participant Category	Course Fee per Person
Members	\$495.00
Non-Members	\$695.00
APICS Student Chapter Member	\$175.00
Board Member	10% discount

CSCP 10-Session (Chapter includes CSCP Learning System)	
Participant Category	Course Fee per Person
Members	\$1,695.00
Non-Members	\$1,895.00
Board Member	10% discount

CSCP 3-Session (Chapter includes CSCP Learning System)	
Participant Category	Course Fee per Person
Members	\$1,195.00
Non-Members	\$1,395.00
Board Member	10% discount

Note: Student rates not discounted for CSCP because they generally do not meet the APICS requirements to take the exam.

Cancellation Policy: There is a full refund if cancelled two weeks or more prior to the first class. There is a full refund less a \$75.00 administrative fee per participant if cancelled less than two weeks prior to the start of the first class. There are no refunds after the start of the first class.

- f. Per-person In-House CPIM, CSCP, and Fundamentals Courses. The Chapter will not supply any student materials except OPSMATH Spreadsheets. Other materials will be ordered by the course participants or the sponsor company. A non-member fee is not charged and a membership is not supplied by the Chapter.

CPIM & Fundamentals In-House	
Number of Paid Participants	Base Course Fee per Person



8-10 (8 is the minimum class size)	\$520.00
11-20	\$495.00
21-30	\$445.00

CSCP 10-Session In-House	
Number of Paid Participants	Course Fee per Person
11-14 (11 is the minimum class size)	\$1,720.00
15-20	\$1,695.00
21-30	\$1,645.00

CSCP 3-Session In-House	
Number of Paid Participants	Course Fee per Person
11-14 (11 is the minimum class size)	\$1,220.00
15-20	\$1,195.00
21-30	\$1,145.00

The pricing logic used for In-House Courses is to set the fee for the middle fee bracket at the member price for the Public Courses.

Cancellation Policy: There is a full refund if cancelled two weeks or more prior to the first class. There is a full refund less a \$75.00 administrative fee per participant if cancelled less than two weeks prior to the start of the first class. There are no refunds after the start of the first class.

- I. Payment is expected two weeks prior to the first class. The VP of Education may establish payment terms with a company that holds more than one course during the BOD year.
- II. Payment may be made for all participants by company check or credit card or by each individual participant.
- III. If the minimum attendance is not possible, then the Chapter may offer the program to the customer at a higher rate.
- IV. The per-participant fee is determined by number of registrants two weeks prior to the start of the first class.
 - a) If payment is made for all registrants at one time by company check or credit card locate the per-participant fee in the fee schedule
 - b) If payment is made individually by each participant then registrations likely were not made all at one time. Registrations will be accumulated and the per-participant fee established two weeks prior to the start of the first class. Credit cards will not be charged until the per-participant fee is determined.

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- V. Participants added to the course less than two weeks prior to the first class will pay the amount based upon the fee schedule and the total number of paid participants to date. Once participants are paid for, the total course fee will not be recalculated if a new discount threshold is reached. For example, Company A pays for 10 participants of a CPIM course at \$520.00 each but adds one participant on the first night of class. The 11th participant will pay \$495.00 but the initial 10 participants are not re-priced at the lower fee. *(The rationale for this is that payment is expected two weeks before the course starts and we don't want to do refunds or credits. This simplifies our accounting and encourages companies to get it right the first time.)*
- VI. As a courtesy to our In-House Customers, participants added at the first class will not be denied entry due to lack of payment, however; the participant will be denied entry to the 2nd class if fees are not paid.
- VII. Once a customer has paid for a group of participants they may substitute participants up to the first night of class.
- g. Instructor Fees. These are the fees the chapter pays instructors for CPIM, CSCP, or Fundamentals courses based upon a part-time night class. Full-time accelerated in-house courses taught during normal working hours are compensated per paragraph 4i below. They apply to both Public and In-House courses. The number of students is determined by how many paid – not by how many attend. In the event that a course is taught by more than one instructor, the fees in subparagraph I, and II below will be allocated based on the percentage each taught (rounded to a whole %).
- I. Instructors are paid a base of \$37.50 per standard course hour plus an additional \$30.00 per student in excess of 5 students. Standard course hours are defined in paragraph h.
- II. \$100.00 per course if the instructor is on the APICS Association Qualified Instructor list. For courses taught by more than one instructor, this fee is shared by all Qualified instructors teaching more than 25% of the course. The Qualified Instructor Program expires January 1, 2010. It is replaced by the Instructor Development Program. After that date, the bonus is paid to instructors achieving the “Lead” or “Master” level.
- III. \$100 per new instructor(s) per course if the instructor trains a new, incoming instructor that co-teaches the course if the instructor attends at least one course that the new instructor teaches and submits an evaluation of the new instructor to the VP of Education.
- IV. The applicable IRS mileage reimbursement fee is paid per mile of travel to/from the instructor's normal starting location as reported on the instructor's W-9 to the course location. Use actual observation, Mapquest.com, Google maps, or similar website, to calculate mileage between the two points and round appropriately. This mileage is then multiplied by 2 (for round trip) and multiplied again by the number of



- class sessions taught for the course or attended by Mentor Instructors to arrive at the total mileage to be paid..
- V. Up to \$50.00 materials allowance per course to cover miscellaneous course materials used or purchased at the instructor's discretion. For courses taught by more than one instructor, any instructor teaching more than 25% of the entire course may request this reimbursement. Instructors are encouraged not to request this allowance if no costs were incurred. Receipts are required if the requested reimbursement exceeds \$25.00.
 - VI. Total instructor pay can be calculated using the Excel spreadsheet "Instructor Pay Calculation.xls"
- h. Standard Course Hours. The following table defines the standard course hours for the purposes of calculating instructor pay per paragraph g. The standard course hours for the purpose of calculating instructor pay may differ than the Professional Development Point contact hours allotted to the course. The table reflects the ability of the Fundamentals courses to be taught with or without the midterm and final exam. For courses not listed in this table, the instructor pay will be calculated as in Paragraph g but the standard course hours will be determined before offering the class. The Chapter will pay the instructor on the basis of these standard hours even if the instructor satisfactorily teaches the course in fewer hours, unless agreed upon prior to the start of the class.

Course Name	Standard Hours
CSCP 10-Session	30
CSCP 3-Session	9
CPIM – Basics	30
CPIM – Master Planning of Resources	24
CPIM – Detailed Scheduling & Planning	27
CPIM – Execution & Control of Operations	27
CPIM – Strategic Management of Resources	27
Fund – Inventory Control (with mid-term & final exams)	33
Fund – Inventory Control (without mid-term & final exams)	27
Fund – Manufacturing Control (with mid-term & final exams)	33
Fund – Manufacturing Control (without mid-term & final exams)	27
Fund – Operations Management (with mid-term & final exams)	33
Fund – Operations Management (without mid-term & final exams)	27
Fund – Planning (with mid-term & final exams)	33
Fund – Planning (without mid-term & final exams)	27



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- i. One-Day Seminars and accelerated in-house courses. There is no set fee for one-day seminars. Pricing is determined by factors such as fixed and variable costs, marketing costs, instructor fees, and revenue sharing plans (if applicable). Instructor fees for accelerated in-house courses taught during normal working hours must be negotiated prior to quoting the course to the customer and approved by the VP Education.
 - I. An individual gross and net revenue plan shall be done on each planned seminar or in-house accelerated course by the Chapter VP Education or designee.
 - II. The Chapter targets to earn at least 50% of the net revenue. However, many factors could apply and the final earnings percentage will be per the gross and net revenue plan developed before the course is offered.
 - III. For revenue-sharing seminars (with an outside partner); if the Chapter assumed any up-front costs that are borne even if the seminar is cancelled, then these costs, plus a profit margin, should be compensated when developing the gross and net revenue plan. This is necessary to avoid a partnership with somebody where the Chapter assumes up-front risk and then splits the earnings with a partner. If the partner is willing to share in the up-front risk then equitable returns for both parties can be negotiated.

 - j. The Excel spreadsheet Attachment "Course Revenue Plan.xls" should be used to analyze gross and net revenue for any future planned changes to this fee schedule. It may also be used to calculate gross and net revenue for individual courses held.

5. ATTACHMENTS/OTHER CLOSELY RELATED POLICIES/PROCEDURES

- a. Attachment(s)
- b. Closely Related Policies/Procedures/Documents
 - a. Chapter Policy 03-021, Course Scheduling and Registration
 - b. Chapter Policy 04-060 Chapter Membership Voucher Policy
 - c. Chapter Policy 03-007 [Instructor Responsibilities](#)

Excel spreadsheets named:

1. Course Revenue Plan (Policy 04-005).xls"
2. Instructor Pay Calculation (Policy 04-005 Rev B).xls

6. RESPONSIBLE FOR MAINTENANCE AND COUNSEL CONCERNING THIS POLICY:

- VP Education because most of this policy concerns the Education function. The price for PDMs and the membership fee are usually established in the annual budget and approved by the Board of Directors.
- VP-Finance for those situations concerned with Chapter fiscal accounting and policy
- VP-Programs for those situations involving PDM pricing and management.



Policy Number: 04-005
Policy Title: Fee Schedule
Date: June 1, 2008

Revision No. D
