Guide to
Continuing Education

for

Conferences
Seminars
Short Courses

Texas A&M ★ Engineering
Guide to
Continuing Education
for
Conference, Seminars,
and Short Courses

Texas A&M★Engineering
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June 2009
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Texas A&M Engineering  
Room 326 Wisenbaker Engineering Research Center (WERC)  
College Station, Texas 77843-3126
Mission

The mission of the Texas A&M Engineering Continuing Education is to coordinate quality, innovative programs that:

- address the lifelong continuing education needs of engineering professionals
- enable engineering professionals to experience and discuss dynamic changes in research and technology

Capabilities

- To provide faculty and staff with guidance in planning a continuing education conference, seminar, or short course.
GOALS

Does your mission contribute to the accomplishments of the Texas A&M Engineering goals?

**Goal 1: Learner Centered Instruction**

Coordinate quality, innovative programs that enhance professional development, career opportunities and lifelong learning endeavors of adult learners by targeting key areas of service and engaging in interdisciplinary exchanges through multiple sources.

**Goal 2: High Impact Scholarship**

Provide professional programs to prepare the learner for entry/re-entry into a changing world and create a baseline for professional career growth and leadership.

**Goal 3: Excellence and Diversity in Human Resources**

Serve as a conduit for a more ethnically, culturally, and geographically diverse faculty, staff and student body. Seek to support your department in creating new and on-going continuing education ventures by:

- Increasing the recruitment and retention of diverse audiences through direct marketing efforts
- Partnering with various community colleges, universities, centers and extension services on a state, national and multinational level
- Removing barriers to education for all citizens throughout Texas

**Goal 4: Financial Growth to Support Excellence**

Generate revenues from registration and external funding from partnerships, grants, private industry and cost-share ventures that will create funding reserves for cutting edge projects and professional activities as well as provide direct salary support/supplements for faculty, staff, or graduate students.
INTRODUCTION TO THIS GUIDE

Purpose of This Guide

The purpose of this guide is to address your basic questions about the presentation of a continuing education course. The guide also explains how to:

- develop a course and course materials
- prepare a budget for an open enrollment or sponsored course
- plan publicity and marketing of the course
- secure instructor compensation

In addition, we have tried to provide you with basic procedures and guidelines.

What is Continuing Education?

Continuing Education serves to transfer knowledge to the public and private sectors. Given the speed of change, continuing education becomes an efficient way for individuals to remain current in their fields. Graduate programs provide advanced education, but academically-focused continuing education provides life-long learning, particularly to individuals who need current knowledge more than they need credentials. Continuing education also provides university faculty a sense of the knowledge needs of individuals in the public and private sectors and can stimulate contacts with these sectors that lead to valuable research and improvements in academic courses and programs. (31.01.01.M3 – Supplements System Policy 31.01 and System Regulation 31.01.01)

Considering New Courses to Be Offered

Texas A&M Engineering encourages its faculty to propose new courses. Aside from the essential issues of course objective and content, other issues are especially important to assess if a course should be offered.

Continuing education courses should have a solid potential for generating sufficient income to support the substantial costs associated with developing, preparing, and publicizing a course. Factors to consider include:

- evidence of need and interest on the part of potential participants
- feasibility of reaching a well-defined audience with publicity materials
- budget
- schedule
- instructor staffing
- equipment and facilities needs
- relationship to similar courses offered both on campus and elsewhere
Open Enrollment versus Sponsored

Two types of continuing education courses are discussed in this guide. They are as follows:

- For an **open enrollment** course, the planning process must begin early because they depend on promotional efforts to generate enrollment. Typically, a flyer, brochure, or other marketing piece is designed and distributed (generally mailed) to a target audience. For example, the financial break-even point for an open enrollment course is 16-18 participants for a one-week course at $1295 per person.

- For a **sponsored course**, a company requests in-house training for its employees, so the audience is predetermined. The departmental business administrator will work with faculty member to determine the course budget. The faculty member is responsible for sending a letter of proposal to the prospective company, with an outline and the total cost of the course. If the company agrees to the terms of the letter, both parties sign and Memorandum of Agreement (MOA) prior to the course. A Memorandum of Agreement (MOA) example is included in this guide. A TEES project number is assigned and forwarded to the Office of Sponsored Research to activate the project.

Steps to Develop a New Course

This guide details the steps that you must follow to develop a new continuing education course. They are described in the sections that follow:

- Step 1: Determine if the Course is Needed
- Step 2: Create a Course Time Line
- Step 3: Develop a Course Description
- Step 4: Plan the Course Budget
- Step 5: Determine Course Fees
- Step 6: Publicize and Market the Course
- Step 7: Develop Course Materials
- Step 8: Route the Guest Lecturer Form
- Step 9: Route the Continuing Education Form
- Step 10: Evaluate the Course
- Step 11: Distribute the CEU Certificates
- Step 12: Send Thank-You Letters
- Step 13: Turn in Travel Materials for Reimbursement
Step 1: Determine If The Course Is Needed

**Instructions**

- Evaluate whether the proposed course is currently in demand.

- For a course to be successful there must be a present demand by prospective participants. A *perceived* need is not enough to make the course feasible.

**How Most Courses Develop**

- Most courses are developed from a mix of the professor’s expertise, research, and/or training in a particular field.

- Courses may be developed as a response to a demand expressed by industry or as a professional extension of a course currently taught at the university level.

**Needs Assessment**

- Fill out the Short Course Needs Assessment Form on the following page. This will help you evaluate what the proposed course needs will fill.
SHORT COURSE NEEDS ASSESSMENT FORM

1. How many lectures/seminars have you given in the last two years on this subject?

2. Who produced your previous lectures/seminars?
   - ☐ Self
   - ☐ Professional

3. What is your proposed title for this short course?

4. Is your topic new and unique?  ☐ Yes  ☐ No
   If so, how is your topic new and unique?

5. Is your topic new and unique?  ☐ Yes  ☐ No
   What is it?

   Who are your potential attendees?

6. What kind of competition exists from other seminars and workshops on a similar topic?

7. Have you developed a marketing plan for your course?  ☐ Yes  ☐ No

8. How often would this course be offered?  ☐ Annually  ☐ Biannually
   - ☐ Other
Step 2: Create A Course Time Line

Instructions

- Create a time line for developing and conducting the course. This will help you meet deadlines and have the course development progress at a steady pace.

- Use the sample time line in this section as a guide or checklist for planning the course.

Personnel

The time line notes who is responsible for each step to prepare the course.

The **instructor** for the course must coordinate with any other instructors involved in the course and is responsible for their preparations.

The **staff coordinator** is the person in charge of assisting the instructor in facilitating the course. Generally this person is within the instructor’s department.

**9–10 Months Before The Course**

- Complete the Short Course Needs Assessment Form to help you determine if the course is feasible.
- Prepare a time line for developing the course.
- Prepare a Continuing Education Activity Data Sheet on and provide it to Dawna Rosenkranz (Room 326 WERC).
- Select appropriate dates and location for the course.

**8–9 Months Before The Course**

- Secure the appropriate conference facilities.
- Establish the course budget.
- Determine the cost of the course. Are you going to accept cash, checks or credit cards? If so, you will need to contact Sandy Dunham in the TEES Fiscal Office to obtain receipt books and credit card slips.
- Develop the promotional materials.

**6–7 Months Before The Course**

- Finalize the brochure/promotional materials.
- Review appropriate mailing list(s) for a target audience.
- Begin mailing selected promotional materials (i.e., email, postcards or flyers announcing the course).
- Set-up fiscal account (if you do not already have one).
4-5 Months Before The Course

- Mail brochures and other promotional materials to the mailing list(s).
- Discuss travel regulations with guest lecturers.
- Request audio/visual requirements from professors and guest lecturers.
- Order textbooks if needed.
- Prepare course material.

4-6 Weeks Before The Course

- Send confirmation packets to the participants.
- Finalize coordination of course materials.
- Route the guest lecturer form and the Continuing Education Form (this may be done as early as 2-3 months before the course).
- Reconfirm room arrangements.
- Contact the duplication center to schedule reproduction of course materials.
- Contact the catering company for food and beverage needs.

2-3 Weeks Before The Course

- Continue accepting registrations.
- Confirm audio/visual requirements.
- Select on-site contact personnel.
- Schedule transportation for participants (i.e., bus services and special events).

3-5 Days Before The Course

- Reconfirm the room setup and course start time.
- Produce the advanced registration list.
- Prepare on-site class materials.
- Reconfirm the food and beverage requests. Remember to ask if any of your attendees have any special dietary needs (vegetarian, etc.)

1 Day Before The Course

- Set-up on-site class materials (i.e., name placards, badges, and course notebooks).
- Review any last minute changes with the staff.
- Distribute the initial class roster to instructor(s).
**Day of the Course**

- Arrive early to address any last-minute details and ensure food and beverage delivery.
- Route class roster for corrections/changes.

**Final Day of the Course**

- Distribute course evaluations to participants.
- Present the CEU certificates to participants after the completion of the course evaluations.

**After The Course**

- Provide a summary of the course evaluations to each instructor.
- Send thank-you letters to instructors and participants.
- Work with your departmental account to process the course expenses.
- Work with your departmental accountant to process supplemental pay and/or guest lecturer expenses.
Step 3: Develop a Course Description

Instructions

Prepare a course description very early in course development. This description should include:

- the title of the course
- a course introduction
- the proposed dates and location for the course
- the benefit to the participant
- course content
- who should attend
- key topics

Uses for the Description

The description of your course may be used in several ways:

- to develop promotional materials
- to describe the course and provide the company with a brief overview of the content
- to market the course in press releases.

Marketing Approach

Describe the course through the use of a marketing approach. Do not announce the existence of the course—sell it! Don’t assume that an informative title will automatically attract attention or that a description of the course content is enough to make it sound worthwhile.

The brief description must convince the managers of your prospective participants to spend their valuable company training dollars. Managers want worthwhile investments, and your job is to make sure they get it. Again, tell them which employees should attend and what valuable information participants will take back to the company.

With the average five-day program or short course costing from $995 to $1500 per participant, the description must immediately relate the direct benefits in that field. Industry buzzwords may help clue in professionals. Also remember that this training is generally not required by the company.
Step 4: Plan the Course Budget

Instructions

The budget planning process begins as soon as there is a demand and an audience for the course.

Some costs will occur only if the course is actually offered (e.g., instructor salaries, guest lecturer fees, and travel expenses). However, other costs will occur as soon as the planning process begins (e.g., publicity and mailing).

Publicity is a commitment that all courses incur (generally as an up-front cost, whether the course is successful or not).

Ensuring Cost-Effectiveness

Taking on a new course requires looking carefully at the demand for the course—what it will cost to present, who is the potential audience, and how it related to similar courses elsewhere.

The instructor’s goal is to provide quality courses to professionals already in the field. The decision to offer a continuing education course follows the mission to present professional development to practicing engineers and enhances Texas A&M University’s visibility in industry, while allowing for faculty incentive.

A faculty member who proposes a new course should consider that a typical course with average costs will require

- 16-18 participants to break even and
- 18-25 participants to be cost effective

This is a general estimate and is used for budget planning purposes only.

It is the responsibility of the professor to consider only those courses that have the potential for growth and will attract enough participants to break even.
The Preliminary Budget

The preliminary budget is developed at the onset of a proposed activity. All factors must be considered when developing the budget so the course does not suffer a shortfall in revenue. This budget is used to estimate costs associated with promotion of the course, instructor salaries, course materials, meeting rooms, and social events that may be included with the course.

In the preliminary budget, some of these factors will have to be based upon approximations. Nonetheless, the preliminary budget is considered a good-faith estimate and will be used to plan the basics of a proposed course.

It is important that the professors understand that a budget plan—preliminary or final—is not an allocation of resources to the professor. It is not the depositing of money into an account that the professor controls. Rather, it is a projection of expenses and earnings.

Open Enrollment Budget

The preliminary budget for an open enrollment should take into consideration the following factors:

- publicity
- faculty salaries
- faculty travel costs
- course notes
- course materials
- textbooks
- social activities
- food and beverages
- parking permits
- audio/visual requirements
- computer time
- administrative costs
- projected enrollment

Refer to the sample Open Enrollment Budget at the end of this section.
**Sponsored Budget**

The preliminary budget for a **sponsored** course may consider many of the same factors as in an open enrollment course. However, it will most likely be tailored to the specific course since the audience is predetermined.

The preliminary budget for a sponsored course should take into consideration the following factors:

- faculty salaries
- faculty travel costs
- course notes
- course materials
- textbooks
- food and beverages
- audio/visual requirements
- computer time
- administrative costs
- projected enrollment

Refer to the sample Sponsored Budget at the end of this section.
# Sample Open Enrollment Budget

## BUDGET PROPOSAL FOR CONTINUING EDUCATION ACTIVITY

<table>
<thead>
<tr>
<th>Title of Activity</th>
<th>Dates</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sponsor</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Estimated Fee</td>
<td></td>
<td>Estimated Number of Participants</td>
</tr>
</tbody>
</table>

### PROMOTION

<table>
<thead>
<tr>
<th>Item</th>
<th>Estimated</th>
<th>Actual Expenses</th>
</tr>
</thead>
<tbody>
<tr>
<td>Brochure Design (2 color)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Printing</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mail List</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mailing Service (Admail)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Postage</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Special Mailing (Airborne)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Additional Mailing</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Advertising (Poster)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pro-rate Calendar</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Sub-total**

### LECTURER COMPENSATION*

<table>
<thead>
<tr>
<th>Instructor</th>
<th>Salary</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Instructor #1</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Instructor #2</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Instructor #3</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Sub-total**

### FACILITIES

<table>
<thead>
<tr>
<th>Item</th>
<th>Estimated</th>
<th>Actual Expenses</th>
</tr>
</thead>
<tbody>
<tr>
<td>Meeting Room Charge</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Audio-Visual (Projector)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Sub-total**

### TRAVEL

<table>
<thead>
<tr>
<th>Item</th>
<th>Estimated</th>
<th>Actual Expenses</th>
</tr>
</thead>
<tbody>
<tr>
<td>Airfare (Instructor #3)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mileage (All Others)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Per Diem (Total All Instructors)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hotel (All Lecturers)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Sub-total**

### MATERIALS/SUPPLIES

<table>
<thead>
<tr>
<th>Item</th>
<th>Estimated</th>
<th>Actual Expenses</th>
</tr>
</thead>
<tbody>
<tr>
<td>Binders/Notebooks</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Participant Supplies</td>
<td></td>
<td></td>
</tr>
<tr>
<td>CEU Certificates</td>
<td>No charge</td>
<td>No charge</td>
</tr>
<tr>
<td>Copies</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Sub-total**

* For TAMU faculty, add 23% (for benefits) to lecturer compensation.
<table>
<thead>
<tr>
<th>FOOD SERVICE</th>
<th>ESTIMATED</th>
<th>ACTUAL EXPENSES</th>
</tr>
</thead>
<tbody>
<tr>
<td>Meals/Breaks</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Special Function</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Sub-total</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>TRANSPORTATION SERVICE</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bus Operations</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Sub-total</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>CREDIT CARD SERVICE FEES</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Department will be charged a percent of all credit card registrations.</td>
<td>AMEX Visa/MC</td>
<td></td>
</tr>
<tr>
<td><strong>Sub-total</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>COORDINATION FEE</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>$185 hours @ $</td>
<td></td>
<td></td>
</tr>
<tr>
<td>$178 hours @ $</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Sub-total</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>START-UP EXPENSES</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(Some conferences will include start-up expenses, such as planning meetings and course questionnaires.)</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Sub-total</strong></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
# Sample Sponsored Budget

**TEXAS ENGINEERING EXPERIMENT STATION**  
**BUDGET PROPOSAL WORKSHEET**  
**FOR IN-COMPANY SHORT COURSE**

<table>
<thead>
<tr>
<th>Title of Activity</th>
<th>Date of Class</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Client</td>
<td>Contact</td>
<td></td>
</tr>
<tr>
<td>Client Address</td>
<td>Phone</td>
<td>Fax</td>
</tr>
</tbody>
</table>

**Course Length** ____________ **Number of Hours of Instruction** ____________

<table>
<thead>
<tr>
<th>Number of Participants</th>
<th>Number of Participants Agreed Upon</th>
</tr>
</thead>
</table>

**SALARY**  
Per Day Instruction Rate per Instructor:

<table>
<thead>
<tr>
<th>Instructor</th>
<th>Rate</th>
<th>Days</th>
</tr>
</thead>
<tbody>
<tr>
<td>#1</td>
<td>$____</td>
<td>____</td>
</tr>
<tr>
<td>#2</td>
<td>$____</td>
<td>____</td>
</tr>
</tbody>
</table>

Sub-total: Instructor Fees  
Benefits: Salary x 16.5%  
Sub-total: Salary & Benefits

**COORDINATION FEE**  
$_____ x _____ hrs + $_____ x _____ hrs

**COURSE MATERIALS**

Textbooks: _____ x $____
Notebooks
Copies of Curriculum: _____ sets x _____ pages x $._____/page
CEU Certificates  
Postage/Shipping: Textbooks/Curriculum  
Other:  
Sub-total: Course Materials

**TRAVEL**

Airfare (Round Trip): ___ Instructors x $_____ each  
Mileage:
Ground Transportation: Cab Fares  
Per Diem/Instructor: $_____/day x _____ days x 2 Instructors  
Hotel: _____ nights x $_____/night

Sub-total: Travel

Sub-total of Expenses  
Indirect 26%

**TOTAL AMOUNT OF CONTRACT**
Step 5: Determine Course Fees

*Instructions*

There is no fixed formula for calculating participant fees for individual courses. Each course is examined in terms of its unique budget requirements, its history (if any), its competition, and its apparent market potential.

*Ensuring Market Potential*

A course with the best market potential is one for which its prospective audience can be specifically identified and can be reached with cost-effective publicity.

Courses with general-interest topics, multiple audiences, or vaguely defined audiences have considerably less market potential because no effective way exists to reach the attention of these “general” audiences.

*Average Cost*

In general, the average cost for a “training” or continuing education course is $275-$375 per day per person. A one-week course in engineering can range from $995-$1,500.

*Factors That Affect Course Fees*

Examine other courses similar to this continuing education course. Determine an appropriate fee based on budgeted costs.
Step 6: Publicize and Market the Course

Instructions

From the earliest stages of planning, you must think carefully about the marketing aspects of the course. Proper publicity and marketing has a direct effect on the success of a course. Knowing the market and the audience is essential when selecting mailing lists, sending out press releases, placing appropriate notices in trade magazines or journals, and listing key words for Internet searches.

Direct Mailings

Generally, for every 1,000 pieces mailed, you might expect that 10 (1-2%) of the recipients will register for your course (i.e., 10-20). Therefore, course promotion dollars must be spent wisely. Careful consideration of job functions, titles, and industries can further identify the target audience.

The success of direct mailing publicity generally depends upon three factors:

- the precise selection of the mailing list (50% of the effect)
- the content and what is being offered (30% of the effect)
- the creative element, including graphics, copy, packaging, and format (20% of the effect)

Selecting the right mailing list and advertising material is crucial to a successful publicity and marketing plan.

Other Ways to Market Courses

The following are ways to market courses that do not entail bulk direct mailings and are cost effective:

- personal contacts (i.e., sending a personal letter to colleagues with course announcements
- company contacts
- professional society contacts
- advertisements in trade magazines or journals
- requests for companies to post flyers on in-house bulletin boards
- Internet
Example of Marketing Plan

The following list is an example of a marketing plan for a continuing education course:

1. Determine the demand for the course.

2. Review similar courses being offered by competitors.

3. Offer a unique aspect to your course (i.e., hands-on demonstrations, expert lecturers in the field, a tour of a special research facility related to the course).

4. Select appropriate names from the rented mailing list in the course’s field (i.e., the American Society of Mechanical Engineers).

5. Select appropriate names from the former student’s mailing list.

6. Select appropriate names from in-house mailing lists.

7. Have faculty members take brochures or other promotional materials with them to conferences or meetings.
Step 7: Develop Course Materials

Instructions

One of the key components in a continuing education course is the course materials. Faculty members and guest lecturers must have ample time to produce high-quality lecture notes.

Equally important is having enough time to reproduce and bind the materials. The course materials and textbooks (if used) must be ready several days prior to the beginning of the course. Visual aids are critical and should reflect high resolution color and clarity. Most participants have attended a variety of other continuing education courses and can detect when the course materials are not high quality and seem to have been prepared at the last minute.

Deadlines to Ensure Quality

During the initial planning stages, establish deadlines for such key components as course materials.

By accepting the participants’ registration, we have entered into a commitment. That commitment implies that participants will receive the most up-to-date, high-quality, comprehensive program you can provide. Attendees deserve essentially book-quality course material.

Schedule the preparation, printing, and assembly of course materials very carefully and meet those deadlines. Course material replication and assembly are coordinated efforts. If your materials are late, they are likely to be omitted from the bound set of notes or inserted incorrectly into the binder.

Faculty members and guest lecturers must take responsibility for delivering their own materials and ensuring that all issues with securing copyrights have been resolved. Furthermore, faculty members must be responsible for delivering camera-ready copies of high-quality materials that can be reproduced exactly as submitted.

What to Include

Be sure to include only relevant material in your notes.

Include copies of all visuals: if you don’t, participants will be sure to ask for them. Well-prepared hand-outs also let your participants listen and take meaningful notes, as opposed to copying everything you show. A typical lecture is 1.5 hours in length and includes 15-30 minutes of discussion time. An average lecturer has about 15 pages of notes for each presentation.
How to Prepare the Course Materials

Lecture notes are reproduced on copy machines. Due to the automation and the sensitivity of these machines, special care is needed to prepare your material. Here are some suggestions:

- Prepare your notes and visuals specifically for the course. Do not recycle previously used materials because the notes will not be consistent. Remember that companies spend valuable training dollars ($995-$1,500 per participant) to send their employees to these courses. Make it count!

- Laser-print the master copy of all printed materials and visuals.

- Keep visuals simple and use large type (18 or 24 point).

- Leave adequate margins on visuals and printed material. At least 1.25 inches on the sides and 1 inch on the top and bottom.

- Halftones (photographs) do not reproduce well on a copy machine. If you need to, use a professional copy center to help you.

- You must obtain written permission from the copyright holder to reproduce any copyrighted material (especially from copyrighted books). You must also acknowledge in the notes that permission was received. In light of numerous recent lawsuits against copy centers, be especially careful about this.

- Make sure that all graphics are done with black ink. Those done in light pencil or with screens (shading) do not reproduce well.

Review of Printed Materials

Faculty members and lecturers should review the final copy of the course materials ahead of time to ensure quality.

Also ensure that enough copies of your course notes have been printed so that each attendee and lecturer has a complete set.

Refer to Continuing Education Information Series: Inventory Checklist as a visual guide for course preparation.
## Continuing Education Information Series
### Inventory Checklist

### Staff Supplies

<table>
<thead>
<tr>
<th>Need</th>
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<td>Whiteboard</td>
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<td>Markers</td>
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<td>Pencil Sharpener</td>
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<td>Easel and pad</td>
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<td>Name Tags</td>
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<td>Scissors</td>
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<td>Hole Punch</td>
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<td>Masking Tape</td>
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<td>Lectern</td>
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<td>Transparent Tape</td>
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<td>Microphone/ lapel mike</td>
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<td>Rubber Bands</td>
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<td>Direction signs</td>
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<td>Ruler</td>
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<td>Stapler</td>
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<td>Other____________</td>
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<td>Staple Remover</td>
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### Participant Supplies

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<td>Pencils</td>
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<td>Name tags</td>
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<td>Tablets</td>
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<td>Place cards</td>
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<td>Folders</td>
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<td>Paper clips</td>
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<td>Notebooks</td>
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<td>Water pitchers</td>
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<td>Hole punch</td>
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<td>Glasses/cups</td>
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<td>Scissors</td>
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<td>Candies</td>
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<td>Stapler</td>
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### Content Materials and Equipment

#### 1. Printed materials

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<td></td>
<td></td>
<td>Books</td>
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<td></td>
<td>Overhead projector</td>
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<td></td>
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<td>Articles</td>
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<td>Infocus unit</td>
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<td>Summaries</td>
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<td>Laptop computer</td>
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<td>Other_________________</td>
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<td>Tape recorder</td>
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<td>Extra bulb, etc.</td>
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#### 2. Prepared visuals

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<td>Posters</td>
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<td>Slides</td>
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<td>Videos</td>
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#### 3. Audio Materials

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<td></td>
<td>Tapes/cassette recorder</td>
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<td></td>
<td>Models/ Instruments</td>
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<td>Other_________________</td>
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<td>Other____________</td>
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</table>

#### 4. Equipment

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<td></td>
<td>Infocus unit</td>
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<td>Laptop computer</td>
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<td>Tape recorder</td>
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<td>Extra bulb, etc.</td>
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</table>

#### 5. Packaged materials

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<td>Workbooks</td>
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<td>Other_________________</td>
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#### 6. Demo materials

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</thead>
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<tr>
<td></td>
<td></td>
<td>Models/ Instruments</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Other_________________</td>
</tr>
</tbody>
</table>
Step 8: Route the Guest Lecturer Form

Instructions

For guest lecturers (non-Texas A&M University faculty), complete the Request for Approval to Pay Consultant/Lecturer or Professional & Non-Professional Services form. Biographical information the guest lecturer must be included with this form.

This form should be turned in at least six weeks prior to the course. The form will be routed to obtain the approval of signatures of the Director, Division Head, and Assistant Vice Chancellor of Engineering.

Form

See the Biographical Information Sheet and the Request for Approval to Pay Consultant/Lecturer or Professional & Non-Professional Services form at the end of this section.
Biographical Information Sheet

Name: ______________________________________

Address: ______________________________________

City: ___________________ State: _______ Zip: __________

Title of Presentation: ______________________________________

Social Security Number: ______________________

Please attach a one page curriculum vitae to this form.
Approval is requested to pay the below named individual for providing the indicated services for the Texas Engineering Experiment Station (TEES).

Name: __________________________ Social Security Number: __________________________

Title: __________________________ Citizenship (if other than US or Permanent Resident Visa Type: __________________________

(Attach Form 8233, copy of visa and copy of I-94)

Permanent Mailing Address: ______________________________________________________

Have you ever been employed by the State of Texas? (If yes, where? Please give beginning and ending dates.) ___ Yes ___ No

Historically Underutilized Business (HUB) means a corporation, sole proprietorship or joint venture for the purpose of making a profit in which at least 51 percent of all classes of the shares of stock or other equitable securities are owned by one or more persons who are socially disadvantaged because of their identification as members of the following groups who have suffered the effects of discriminatory practices or similar insidious circumstances over which they have no control.

Are you a certified HUB with the State of Texas? ___ Yes ___ No

If no, would you like more information about becoming certified with the State? ___ Yes ___ No

Biographical Information is mandatory for payment to Professional Service Providers and Consultant. Please attach as applicable.

Payee Signature: __________________________ Date: __________________________

Nature of Services to be performed:

Consultant/written agreement required Professional Services

Lecturer (Research) Other Contracted Services (Over $2,000 state money or $5,000 local money requires purchase requisition

Description of Services to be performed (be specific): ______________________________________________________

Proposed Payments: (Attach Agreement) Date(s) of Requested Services (Inclusive):

<table>
<thead>
<tr>
<th>Service</th>
<th>Amount</th>
<th>From</th>
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<tbody>
<tr>
<td>Transportation</td>
<td>$</td>
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<tr>
<td>Meals &amp; Lodging</td>
<td>$</td>
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<tr>
<td>Fee</td>
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<tr>
<td>Other (Specify)</td>
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<td></td>
<td></td>
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<tr>
<td>Estimated Cost</td>
<td>$</td>
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</table>

Certification: The services provided by this Consultant/Lecturer/Professional/Non-Professional person are 1) essential and cannot be provided by persons receiving salary support under the grant or otherwise compensated for their services, 2) a selection process has been employed which sustains that the payee is the most qualified individual available, considering the nature and extent of the services required, 3) the fee is appropriate, 4) proper documentation is attached which supports the first three standards, and 5) the Consultant/Lecturer/Professional/Non-Professional person (is not) specifically named and approved in the grant/contract proposal or a reviewer paid by the program sponsor if sponsored funds are being used, 6) the services are not being performed in any TAMU/TAMUS facility.

Requested by: __________________________ Date: __________________________

Director, TEES Office of Sponsored Research: __________________________ Date: __________________________

Division Head: __________________________ Date: __________________________

Assistant Vice Chancellor, Engineering: __________________________ Date: __________________________

Return completed form to: __________________________ Mail Stop or fax #: __________________________
Step 9: Route the Continuing Education Form

**Instructions**

Approval for the continuing education course must be obtained before the start of the course, using the Continuing Education Form. For some courses this approval may be granted 2-3 months before the course; for other courses it may be 4-6 weeks before the course.

Either the professor or the staff coordinator initiates this form. The completed form should be routed to Dr. César Malavé for final approval.

Note that the approval process may result in a denial for either conducting the course or receiving compensation. Therefore, this form **must** be processed before the start of the course. Also, in cases where this procedure is not followed, compensation may not be approved as requested.

**Forms**

See the sample forms at the end of this section.

1. Continuing Education Form
   A. Request for Approval of Activity
   B. Request for CEU Assignment for Activity

2. Request for Compensation for Contribution to a Continuing Education or Other Extra Curricular Activity

   A. Request for Approval of Activity

      Fill in the information about the activity.

   B. Request for CEU Assignment of Activity

      Fill in the information requested and attach a copy of the outline or brochure that includes course description, objectives, intended audience, and proposed schedule.

      Texas A&M University is authorized to issue only Continuing Education Units (CEU) and Professional Development Hours (PDH) “credit” for courses. Texas A&M University will determine the number of CEUs/PDHs earned for the course. CEUs/PDHs must be assigned prior to the course.

      The number of CEUs is determined by the number of contact hours in a course: 1 CEU for each 10 hours of classroom contact.
**Definition: CEU**

The *CEU* is the nationally recognized unit designed to provide a record of an individual’s continuing education achievements. CEUs are technically not “credit” in the conventional university sense, but they are measures of participation used by industries for annual training goals or requirements for employees.

C. Request for Compensation for Activity

Texas A&M* Engineering faculty may hold a variety of appointments within the university. Texas A&M* Engineering must follow university payment policies and procedures applicable to those different categories of appointments.

Faculty members and professional staff holding teaching positions are eligible for supplemental pay. Teaching positions can include Professor, Associate/Assistant Professor, and Lecturer.

Payments to faculty can usually be made directly and promptly by using the Continuing Education Form. A copy of the revised form is on the following page.

This form must be completed before the course begins. However, the supplemental pay will not be released until after the course is completed. The supplemental pay is processed within the next biweekly payroll. Note that if the course registrations do not provide enough income to adequately cover all direct expenses, compensation may be adjusted accordingly.

Signatures from the primary Instructor, Department Head, and Dean of the designee affirm that the request’s approval and that the individual(s) receiving payment are in good standing with the university.

(Guest lecturers receive payment through the Request for Approval to Pay Consultant or Professional & Non-Professional Services form.)
CONTINUING EDUCATION
ACTIVITY DATA SHEET

CONTACT PERSON: ____________________________
ACCOUNT NUMBER: ____________________________

MAIL STOP: ______ PHONE: ______ ACCT. NAME: ____________________________

PROGRAM TITLE: ____________________________________________________________

DATE(S): _____________________________________________________________

LOCATION OF PROGRAM: ____________________________________________

(CITY) (STATE) (ZIP CODE)

SPONSOR OF PROGRAM: TEXAS A&M UNIVERSITY

(COLLEGE OR DIVISION) (DEPARTMENT)

CO-SPONSOR OF PROGRAM (IF ANY): ____________________________________________
(PART OF TAMU SYSTEM OR PROFESSIONAL ORGANIZATION)

(COLLEGE OR DIVISION) (DEPARTMENT)

ACTIVITY DIRECTOR: (PREFIX) (NAME) (POSITION TITLE)

LENGTH OF PROGRAM: [HOURS]

ATTENDANCE: [ESTIMATED ATTENDANCE]

CONFERENCE FEE: __________________________________________________________

SOURCE AND AMOUNT OF FUNDS IF NO CONFERENCE FEE CHARGED:

(SOURCE) (AMOUNT)

APPROVED: _____________________________________________________________

ACTIVITY DIRECTOR DATE DEPARTMENT HEAD OR DIRECTOR DATE

DEAN DATE

IF CEUs ARE REQUESTED, SEE REVERSE
CONTINUING EDUCATION UNITS

1. **ATTACH ONE COPY OF PROGRAM OUTLINE AND/OR PROGRAM ANNOUNCEMENT.**

2. FACULTY MEMBER/PROFESSIONAL STAFF RESPONSIBLE FOR QUALITY OF COURSE CONTENT:

3. INSTRUCTIONAL PERSONNEL: ☐ TAMU FACULTY ☐ OTHER

<table>
<thead>
<tr>
<th>Name</th>
<th>Title</th>
<th>University</th>
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</table>

4. HOW WAS NEED FOR COURSE DETERMINED?

   ____________________________________________

5. EDUCATIONAL OBJECTIVES OF PROGRAM:

   ____________________________________________
   ____________________________________________
   ____________________________________________

6. PROCEDURE FOR EVALUATING PROGRAM BY STAFF AND/OR PARTICIPANTS:

   ____________________________________________
   ____________________________________________
   ____________________________________________

7. PROCEDURE FOR EVALUATING PERFORMANCE OF PARTICIPANTS:

   ____________________________________________
   ____________________________________________
   ____________________________________________

**APPROVAL RECOMMENDED:**  PROGRAM APPROVED FOR _______ CEUs:

<table>
<thead>
<tr>
<th>FACULTY MEMBER</th>
<th>DATE</th>
<th>DEAN</th>
<th>DATE</th>
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</table>

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Step 10: Evaluate the Course

Instructions

On the final day of the class, distribute a course evaluation to the participants. The instructor or staff coordinator should collect completed evaluation forms.

Summary

Course evaluations should be compiled and distributed to all participating professors, instructors, and guest lecturers. Based on this feedback, the professor should make appropriate course revisions to improve the course.

Form

See the sample Course Evaluation at the end of this section.
COURSE EVALUATION

PROGRAM TITLE

DATE ___________________ Location ___________________

1. Please check to what extent you agree or disagree with the following statements about this program:

<table>
<thead>
<tr>
<th>Statement</th>
<th>Strongly agree</th>
<th>Agree</th>
<th>Disagree</th>
<th>Strongly Disagree</th>
</tr>
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<tbody>
<tr>
<td>a. Control of program agreed with description in the printed brochure.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>b. Subject matter was adequately covered.</td>
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</tr>
<tr>
<td>c. Content presented was suitable for my background and experience.</td>
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<tr>
<td>d. Program was well placed within allotted time.</td>
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<tr>
<td>e. Handouts were relevant.</td>
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<tr>
<td>f. Participants were encouraged by speakers to take an active part.</td>
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</table>

2. To what extent will you apply the content and materials presented? (Check all that apply)

___ Will use them frequently
___ May be somewhat useful
___ May be useful later
___ Do not see any application
___ Do not know

3. Did the program meet your individual objectives?

Completely  | Yes  | No
--- | --- | ---
To some extent  | Yes  | No
Not at all  | Yes  | No
Had no individual objectives  | Yes  | No

4. Please rate the overall program by circle the appropriate number:

5 = Excellent
4 = Good
3 = Average
2 = Fair
1 = Poor

5. What other subjects would you want covered in a similar program?

6. What subjects included in the program should be omitted in future sessions?

---

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7. What subjects in the program should be given MORE time?

8. What subjects in the program should be given LESS time?

9. How did you learn about this program? (Check all that apply)
   - Brochure
   - Journal (name)
   - Newspaper (name)
   - Colleague
   - Other

10. Please rate the following facilities, if applicable.

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<th>Excellent</th>
<th>Good</th>
<th>Fair</th>
<th>Poor</th>
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<tr>
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<td>Other</td>
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11. Please LIST and RATE the speakers at this program by circling the appropriate number.
   5 = Excellent    3 = Average    1 = Poor

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12. Please LIST and RATE the program sections by circling the appropriate number (if applicable)
   5 = Excellent    3 = Average    1 = Poor

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THANK YOU FOR YOUR TIME TO COMPLETE THIS EVALUATION!
Step 11: Distribute the CEU Certificates

Instructions

Each participant should fill out a CEU request form (example at the end of this section). After collecting these forms from each participant, please forward to Dawna Rosenkranz. Dawna will then prepare CEU certificates for each participant. It is the department/center responsibility to mail the certificates to the attendees. There is no charge for the processing of the certificates.

The lead professor and the continuing education coordinator sign the CEU certificates.

Records

Texas A&M*Engineering maintains records of

* All courses and their CEU’s
* Each students’ CEUs earned and the courses attended

A sample CEU certificate is at the end of this section.
TEXAS A&M★ENGINEERING
Texas Engineering Experiment Station
Texas A&M University System

Continuing Education Units (CEU)
Professional Development Hours (PDH)
Request Form

NAME OF CONFERENCE/WORKSHOP/SYMPOSIUM

DATE(S)
LOCATION OF MEETING (HOTEL, ETC.)
CITY, STATE

CHECK EACH MEETING YOU ATTENDED:  *EXAMPLES BELOW*

_____ Symposium – Day 1 – Date (.6 CEUs/6 PDHs)
_____ Symposium – Day 2 – Date (.9 CEUs/9 PDHs)
_____ Name of Workshop – Date (.8 CEUs/8 PDHs)

PLEASE PRINT PARTICIPANT NAME AS IT WILL APPEAR ON THE CERTIFICATE:
First Name_____________________________  Last Name__________________________________

Address where CEU certificate is to be mailed:
Company (if applicable)______________________________________________________________
Address___________________________________________________________________________
City/State/Zip______________________________________________________________________
Telephone_____________________________________  Fax________________________________

Return to Name of Person Collecting the Certificates, Department, Texas A&M University,
**** TAMU, College Station, Texas 77843.**** Phone (979) ***.**** Fax (979) ***.****
Step 12: Send Thank-You Letters

**Instructions**

Following the course, the instructor/staff coordinator should send thank-you letters to all participants and instructors. The letters should be printed on your departmental stationery. Participants who had had a positive experience in your course will recommend the course to others within their organization.

**Offer of Support**

In the thank-you letter, the instructor/staff coordinator will suggest that participants contact the lecturers/instructors for assistance if they have trouble applying what they have learned in the course.

**Sample Thank-You Letter**

See the sample Thank-You Letter at the end of this section.
Sample Thank You Letter

Date

Name of Participant
Company Name
Mailing Address 1
Mailing Address 2
City, State, Zip

Dear Name of Participant,

Thank you for your participation in our recent Short Course Title/Program short course. I would like to take a moment to commend you for your endurance since this was an intense course, and by the last day I know you were ready to return home. Should you experience difficulty trying to apply a specific aspect of the course material, feel free to call one of the instructors, and they will be happy to assist you.

This course, as well as others coordinated by my office, can be offered as an on-site customized presentation. If your company would like further information concerning our site programs, please feel free to contact me. We will maintain a record of your continuing education units earned in our database. Additionally, we will keep your name and address in a separate database (unless request otherwise) for future course notifications.

I hope your visit to College Station, Texas was an enjoyable one. It was a pleasure to have you as a participant in the course.

Sincerely,

Your Name
Your Title
Step 13: Turn in Travel Materials for Reimbursement

**Instructions**

If the course takes place outside the Bryan/College Station area, faculty must turn in the Travel and Leave Form to their department.

Additionally, turn in all travel information and receipts for travel and expenses to your departmental fiscal administrator.

**Texas A&M University System Faculty**

If the course is not held on the main Texas A&M University campus and the faculty member needs to travel to a destination outside the Bryan/College Station area, all TEES travel guidelines apply.

An original Travel and Leave Form must be filed with the department prior to traveling. It is the responsibility of the department to complete all reimbursement/purchase vouchers directly related to the continuing education activity.

To receive travel reimbursements, faculty must submit full travel expense information. The appropriate vouchers are prepared based on the travel information provided by the faculty member. The vouchers are sent to the faculty member for signature.

For specific reimbursement information, contact your Academic Business Administrator or the TEES Fiscal Office.

**Guest Lecturers**

Guest lecturers must have prior approval on all travel arrangements to ensure that all required guidelines are followed.

To receive travel reimbursements, guest lecturers must submit full travel expense information. Original receipts for all reimbursements (i.e., airfare, hotel, car rental, taxis, and meals) are also required.
**Glossary**

**Professional Development Activity**

At Texas A&M University, a *professional development activity*, normally *postbaccalaureate*, is any nonacademic credit, elective educational activity that is sponsored or cosponsored by a component of the university. This type of program may include university personnel as well as industry professionals.

**Criteria**

A professional development activity meets these minimum criteria:

- The activity is a planned educational experience of a professional development nature.
- The activity is sponsored by an academic college, department, or administrative unit of the Texas A&M University System qualified to affect the quality of the content and to select an approve resource personnel.
- A record of attendance is required for institutional reporting use. The sponsor of the activity maintains a file of program materials.

**Excluded programs**

The following programs are not considered professional development activities:

- A program designated as required in-service education for Texas A&M University faculty or staff.
- A program conducted for the purpose of informing non-university personnel about the activities and capabilities of the university.

**Open Enrollment**

An *open enrollment* course is developed for professionals in the field. Individuals or companies pay registration fees for each participant.

**Sponsored Course**

A sponsored course is developed at the request of a company for in-house training of its employees. The audience is predetermined. The Office of Sponsored Research sends a letter of proposal to the prospective company, with an outline and the total cost of the course. If the company agrees to the terms of the letter, both parties sign a Memorandum of Agreement prior to the course. The Office of Sponsored Research will assign a project number to activate the project.
Hosted Activity

Sponsorship of a professional development activity may be shared by one or more units of the university and one or more professional organizations. An activity conducted under such co-sponsorship is classified as a hosted activity.

A hosted professional development activity must show evidence of planning and participation by the hosting unit of the university and must be educationally sound and justified as such in its statement of purpose and objectives.

Conference

A conference is a general type of meeting, usually of one or more days’ duration, having a central theme but loosely structured to cover a wide range of topics.

Short Course

A short course is a sequential offering, under a single or multiple instructors, meeting on a regular basis for a stipulated number of class sessions over a short period of time.

Seminar

A seminar is a small grouping of people with the primary emphasis on discussion under a leader or resource person(s). It is likely to be a one-time offering although it may continue for several days.

Workshop

A workshop usually meets for a continued period of time of one or more days, combining instruction with laboratory or experimental activity for the participants, with emphasis on skill training.

Special Training Program

A special training program is a skill program that offers a combination of instruction and practice. The approach is usually on a more individual basis than a workshop.

Institute

An institute is similar to a conference but is more tightly structured to provide a more systematic development of its theme. Emphasis is on providing instruction in principles and techniques, rather than on general information.

Symposium

A symposium is a meeting, presided over by a chairman, where each speaker delivers a formal or prepared talk on the assigned subject matter.
References
