

Description	Revision
Education SOP	5/31/2011
<b>Owner:</b>	
<b>Director of Education</b>	

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

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

The Director of Education is responsible for developing and administering the education offering 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 the offering.

The Director of Education is responsible for maintaining an active listing of Chapter qualified instructors and having that 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 the individual instructor's requirements to move to the next level in the IDP.

**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.

**Canceling Classes:** Education offerings are a service to the members of the chapter and offered classes will not be cancelled. The following actions will be taken by the Director of Education:

1. The instructor pool will be surveyed and a capable instructor at a lower base fee will be assigned the course if available.
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.

**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.

To obtain the member price for a class attendees must provide a valid APICS member number to the instructor in charge of the class either before the class or at the first class meeting. For

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in-house training a company must provide at least one employee with a valid APICS member number to the instructor providing the training. As a very last resort the class will be cancelled.

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

In-House training is also available and will be coordinated on a case-by-case basis with the Director of Education. When the 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, the company will be given one seat free. The pricing will be based on the schedules listed above. The 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.

It is preferred 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.

The Mid-Florida Chapter will compensate the instructor per the Instructors Compensation Schedule. 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 the forms is the responsibility of each instructor.

The procedure for administering the evaluation is as follows. A student will be chosen to administer the evaluations and provided a large envelope where the completed evaluation forms will be placed. The envelope will be sealed and the individual monitoring the evaluation will sign across the seal. For instructors other than the Director of Education, the 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 the Director of Education may care to make. When the instructor is the Director of Education the sealed envelope will be forwarded to the Chapter President for review before going to the Director of Education.

**Instructor Development:** The Director of Education will provide a mentoring program for developing qualified instructors. Recruiting new candidates will be an on-going objective with

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the intent of growing the number of instructors to handle the demand. The 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.

In addition to the criteria for the APICS Instructor Development Program, further definition of terms and criteria are:

*Definition:*

*Experience Only:* A person without any certifications, but experience at teaching adults and has relative work experience in the field associated with the module being taught.

*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.

**Incidental Costs:** The chapter will absorb the costs for the incidentals such as Instructor Manuals, and Education Catalog brochures.

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. The participant is responsible for purchasing the course materials (Including the participant guides) unless otherwise noted.

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

**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.