

Description	Revision
Education SOP	7/28/2013
Owner:	
Director of Education	

SCOPE: The Director of Education is responsible for administering the Education SOP and will report education plan's progress to chapter's Board of Directors.

This Education SOP is designed to document policies and procedures supporting the education program.

Director of Education is responsible for developing and administering the education offerings for the chapter's program year. This program should be developed as a result of a needs assessment, or interest provided to the chapter, and shall be published no less than 6 months in advance of offering.

Director of Education is responsible for maintaining an active listing of Chapter qualified instructors and having list posted on the chapter website. To be considered a "qualified" instructor one must maintain participation in the APICS Instructor Development Program (IDP). Using this list, the Director of Education will work with and assign the appropriate instructor for each course; keeping in mind individual instructor's requirements to move to next level in the IDP.

Registration, Class or Seminar: Registration for scheduled classes or seminars will be responsibility of the Director of Education, unless delegated to another instructor. Registration can be accomplished by phone and is responsibility of each student or their representative. Information required to register is name, phone number, e-mail, and company. **Registrations for a class or seminar must be received with payment by the Director of Education no less than ten days prior to the first meeting of a class or seminar. This will allow chapter time to finalize necessary arrangements and students time to obtain the necessary materials and review them prior to class.**

If attendee is not a member of APICS they will be required to pay the non-member price for classes and seminars. This is \$200.00 additional for CPIM modules and CSCP and \$100.00 for seminars and workshops. Membership will be verified by a valid member number/card or from the chapter member list. Membership verification is the responsibility of the individual registering for the event.

Class Size: Generally the class size will vary on the type of course or where it is being offered. The desired size for a CPIM or CSCP module is 10 participants but up to 15 can be allowed. In-house training discussed below, addresses class size for courses of this nature.

Class Cancellations: Education offerings are a service to chapter members and every effort will be made to meet the published schedules. When there are not enough students to meet the breakeven point, the following actions will be taken by the Director of Education:

Mid Florida Chapter #208

1. The instructor pool will be surveyed for a capable instructor at a lower base fee.
2. If another instructor is not available, the assigned instructor will continue the class.
3. Either of the above actions will require the approval of the board.
4. Certification classes with less than three attendees will be cancelled only with board approval.

Course Pricing: The price structure of chapter offerings will be reviewed during the Board's annual planning sessions and provided the Director of Education. Members will be informed of these prices as each offering is advertised. Member and non-member pricing will be considered in this review process.

Discount Available: Any individual or company buying 5 or more seats is eligible for a \$100 per course discount.

For the CSCP, individuals who have purchased the learning systems and now feel they need to attend an instructor led CSCP session will be allowed to attend a CSCP for the difference between the price paid for the learning system and the advertised price for the instructor led session.

In-House training is also available and will be coordinated on a case-by-case basis with the Director of Education. When number of participants for in-house training exceeds 15, two sections will be required unless the company desires only one section. When 15 or more participants are in a class, company will be given one seat free. Company is responsible for course materials and any test expenses. In the planning phase of in-house training, a statement of expectations (work) will be developed with the company requesting the training to insure that all expectations are understood by both parties.

Instructor's Fee: Instructors will be compensated based on their level of recognition in the APICS Instructor Development Program. A rating in one certification will not be used to determine instructor fee in another certification. The attached Instructor Fee Matrix outlines the instructor fees for the various classes offered by the chapter. This matrix will be reviewed during the annual transition meeting and approved by the board.

For those CPIM and CSCP classes not held in the Fast Track format, the instructor will receive a monetary compensation per module for the longer commitment made by instructors of this type program. The compensation fee will be determined at the annual budget meeting of the board.

Per the CPA, it is required that instructors hold certifications for the review classes they teach (CPIM, CSCP), and are participating in the APICS IDP program before they instruct any educational offerings by the chapter.

Co-Instructors will split the compensation based on the most experienced instructor's compensation schedule above, and instructors must agree to this prior to the start of the course.

Mid Florida Chapter #208

The Mid-Florida Chapter will compensate the instructor per the Instructor Fee Matrix. All of the necessary IRS tax reporting will be the responsibility of each instructor.

Instructor Evaluation: Each class offering, open or in-house, will have an evaluation of the instructor conducted at the last session taught by that instructor. Forms for the evaluation are available from the APICS web site. Obtaining forms is the responsibility of each instructor.

Procedure for administrating the evaluation is as follows. A student will be chosen to administer evaluations and provided a large envelope where completed evaluation forms will be placed. For instructors other than the Director of Education, evaluation forms will be forwarded to the Director of Education for review. After review the forms will be provided to the instructor with any additional comments Director of Education may care to make.

Instructor Development: Director of Education will provide a mentoring program for developing qualified instructors considering the needs of the educational offerings. Recruiting new candidates will be an on-going objective with the intent of growing the number of instructors to handle the demand. Key measure for this area will be the instructor evaluations, which will be completed using the APICS Organizational standard evaluation form (Stock # 0107801/05). These evaluations will be summarized by instructor and provided to the chapter as each course is completed.

Any requirement to maintain individual records of instructor evaluation and amount of time taught for instructor maintenance is the responsibility of each individual instructor not the Director of Education. Instructors not maintaining this information and not meeting the review requirements of the APICS IDP will be not instructor any courses or seminar for the chapter.

In addition to criteria for the APICS Instructor Development Program, further criteria are:

Additional Instructor Development Criteria:

- Must agree to the fee schedule as stated in this SOP or as directed by the board
- Must demonstrate ability to engage with the audience
- Must demonstrate ability to manage course timetable
- Must be able to answer student's questions
- Must demonstrate ability to enhance and add personal experience to the material
- Must be committed to doing the job
- Must be willing to work with Instructor Coach
- Must be willing to develop a professional library to support teaching development

Marketing Program: The Chapter is responsible for developing and implementing a marketing program, which is designed to promote and grow the educational program as measured by the number of participants at each course. This is a responsibility of the Director of Marketing working with the Director of Education. Materials available from APICS will be used to maximize the effect of this marketing effort.

Mid Florida Chapter #208

Incidental Costs: Chapter will absorb the costs for the incidentals such as copying material etc.

Trip compensation and mileage as outlined in the Instructor Fee Matrix will be paid. To receive this, instructors must file an expense form as outlined in the chapter SOP.

Course Material: The Director of Education will communicate the materials required for each course. Participant is responsible for purchasing recommended course materials (Including the participant guides) unless otherwise noted.

APICS Mid-Florida Chapter owned materials may only be used for APICS Mid-Florida sponsored events unless otherwise approved by the Board of Directors. This includes the Instructor Guides and any course reference books purchased by the chapter.

Instructors are expected to maintain a current library of relevant materials to support their efforts in preparing and presenting education events for the chapter. This should go beyond those references listed in the various Instructor Guides to provide the instructor the background necessary to address the issues that will come up in the course of class.

Course Logistics and Reporting: The Director of Education is responsible for managing the course logistics; including the minimum requirements of an LCD projector (or similar presentation device), flip chart and markers, and appropriate seating for participants. These responsibilities may be delegated to any instructor developing a special project or course offering.