

Education



Chapter Leadership Handbook

2006 | Stock #01018



Advancing Productivity, Innovation, and Competitive Success

EDUCATION

CHAPTER LEADERSHIP HANDBOOK

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APICS The Association for Operations Management
5301 Shawnee Road
Alexandria, VA 22312-2317

Stock # 01018 January 2006



Our sincere thanks to William M. Grauf, CFPIM, for his contributions to the preparation of both the original Chapter Program and Seminar C-manual as well as the newly revised Education Chapter Leadership Handbook.

Special thanks to Chuck Nelson, CFPIM, Karl Kapp, CFPIM, Harvey McChesney, CFPIM, CIRM, Kenning A. McFee, CPIM, David T. Jankowski, CFPIM, and the Colorado, Fox River, Grand Rapids, and North Texas Chapters for their invaluable contributions to the content of these manuals.

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I. Education Programming Objectives

The Mission of APICS:

APICS is the global leader and premier provider of information and services in production and inventory management and related areas to enable members, enterprises, and individuals to add value to their business performance.

The chapter is the primary channel through which APICS provides education. The objective of this manual is to assist the chapter by providing guidelines, templates, sample procedures and a collection of ideas that chapters can use to develop and fine-tune their professional development programs. Whether your chapter is trying to determine what type of new program it should initiate or attempting to revitalize the programs you already have, it is worthwhile to start with what you want to accomplish.

Strategic Objectives

The chapter's strategic objectives should be identified through either a form of strategic planning, marketing/membership survey or some other means. A chapter is likely to select two or three of the resulting objectives/activities to pursue in a year.

Possible Objectives:

- Professional development meetings (PDMs) can serve as an excellent format to bring in new prospective members for the first time. They also provide an opportunity to get to know attendees, find out what they are interested in and even get them involved in the organization.
- PDMs are the best way to provide networking opportunities to members and non-members.
- Education and seminars can generate considerable revenue and provide the value your members are looking for, but consideration must be given to minimizing risks.
- PDMs can be used to provide fundamental education, which may also serve to attract new prospective members and support area companies.
- Supporting members' certification goals is a common objective that can also reap other benefits as well, such as revenue generation.
- Supporting area companies and their specific requirements can be beneficial but must be handled carefully to ensure the chapter does not establish an over reliance on one company. In-house courses can work well for the chapter, especially when individuals from other companies attend. Such courses can significantly reduce chapter facility expenses.
- PDMs or seminars can provide life after certification by offering various advanced topics.

Note that to accomplish the above objectives, a chapter may need to set an objective to recruit and train a pool of qualified instructors.

Prioritize objectives based on:

- Importance to strategy
- Resources required
- Required sequence or dependency

Why Provide Educational Programming?

One section of a 1995 APICS survey of chapter education directors requested general information about chapters' educational programming. Respondents to the survey were asked why their chapters provided education. Responses are illustrated in the following tables.

LEGEND: **NI = Not at all important**
SI = Slightly important
MI = Moderately Important
VI = Very Important
DK = Don't Know

	Overall Endorsement Rate (# of chapters)				
	<i>NI</i>	<i>SI</i>	<i>MI</i>	<i>VI</i>	<i>DK</i>
To increase the job skills of chapter members	-	1.4 % (2)	9.6% (14)	89.0%	-
To raise revenue for the chapter ¹					
To help members become CPIM/CIRM certified	-	7% (1)	14.4% (21)	84.9% (124)	-
To provide service/education to local manufacturing/distribution community.	1.4% (2)	3.5% (5)	27.5% (39)	67.6% (96)	-

¹ Responses for some items, such as this one, differed significantly by chapter size. It is inappropriate to directly interpret the overall results because of the relationship between chapter size and response rates. The differences in responses by chapters of different sizes must be considered when examining these items. Therefore, results for these items are reported in separate tables. Overall response rates are reported for these items in addition to response rate by chapter size.

To Raise revenue for the chapter	Endorsement Rate (# of chapters)				
	<i>NI</i>	<i>SI</i>	<i>MI</i>	<i>VI</i>	<i>DK</i>
Overall ¹	10.4% (15)	25% (36)	34.7% (50)	29.9% (43)	-
Small ² (<100 members)	10.6% (5)	38.3% (18)	34.9% (16)	17% (8)	
Medium (100-500 members)	10.3% (9)	20.5% (16)	32.1% (26)	37.2% (29)	-
Large (>500 members)	5.9% (1)	11.8% (2)	47.1% (8)	35.5% (6)	-

¹ Responses for this item differed significantly by chapter size. It is inappropriate to directly interpret the overall results because of the relationship between chapter size and response rates. The difference in responses by chapters of different sizes must be considered when examining these items.

² Since one respondent could not be classified as to chapter size, the sum of the small, medium and large respondents may not equal the overall number of respondents for each item. This difference must be considered when examining the statistical analyses reported here.

If a Chapter is to remain solvent, its education program must be financially successful. The chapter's board of directors must look at the following before approving any program:

- The degree to which the program will likely achieve the desired objective(s)
- Up front expenditures
- Risk exposure
- Breakeven point and the probability of passing it
- Reasonability of the budget
- Potential surplus

The chapter must look for ways in which any expenses can be minimized until after the break even point has been achieved. At that point, the chapter can go forward with the event knowing at least the expenses can be recovered.

II. Education

This section will review the fundamental requirements of a solid chapter education program and elaborate on a number of fine points that could help the chapters take advantage of specific situations or excel in certain areas. You will understand how to organize your chapter's volunteers, recruit and train instructors, select a format that fits your requirements, set a pricing structure that satisfies the chapter's objectives, utilize the materials to your and your students, best advantage, and evaluate the programs effectiveness.

Organization

The organization of education programs must be structured so as to share the workload among several volunteers, to keep accountability and to maintain a high level of quality.

The **board of directors** should:

- Determine broad policy issues
- Detail the objectives of the program
- Define the scope of the education program
- Approve the annual budget

The **vice-president of education** must ultimately be responsible for:

- Long-range planning
- Selecting and scheduling time at the teaching facility
- Scheduling use of the audio visual equipment
- Preparing the course brochure or other marketing material and ensuring that it is mailed on time
- Coordinating day-to-day activities or the registration process
- Finding substitute instructors as required
- Ensuring that bills are reviewed for accuracy and that both bills and instructor fees are paid on a timely basis
- Preparing budgets and status reports (for the Board)
- Arranging partnerships and co-sponsorship of events with other organizations such as schools, vendors/exhibitors and local companies
- Recruiting and managing instructors and other volunteers

Volunteers should be used to make arrangements, coordinate details and provide ideas. Large chapters may find it prudent to delegate responsibility for portions of the education program to committees, but the board of directors must approve major policy changes.

Procedures for reporting progress and results as well as providing an opportunity for review and approval of new ideas must be firmly established.

Management reporting and review is critical as education programs can provide instructors with income and substantial opportunities to advance their careers, especially if they are consultants. Reasonable policies and procedures will minimize the risk of any one person receiving undue advantage, at the expense of the chapter or its customers.

If there are enough volunteers to create an education committee that reports to the board of directors, this may be desirable so that the board is not encumbered with all of the detailed planning required to make an education program successful. If this is the case, the vice-president of education will usually be a member of the board and should make a monthly report that summarizes plans for new programs and results from recent programs. The education committee would meet separately on an as-needed basis to coordinate the program and recommend new or revised policies and procedures. The board is ultimately responsible, so it should approve the policies and monitor the progress of the programs.

If there is only one person managing the education program, then there is less need for detailed procedures, but some policy guidelines are appropriate.

Formats

There are several types or formats that may be used to deliver education. The format that is used should depend on the chapter's objectives and on input from the member/customer.

Evening classes are often taught for 6-11 weeks, one night a week. This weekly format comfortably fits most of the certification review courses. The classes are taught by one or two instructors for five to 30 students. Any more or less makes discussion difficult, though still possible. The course material is ordered ahead of time so that each student has a Student Guide the first day of class. An alternative is to clearly state that students must order their own Student Guide and other books. Instructors should have their materials well ahead of time so they may be adequately prepared. This format allows time for students to do some amount of reading or exercises/problems for homework. Homework however should be kept to a minimum, because many students will not touch the book after they leave class. For the student who wants to take full advantage of the learning opportunity this format could be very beneficial.

Several chapters have developed a package deal that can effectively meet several objectives. According to the 1995 APICS Chapter Educational Programming Questionnaire report, seventy percent (70%) of the responding chapters occasionally, regularly use, or use most often a three-hour session format.

The **2-3 Day Seminar** format also works well for the certification review courses. These are usually held on a Friday & Saturday, Saturday & Sunday or Friday - Sunday. While similar to evening classes in content and requirements, the format is attractive in spread-out chapters as students can drive in for the weekend. These are also attractive to people who must travel for their job and are thus unable to make most evening activities. For these reasons, this type of class will attract some people the chapter has never seen.

Special One-Day Seminars are good for special topics. Typically this starts with several people asking for a specific topic or a well-known consultant/educator offering to do a seminar. Topics will vary, but care must be given that the topic has broad appeal and is not of interest to just a few vocal members.

Multi-day Seminars with a variety of topics and exhibitors are typically better for large chapters or a group of chapters.

Tutorials can work in a wide variety of situations. Such situations can be anything from a small group studying together to a knowledgeable person leading others in a discussion group that is incorporating some amount of self-study. Tutorials are an ideal solution when the chapter does not have an instructor who is ready to teach a class yet, but is willing to facilitate discussion among a number of students who are expected to complete a fair amount of reading and problems/exercises on their own. If many of the students are remote, the group may want to meet only occasionally and participate in discussions via e-mail between classes. Of course, these formats can work in any combination as well. Seminars will be discussed in more detail in that section of this manual.

Seminar Comparisons

The following table provides a brief comparison of different types of education formats. Please look in the appropriate section of this manual for a more detailed discussion of the individual issues.

Issues to Consider	2-3 Day Seminar or Class	Evenings	Tutorial
Marketing	<ul style="list-style-type: none"> • Broader mailing list. • Announce at Region Meeting. • Announce in APICS magazine 	<ul style="list-style-type: none"> • Send to membership and customer base. 	<ul style="list-style-type: none"> • Announce in chapter newsletter and on Web site.
Facility	<ul style="list-style-type: none"> • At or near a hotel. 	<ul style="list-style-type: none"> • Community college or a local company. 	<ul style="list-style-type: none"> • Where ever the group can meet. • Discussions may also be done partially via e-mail.
Equipment	<ul style="list-style-type: none"> • Standard 	<ul style="list-style-type: none"> • Standard 	<ul style="list-style-type: none"> • None
Food	<ul style="list-style-type: none"> • Coffee and rolls in the morning and lunch. 	<ul style="list-style-type: none"> • Possibly refreshments at break. 	<ul style="list-style-type: none"> • None
Registration	<ul style="list-style-type: none"> • Process defined in publicity section 	<ul style="list-style-type: none"> • Process defined in publicity section 	<ul style="list-style-type: none"> • Facilitator can handle.
Instructor	<ul style="list-style-type: none"> • May need time off work. • Chapter should consider using two or more instructors so they can “tag team” and keep energy high. 	<ul style="list-style-type: none"> • Assign homework to review. 	<ul style="list-style-type: none"> • Facilitator does not need to be as qualified as a typical instructor.
Prices charged by chapters	<ul style="list-style-type: none"> • Calculate full cost plus desired surplus. 	<ul style="list-style-type: none"> • Calculate full cost plus desired surplus. 	<ul style="list-style-type: none"> • Minimal, to cover facilitator and materials plus any surplus.
Advantages	<ul style="list-style-type: none"> • May attract customers from outside the chapter’s area. • May be able to attract exhibitors or sponsors to defray costs. 	<ul style="list-style-type: none"> • Easier on instructors. • Learning in smaller, more palatable doses. • Able to assign some homework and reading. 	<ul style="list-style-type: none"> • Minimal exposure. • Flexibility
Disadvantages	<ul style="list-style-type: none"> • Risk • Possibility for student burnout. • Finding instructors. 	<ul style="list-style-type: none"> • Difficult for remote or traveling customers. 	<ul style="list-style-type: none"> • Considerable self-study. • Many students will want more structure.

A popular variation of the evening class format is the **in-house classes** that are usually requested by a specific company for its personnel. According to the 1995 APICS Chapter Educational Programming Questionnaire Report, seventy percent (70%) of the responding chapters do some form of in-house training. It is sometimes possible to include members from other companies but this has to be negotiated with the requesting company. A challenge may be finding the instructors for this type of program since the company may want the classes to start earlier in the day. If this is the case, the chapter may want to contact its Region representative or APICS Headquarters to see if they can provide an instructor. It is imperative that a well qualified instructor leads the class so that the company truly experiences the value of education. A weak instructor could sour any possibility of the company continuing with APICS. If an outside instructor is used, the chapter could possibly have a newer, local instructor co-teach the class. This would allow the new instructor to gain valuable experience.

Much of the education will be oriented towards preparing students to take one of the Certification exams, but many will take the class without even considering the exam. All levels of APICS have debated the relative merits and differences between certification prep and pure education oriented programs. If the chapter has enough demand it is possible to plan programs that focus on each, but most chapters will need to carefully consider the approach they want to take. Whatever the decision, be sure to carefully publicize the intent of the class, so that the students' expectations are properly set.

Marketing Your Program

The purpose of this document is to provide an outline for selling education. Samples of marketing options are also available in the Appendix.

The following list offers some items to consider maximizing your marketing efforts and providing an outline for selling education.

1. What type of program will the chapter offer? Remember don't sell just what you can teach. The neighboring chapters, the Region and APICS all have instructors that could help. So a broad catalog that can be tailored to meet your customers' objectives will be more attractive.
2. Create a list of prospective companies that will be your first target. Don't spend too much time creating the list. It will change. Important thing is to get started.
3. Modify the *Sell Chapter Education Letter* in the Appendix, to fit your situation and the prospect. Each prospect should receive a personalized letter. Send a few letters at a time because it is critical to make a follow-up call to those prospects within a week or two.
4. Make the follow-up call a week after the letter is sent. Objective should be to schedule a visit when you can discuss specifically what a prospect might need.
5. Identify the solution. What are you going to propose? In some cases it is very simple and you can discuss it immediately with the prospect. In other cases it may require some thought and research. Be careful since prospects tend to remember what you have said. While misspeaking may be a simple error, it could cause you problems later on. This is where it may be beneficial to contact someone on Region staff. See list below of issues.

6. If the opportunity is passed to someone else it is still your responsibility to follow-up to make sure it is addressed in a timely and satisfactory manner. That will go a long way in creating a favorable long-term relationship.
7. Review the solution and the cost structure with the chapter's board of directors or follow the appropriate chapter procedure.
8. If possible seek some informal feedback from someone at the prospect company to make sure you are on track.

Issues

- ❑ Will a standard APICS course satisfy the prospect's objectives?
- ❑ If not, could one or more standard courses be tailored to fit the bill? Tailoring means that an instructor can teach just some of the topics in a standard course. This is in contrast to customizing a course. Customizing means someone has to create additional content or in some fashion work with existing content to substantially change it which usually requires extra time and should be charged for at an hourly rate. A frequent request is to have the instructor incorporate examples specific to the prospective company's into the course. It is best to ask the instructor to estimate what will be involved and provide an estimate of the time and expense.
- ❑ Does the prospect need a course taught in a special media to reach a geographically dispersed audience? This is feasible but asks for advice from the Region staff.
- ❑ If you don't have an instructor, check with neighboring chapters, Region staff or APICS Headquarters.

A Valuable Marketing Opportunity

As any APICS member will tell you, *APICS* magazine is our organization's award-winning flagship publication, featuring innovative ideas and real-world strategies for inventory, materials, production, and supply chain management; planning and scheduling; purchasing; logistics; and warehousing. What many APICS chapter **officers** might not realize, however, is that the magazine offers **free promotion of chapter seminars** in every issue. Within the APICS Report section of the magazine, chapters can publicize upcoming events simply by submitting the necessary information to *APICS* magazine's Senior Editor.

Don't miss this valuable marketing opportunity! Submit your announcements to editorial@apicshq.org with the following information included (incomplete announcements may not enjoy the benefits of timely publication):

- sponsoring chapter name
- event name
- program date
- location (including venue; city and state; and, if relevant, province)
- any keynoters or presenters
- a URL to visit or a person to contact to register and receive more information
- a contact name with phone or e-mail address (for any questions from the editor).

Please keep in mind: Magazine production is a lengthy and involved process. The sooner announcements are received, the better—and two- to three-months prior to publication is preferred. If you have any questions, please contact editorial@apicshq.org.

Use of E-mail for Marketing

- ❑ Set up an e-mail list of company coordinators or other people that have expressed interest in receiving education updates.
- ❑ Start a sign-up list for people wanting to take a course. Once a certain number have indicated interest, schedule the course and send an e-mail to them and other interested parties.

Linking Education Program to Certification Exams

Your chapter could purchase certification exam vouchers from APICS and roll the cost into the price of the course. Some chapters even schedule the exam dates for all of the students. If the testing center is not local some chapters provide transportation. Classes should be scheduled to end a week before the exam date. This approach combats two of the primary reasons why students may not actually take the exams:

1. Procrastination
2. Lack of a social support group

If your chapter does not have an exam site that is accessible to the membership, then the chapter should contact APICS Headquarters to investigate options to either add an exam site or use an existing facility such as a computer lab at a nearby community college or some other location.

Recruiting Instructors

Since education is the mission of APICS, instructors are the primary tools to help us fulfill that mission. Instructors are the most important element of any education program. A good instructor can somewhat compensate for weaknesses in any other aspect of the program. Our problem is that most chapters cannot find enough instructors to teach all the classes that could be offered. There are several reasons for this shortage:

- We often try to recruit only people who already know how to teach.
- We do not ask enough people to consider teaching.
- Candidates do not recognize all the potential benefits.
- People are too busy today for others.

If recruiting is difficult, what methods are being used and how can we improve on them?

The following statistics were taken from the 1995 study of chapter education programs.

How does your chapter recruit new instructors?	Percentage Using
Letter to recently certified individuals	19.3%
Newsletter notices	47.4%
Word of mouth	94.1%
Advertisement at local university/college	7.4%
Use of APICS' qualified instructor list	25.9%
Other	23.0%

Recruiting and training instructors requires a concerted effort, but if well planned, can reap excellent results. The following approach will pay off big dividends and is sustainable.

1. Identify the benefits of being an instructor for the chapter.
2. Create a mentoring program in which an experienced instructor takes a new instructor under his or her wing for a few classes.
3. Create a chapter policy on instructors and instructor qualifications. This should include an ethics statement.
4. Create a procedure to measure the instructor's performance and recognize their achievements. Be sure to include a procedure for identifying and correcting problems or areas of weakness. (See the evaluation in the Appendix.)
5. Work with your Region Staff to develop a schedule of Train the Trainer and Learning Dynamics classes.
6. Create a plan that incorporates the above programs.

7. Communicate the plan and the benefits to other instructors as well as to everyone on the board so they can all look out for and recruit new candidates.
8. Monitor the program and make adjustments.

The above list is detailed further in the following paragraphs.

Identify the Benefits of being an Instructor

Include such benefits as improved skills for their professional career, re-enforcement of their understanding of the APICS body of knowledge, development of a sizeable network, and the satisfaction of helping other professionals learn and grow. Combining these benefits can make a substantial impact on a person’s career.

While these benefits can be significant, the chapter may want to consider other means of compensation or ways to express appreciation. According to the 1995 study of chapter education programs 83% of the chapters compensate their instructors. The following chart is based on the same study.

	Response by Chapter Size				
	Hourly Rate	Overall	Small	Medium	Large
If your chapter pays instructors, on average, what is the hourly rate paid to instructors.	\$4.00 – 15.00	15.6%	27.3%	12.5%	11.1%
	\$16.00 – 30.00	30.2%	36.4%	32.1%	16.7%
	\$31.00 – 45.00	22%	9.1%	26.8%	22.2%
	\$46.00 – 60.00	26%	27.3%	23.2%	33.3%
	\$61.00 – More	6.3%	-	5.4%	16.7%

Other chapters have decided to not compensate instructors but show appreciation by paying for an instructor to attend the annual conference or another type of special outing. No one approach is right, but it depends on the chapter’s strategic plan and how the board wants to operate.

Create a Mentoring Program

In a mentoring program, an experienced instructor takes a new instructor under his or her wing for a few classes letting them teach an increasingly larger portion of the course and providing constructive feedback periodically. The mentor can answer questions, act as a coach or discuss teaching approaches as requested on an ongoing basis. They should also inform new instructors of the Instructor’s Electronic Discussion List and Helpline and how to use them.

For further information on mentoring, see the Appendix on page 20.

Create a Chapter Policy on Instructors and Instructor Qualifications.

The policy will be very useful in making decisions about how to handle a myriad of decisions. Below is a sample policy, but the board will want to carefully determine its own values.

Sample of Instructor Responsibilities

- Must conduct each course in a professional manner, bring new ideas to the class, and be motivated to provide a quality learning experience.
- Must spend adequate time preparing for each class.
- Must never use the class as a forum for selling one's own products, services, etc.
- Must follow the Chapter's policies and procedures.
- Must ensure that the regulations of the facility (i.e., no smoking or eating in designated areas) will be followed by all members of the class.
- Must have the students complete the evaluation forms and forward them to the chapter's vice president of education.
- Must ensure that the classroom is left in the same condition as found.
- Must use approved materials.

The following is a sample of an Instructors' Ethics Statement:

As an instructor for the _____ Chapter I will:

- Represent APICS and the Chapter in a professional manner
- Be responsible to the students to provide high quality education
- Teach the body of knowledge, not the exam
- Spend adequate time preparing for each class
- Follow the policies and procedures of APICS and the chapter
- Have students fill out course evaluation forms at the end of the course and forward them to the chapter's vice-president

The qualifications listed below are recommended guidelines. Chapters should always follow a strategy that best suits the needs of their members.

These represent the APICS' best practices, as a number of their chapters have been asked for their input. These should all be upgraded as improvements are identified. The Chapter Awards Program will be modified to incorporate these guidelines. The program is voluntary and chapters may exceed the standards if desired.

Recommended Instructor Qualifications

1. Has signed the chapter's Instructor Ethics Statement.
2. Is recently certified in the applicable program and/or exam.
3. Maintains an average score of 4.0 or better on evaluations.
4. Has attended Train the Trainer.
5. Has taken Learning Dynamics (May be optional or merely a promise to do so within 12 months.).
6. Has 50 hours of adult education experience. (20 hours in the last 12 months).
7. Has five years of experience in a relevant field.
8. Has a college degree is optional.

Create a Procedure to Measure Performance and Recognize Achievements.

Be sure to include a procedure is for identifying and correcting problems or areas of weakness. When a particular class or instructor scores poorly, there should be a procedure in place that details corrective action. Trends must be identified and dealt with.

Recognize that an evaluation form at the end of a class is probably the least effective, but easiest way to measure training performance. It can provide a view of how the student perceived the class and, as such, it is a quick gauge of any problems. It is also wise to have the instructor fill out a different class evaluation form at the end of the class as the instructor will have insights and ideas for improvement. Together these evaluations can provide reasonable insights into the class.

Problems revealed by evaluations and ways to handle them include:

Problem in Evaluations	Possible Causes	Corrective Actions
Large difference in scores between instructor and materials.	Instructor may have complained about the material or not used it correctly.	Speak with the instructor.
Low ratings and/or comments about errors in the materials.	There are some errors even though APICS is trying to identify and correct them, prior to general release.	Put a message on the instructors' electronic discussion list and ask if others have experienced the problem and how they dealt with it. Contact APICS Headquarters about the error so they may be corrected. If no fix is available for the next time you teach the class, identify a workaround.
Low scores on meeting course objectives.	The marketing material for the program may have set the wrong expectations. The course may not have been taught correctly.	Examine the marketing material and make sure it is in line with the course. Monitor that course.
Large difference between the ratings given by the instructor and the students.	The instructor can often work around certain problems so they are not readily apparent to the student, but the student does have concerns and blames the instructor.	Identify and correct the problem.

To determine the class's true effectiveness, follow-up interviews with the students and their managers are desirable. One advantage is the potential for excellent feedback that could help to improve the program. Additionally, the interviews could uncover success stories that would help chapter and national marketing efforts.

Work with Region Staff Schedule Instructor Training

Formal training such as Train the Trainer and Learning Dynamics will provide new or prospective instructors with a number of techniques, an opportunity to practice in a “safe environment” and see themselves on video, and a chance to identify any bad habits. Many instructors will want to re-take these courses periodically to sharpen their skills.

Create a plan that incorporates the above programs. Pulling all of this material together will take time but it will pay off as it will allow programs to be run more efficiently and effectively. New instructors will be able to be recruited and brought up to speed more quickly. Less volunteer time will be required to manage the process on an ongoing basis.

Communicate the plan and its benefits to other instructors as well as to everyone on the board so they can watch for and recruit new candidates. We all see people that have the potential and/or the desire to teach. The ideal candidate has both, but many of the best instructors in APICS had to overcome a serious challenge to become a successful instructor. We can provide the training and support to help prospects help themselves. They will often believe it is not possible or that the requirements are too stringent.

Be sure to communicate the responsibilities and time required of an instructor. A good rule of thumb is that the first time a class is taught the instructor should plan on 12 hours of preparation for every hour of class time. This prep time should not be minimized, as that will have a direct impact on the instructor’s effectiveness and the perceived quality of the course. This assumes that the instructor already knows the subject matter but must spend the prep time to become comfortable with the course material. Follow-up classes will take 3 – 4 hours of prep time for every hour of class time. Much of this depends on the level of familiarity with the subject, the material and the degree to which it must be tailored in order to meet the course objectives.

Monitor the Program and Make Adjustments.

Follow your measurement plan religiously and the instructors will take it very seriously. Some light competition among the instructors for the best ratings can be healthy for the program.

Teaching Resources

Training Improvement:

Creating Training Miracles, By Alastair Rylatt and Kevin Lohan

Practical and comprehensive guide for training professionals. Contains guidelines and techniques that improve the quality of discovery and learning in a variety of settings, including the formal classroom, the workplace, and the community at large.

Technical Presentation Skills: A Practical Guide for Better Speaking, Steve Mandel

A clear, down-to-earth explanation of how to plan presentations, organize material logically, design and use visual aids, and present material.

Instant Trainer: Quick Tips on How to Teach Others What You Know, C. Leslie Charles and Chris Clarke-Epstein

New instructors or in-house experts who are invited to share their knowledge will benefit from this guide. It also teaches how to make presentations interactive by encouraging audience participation, creating effective support materials, and using today’s technology to deliver the facts.

Interactive Training Activities:

Games Trainers Play, John W. Newstrom and Edward E. Scannell

Contains cost-effective games, activities, and exercises. This comprehensive sourcebook contains more than 100 experiential learning exercises, including games to develop leadership ability and build self-confidence, brainteasers to enhance problem-solving skills and boost creativity, and icebreakers designed to grab and hold a group's attention.

How to Give a Terrific Presentation, Karen Kalish

Outlines useful and innovative tips on effective delivery. In an easy-to-understand format, using helpful figures and self-tests, the book provides guidance and ideas for presentation pizzazz.

More Team Games for Trainers, Carolyn Nilson

Consists of 100 training games. This book addresses the training needs of long-standing teams as well as teams that are just forming.

100 Training Games, Gary Kroehnert

Contains games suitable for developing abilities in communication, teamwork, perception skills, and other business-related topics. Each game is self-contained, providing learning objectives, instructions, a list of required materials, discussion points, and space for personal notes.

Available APICS Courseware for Instructors

Train the Trainer

This course prepares professionals to teach adult training and development courses. The program contains eight lessons to provide potential instructors with a successful and workable methodology that can be applied in teaching any subject. The lessons cover such topics as communication, effective media use, motivating learners, and meeting room layout. Computer-based presentation skills using presentation software and computers linked to projectors are also covered.

The instructor kit contains a student workbook and instructor notes with lesson answers. In addition, the course includes an introductory section to help the instructor prepare for and follow up on the workshop, an appendix of student handouts, and an appendix of overhead masters.

Learning Dynamics for Instructors

This is the next class after *Train the Trainer*. This class examines the dynamics of the classroom and describes techniques for managing these dynamics to maximize learning. Designed for a workshop setting, this 10-session course is of specific interest to experienced trainers and educators. Workshop participants will gain a better understanding of adult learning principles and learning styles, in addition to discovering how to select appropriate training methods, improve questioning skills, use feedback, and handle challenging situations.

Workshop participants are involved in several interactive experiences throughout the two-day workshop. In addition, two profile instruments are integrated into the course to provide participants with insight into adult learning styles and interpersonal behaviors.

Web Resources

Web site of the American Society of Training and Development – <http://www.astd.org>

- Contains information about what is happening in the training industry and has an on-line catalog of trainer resources.

Web site of TRAINING Magazine - <http://www.trainingsupersite.com>

- Contains a variety of information about training and training approaches

Pricing

This can be a philosophical issue for chapters and must be carefully considered by the Board, but it also will determine many other aspects of the Chapter’s educational program. Many chapters provide a discount for members and or registering early.

		Endorsement Rate by Chapter Size ¹ (# of chapters)			
		Overall ²	Small (<100 members)	Medium (100-500 members)	Large (>500 members)
What does your chapter charge members for a CPIM Certification review course	\$ 0-50	7.3% (10)	10.5% (4)	6.2% (5)	5.3% (1)
	\$ 51-100	27.7% (38)	39.5% (15)	27.5% (22)	5.3% (1)
	\$101 - 150	24.1% (33)	18.4% (7)	27.5% (22)	21.2% (4)
	\$151-200	23.4% (32)	15.8% (6)	27.5% (22)	21.2% (4)
	More than \$200	17.5% (24)	15.8% (6)	11.3% (9)	47.4% (9)

Endorsement Rate by Chapter Size (# of chapters)				
Does this price include student guide or reference materials? (For CPIM course)			Yes	No
	Overall ²		78.2% (108)	21.7% (30)
	Small (<100 members)		86.8% (33)	13.2% (5)
	Medium (100-500 members)		70.7% (58)	29.3% (24)
	Large (>500 members)		94.5% (17)	5.5% (1)

¹ One respondent could not be classified as to chapter size. Therefore, the sum of the small, medium and large respondents is not equal to the overall number of respondents.

² Responses for this item differed significantly by chapter size. It is inappropriate to directly interpret the overall results because of the relationship between chapter size and response rates. The differences in response rates by chapters of different sizes must be considered when examining these items.

This may also have a sizeable impact on the Chapter's finances as evidenced by:

		Endorsement Rate by Chapter Size ¹ (# of chapters)			
		Overall ²	Small (<100 members)	Medium (100-500 members)	Large (>500 members)
Approximately what percentage of total chapter revenue comes from paid course registration	1-10%	42.3% (60)	71.1% (32)	29.5% (23)	26.3% (5)
	11-20%	7% (10)	2.2% (1)	11.5% (9)	-
	21-30%	7% (10)	2.2% (1)	9% (7)	10.5% (2)
	31-40%	3.5% (5)	2.2% (1)	5.1% (4)	-
	41-50%	12.7% (18)	8.9% (4)	14.1% (11)	15.8% (3)
	51-60%	4.9% (7)	4.4% (2)	5.1% (4)	5.3% (1)
	61-70%	3.5% (5)	2.2% (1)	3.8% (3)	5.3% (1)
	71-80%	7.7% (11)	4.4% (2)	9% (7)	10.5% (2)
	81-90%	9.1% (13)	2.2% (1)	9% (7)	26.3% (5)
	91-100%	2.1% (3)	-	3.8% (3)	-

¹ One respondent could not be classified as to chapter size. Therefore, the sum of the small, medium and large respondents is not equal to the overall number of respondents.

² Responses for this item differed significantly by chapter size. It is inappropriate to directly interpret the overall results because of the relationship between chapter size and response rates. The differences in response rates by chapters of different sizes must be considered when examining these items.

Education Materials

Good materials can often make up for a mediocre instructor, so unless the instructor is well seasoned, the chapter should be involved in selecting and approving the materials to be used. Depending on the course objectives, the following materials should be considered:

- AMES courseware
- Fundamentals courseware
- APICS certification review courses

These may be supplemented by simulations, games, handouts, homework, textbooks and sample examinations. See the *Courseware Catalog* for a full description of these materials. The chapter may develop its own material or buy the APICS courseware. According to the 1995 APICS Chapter Educational Programming Questionnaire Report, 92.5% of the responding chapters use APICS-developed courses. 23.3% of the chapters also reported using instructor-developed courses.

To purchase the materials contact APICS Customer Service at 1-800-444-2742. APICS materials usually offer the fastest and easiest way to prepare for teaching a course.

The following guidelines may help the selection and recommendation of books:

CPIM Certification

- Current *APICS Dictionary*
- Current study guide
- An overview textbook

For each individual module:

- Reprints
- *Harvard Business Review* readings
- Sample test
- At least one book that explains the core terminology, principles and techniques.

Reprints provide good understanding on particular subjects. HBR provides a management perspective and ideas for applications. There are only a few questions on tests from these articles.

Sample tests can be confusing, as references may be outdated and the focus of the class changes. It is best to use sample questions in the study guide. Sample tests could be useful for first test, to make participants familiar with the question format.

CIRM Certification

- Current *APICS Dictionary*
- Current study guide

For each individual module:

- Reprints
- Harvard Business Review Readings

CSCP Certification

- CSCP Learning System
- Single comprehensive resource –one comprehensive examination
- Turnkey Training Solution
- Print and online component

The chapter should clearly assign someone the responsibility of keeping the material in good condition, including tracking the material whereabouts. This often falls to the chapter's vice president of education. The courseware is a significant investment by the chapter and should be treated as such.

Instructors may want to supplement the courseware to suit the needs of their audiences. Stories, specific examples, extra problems often make courses more relevant for students. Supplementing the courseware is usually assigned to the instructor.

Audiovisual Equipment

The types of material to be used will usually dictate the audiovisual equipment required, but the following should be considered:

- Use an overhead projector if you want to use transparencies.
- Use a projection unit if using some form of presentation software such as PowerPoint.
- Make sure screen size is adequate.
- Use a microphone if it is a large class.
- Consider a VCR and monitor (optional, depending on material).
- Decide if a white board, chalkboard or flipchart would be useful.

A company training center or community college may provide equipment at no charge, whereas a hotel will charge extra even for a power cord. If you must rent equipment, could a long-term agreement be worked out? Another alternative is to buy an overhead projector or projection unit and bring it to all events. Again, assign responsibility for this issue.

Working with Community Colleges

A partnership with a local college can prove very beneficial for both the chapter and college. The college's funding is usually based on some calculation of student hours, so administrators may be very interested in hosting an APICS education program. In return, they may provide an excellent facility, audiovisual equipment, marketing and even registration. The chapter provides the instructors and materials. Negotiations must be carefully considered so that true partnering may prevail. The college may want the chapter to rent AV equipment at their standard rate, which could break the typical budget. One Chapter negotiated a deal in which periodically the chapter would purchase the piece of equipment for the college. In return, all AV equipment was provided free of charge.

Quantitative Measures

In addition to course evaluations, the following measures may be used:

- Student hours (number of students in a class multiplied by the number of hours the class is held)
- Number of first-time students
- Number of new members
- Number of instructors
- Surplus margin as a percentage or actual amount

Sample Timetable for Education Programs

Timing	Action
6 months	<ul style="list-style-type: none"> • Determine what program you want to offer. • Line up instructor(s). • Determine budget, break-even point and pricing structure. • Obtain board approval.
5 months	<ul style="list-style-type: none"> • Locate facility. • Define registration procedure.
4 months	<ul style="list-style-type: none"> • Draft marketing brochure. • Define mailing list. • Start advertising the program in chapter's monthly newsletter. • Notify APICS Headquarters of program date, topic and how to register.
3 months	<ul style="list-style-type: none"> • Mail marketing brochure to customer base.
2 months	<ul style="list-style-type: none"> • Provide instructors with copy of materials. Updates to the certification material will be released annually and whenever possible the newest material should be used.
1 month	<ul style="list-style-type: none"> • Confirm facility and instructor(s). • Order student guides. • Order food/refreshments. • Order A/V equipment. • Monitor registration and compare to break-even point. Determine "go/no go" based on facility deadline for cancellation, if appropriate.
1 week	<ul style="list-style-type: none"> • Verify that enough student guides were received. • Verify count on food/refreshments. • Verify AV equipment. • Advise instructor of count. • Prepare class registration materials and evaluation forms.
First day of class	<ul style="list-style-type: none"> • Instructor and/or registration person should be present one hour before the start of class to ensure that the facility is ready and to greet students.
Last day of class	<ul style="list-style-type: none"> • Hand and collect out evaluations. • Reconcile bill for room, food/refreshments and AV equipment.
1 week after end of class	<ul style="list-style-type: none"> • Submit voucher to chapter treasurer for payment of all bills, including instructor's payment. • Review evaluations and prepare summary along with quantitative measures. • Prepare budget to actual and summary report for the Board.

Supplemental Reading

- *Marketing APICS Educational Programs in a CBT Environment*, by Scott Mandeville, CPIM in the 1995 APICS Volunteer Leadership Workshop Conference Proceedings
- 1996 Volunteer Leadership Workshop Conference Proceedings.
- *Educational Programs: Techniques at the Chapter Level*, by Henry Hutchins, CFPIM, 1988 Volunteer Leadership Workshop Conference Proceedings.

III. Mentoring

APICS – The Association for Operations Management has a mission-critical need to foster instructor excellence. Superior subject matter knowledge and instructor skills are necessary for those who represent APICS and deliver its material to members and non-members alike.

Experienced and highly skilled instructors have developed their expertise over time and through much practice. They will have had many opportunities to hone their craft and skills. In addition, they will most likely have received some guidance from one or more mentors too.

Every APICS chapter should have an instructor mentoring process to ensure a steady stream of highly capable instructors to deliver its training and education programs. Such a process would use the talents of the best instructors as wise and trusted counselors to pass on knowledge and skills to other instructors. A well-organized mentoring process will be both proactive and reactive. The proactive portion should be designed to create highly skilled instructors, while the reactive part should be designed as a refinement process based on performance feedback.

Such a mentoring process might focus on the general issues: subject matter knowledge and training/instruction skills. This process would likely consist of formal instructor development training such as conducting Train the Trainer, and Learning Dynamics for Instructors courses, taking the certification exams, and auditing related subject matter or body of knowledge courses. The process should also include a structured assessment of the instructor such as evaluation forms class participants, and even the mentor as well, to identify opportunities for improvement. Finally, the process should include some form of less formal exchanging of opinions and ideas or information, answering questions, diagnosing problems, and updating materials through “roundtable” type discussions or one on one tutoring.

These activities fall into one of three areas: subject matter/body of knowledge, instructional materials, and training/presentation skills.

Subject matter/body of knowledge expertise: This area of mentoring involves addressing the following issues to ensure that instructors have a high level of subject matter competence:

- helping instructors to study for taking, or retaking, and passing CPIM and/or CIRM exams
- tutoring on or positioning of subject matter within the larger body of knowledge
- discussing and answering questions that come up in classes
- answering questions that the instructor may have as he/she prepares to teach a course
- Conducting instructor focus groups or tutoring for studying of new material

Instructional materials: This area on mentoring addresses the materials the instructor actually uses in the class and includes:

- ensuring that the instructor has the latest materials, errata, and so forth, issued from APICS Headquarters as part of the ongoing effort to upgrade and refine the courseware
- helping to customize or personalize course materials to meet the needs of the instructor and the class
- finding and supplying of supplemental materials to add to the courseware

Training skills: This area of mentoring addresses the training and presentation skills of the instructor and might include:

- co-instructing courses with a more experienced instructor
- auditing a class or course to provide specific critique and advice based on actual observation
- reviewing instructor evaluations to identify and prioritize improvement opportunities, that may include reference to the “recommendations for where to look for advice for improvement” matrix cross-referenced to the instructor evaluation form
- providing reference sources for improvement
- coaching on individual skill improvements through one-on-one practice or further auditing
- helping to diagnose problem situations that arise in class and establish action plans to resolve them
- identifying additional training or development opportunities

A mentoring process provides many things of great value to those involved in the APICS education mission. Most obviously, it creates a more formalized process for the chapter to develop the continuing stream of new and improving instructors it needs to deliver the education that is at the very heart of our existence. It will substantially ease the struggle of trying to find instructors to deliver the APICS body of knowledge. Secondly, it creates a safe and comfortable environment in which new or aspiring instructors can develop knowing that there is a source of aid and training. And finally, it provides a career path, a position of need, for the most skilled and experienced instructors to aspire to.

The Education Forum identified the need to develop a strategy for instructor development, qualifications, and evaluation as well as new or updated course rollout. Strategic Objective #6 states, “...will encourage the development of chapters to enable delivery of consistent quality for educational offerings, products and services.”

Following, the Instructors Strategy Team shares the tools and materials it developed. The group reviewed the relevant intermediate objectives of the APICS Education Strategy and rated each objective by the four criteria below. The purpose was to use the objectives as a platform to create an action plan for development and implementation and for future dialogue. The team recognized the need to build a shared sense of community between APICS Headquarters and the chapters and hopes that by providing tools, guidelines and improved methodologies for chapters to use as they needed to improve individual education programs, the chapter education programs will become more successful and the whole APICS family will benefit.

The Instructors Strategy Team created a set of guidelines or standards to which collectively we can strive, much as we set targets or goals in our business and personal lives. We don’t always reach the goals but appreciate the value of every step in our journey to excellence. Our experience tells us that without the goals or standards, excellence is seldom achieved. Recognizing that anything we develop can only be a recommendation to the chapters, our work centered on four themes:

- 1) **Rollout** – Do a better job of introducing new courses to the chapter or instructor network for preparation before teaching.
 - Initiatives for Instructor Readiness: A “net change” document listing all changes made to the new courses will be created. “Cliff Notes” document may be created to accompany the “net change” document. Train the trainer presentation may be developed for region meetings.

- Create a flowchart that depicts all the courses in possible “education paths” with questions that will help the prospective student determine which education path will best satisfy their individual needs. Create the draft and then send it to the C&C Council and Education Forum for review. This could become a major component of our marketing/selling strategy at both Chapter and national.
- 2) **Qualifications** – Instructor qualifications should fit with the overall education strategy of qualifying enough instructors to meet customer demand. We must also be concerned about maintaining high-quality instruction. We recommend Entry and Senior levels of qualifications for chapter instructors and another level for APICS national instructors. APICS instructor qualifications and program will be developed. We hope this will provide instructors with a clearly defined career path.
- 3) **Development** – How should we collectively set standards and train instructors? How can we create a career path for instructors to encourage ongoing development?
- Are the Train the Trainer and Learning Dynamics courses adequate or are changes needed to help prepare instructors for the use of new technologies and approaches? How can we help Regions and chapters take better advantage of these programs?
 - Instructor Mentoring guidelines assigned we created see page 21.
- 4) **Evaluation**
- We created one standard form with questions about the instructor that can provide more specific feedback to the instructor. (See attached).

We hope these improvements and materials will help make the introduction of new courseware much more successful and provide valuable support to the Chapters

Role of the Regions

- Assist in the development of chapter education programs and provide a forum to discuss successes and adaptations.
- Provide a forum for the rollout of new courseware to the chapters. To communicate:
 - Guidelines, rationale and value
 - Positioning and scheduling of new courses
 - Net changes and new features of the existing courseware
- Provide a forum for feedback on guidelines developed for instructors and chapters as well as the course material, in general.
- Offer Train-the-Trainers and Learning Dynamics programs periodically.

The Instructor’s Strategy Team hopes to continue to collect examples of excellent chapter policies, guidelines, ethics statements and great ideas to include in future editions of the Education Chapter Leadership Handbook. We regret we may not be able to use all submissions in their entirety, but know they will all inform the Education Forum of the work and ideas of the chapters.

APPENDIX A - Instructor Evaluation Form

Instructor: _____ Date: _____

Course name: _____ Evaluator (optional): _____

Instructor (5 = Expert, 4 = Very Good, 3 = Satisfactory, 2 = Needs Work, 1 = Unacceptable, N/A = Not applicable)

		5	4	3	2	1	N/A
Presentation Skills	1. Appeared prepared & demonstrated subject knowledge						
	2. Exhibited poise & confidence						
	3. Effectively delivered (attitude, enthusiasm, voice, eye contact)						
	4. Used media effectively (flipcharts, overheads, projector, etc.)						
	5. Encouraged participation & questions						
	6. Listened effectively to students						
	7. Handled disruptions in class						
	8. Used questioning effectively						
	9. Gave useful feedback (incl. answering questions)						
Instructor Format	10. Stated objectives & main points clearly at beginning of each lesson						
	11. Covered main points adequately enabling students to meet objectives						
	12. Provided practical exercises, examples, applications, & illustrations						
	13. Summarized main points at the end of each lesson						
	14. Used time effectively; was concise & to the point; did not get off on tangents						
	15. Explained how the material could be used (relevancy to the workplace)						
	16. Assessed comprehension of students						
Overall instructor evaluation							
Publicity, Registration & Facility	17. The publicity adequately described the course as delivered.						
	18. The registration process was effective.						
	19. The facility provided an excellent learning environment.						
	20. Overall satisfaction with the course.						

Especially for ratings of 1 or 2 above, what would you suggest the instructor do to improve?

General comments about the instructor:

(Please write additional comments on the back of this form.)

APPENDIX B - How to Sell APICS Education

The purpose of this document is to provide an outline for selling education. Use it in conjunction with other tools discussed in this handbook.

1. What type of program will the chapter offer? Remember don't sell just what you can teach. The neighboring chapters, the Region and Society all have instructors that could help. So a broad catalog that can be tailored to meet their objectives will be more attractive.
2. Create a list of prospective companies that will be your first target. Don't spend too much time creating the list. It will change. Important thing is to get started.
3. Modify the *Sell Chapter Education Letter* to fit your situation and the prospect. Each prospect should receive a personalized letter. Send a few letters at a time because it is critical to make a follow-up call to those prospects within 1-2 weeks.
4. Make the follow-up call a week after the letter is sent. Objective should be to schedule a visit when you can discuss specifically what they might need.
5. Identify the solution. What are you going to propose? In some cases it is very simple and you can discuss it immediately with the prospect. In other cases it may require some thought and research. Be careful since prospects tend to remember what you have said. While misspeaking may be a simple error, it could cause you problems later on. This is where it may be beneficial to contact someone on Region Staff. See the attached list of issues.
6. If the opportunity is passed to someone else it is still your responsibility to follow-up to make sure it is addressed in a timely and satisfactory manner. That will go a long way in creating a favorable long-term relationship.
7. Review the solution and the cost structure with the Chapter's Board of Directors or follow the appropriate chapter procedure.
8. If possible seek some informal feedback from someone at the prospect to make sure you are on track.
9. Develop and deliver a proposal using the *Proposal Template*.
10. Follow-up with the prospect to get the proposal signed.
11. Follow-up after the education was started to make sure expectations are being met or could something be improved. Repeat when the class is complete.

Issues

- Will a standard APICS course satisfy the prospect's objectives?
- If not, could one or more standard courses be tailored to fit the bill? Tailoring is where an instructor can prepare to teach the course by just teaching some of the topics and not teaching others. This is in contrast to customizing a course. Customizing means someone has to create additional content or in some fashion work with existing content to substantially change it. This usually requires extra time and should be charged for at some hourly rate. A frequent request is to have the instructor incorporate the prospective

company's examples into the course. It is best to ask the instructor to estimate what will be involved and provide an estimate of the time and expense.

- The prospect needs a course taught in a special delivery media to reach a geographically dispersed audience. This is feasible but asks for advice from the Region Staff.
- If you don't have an instructor, check with neighboring chapters, the Region Staff or Society. If an instructor needs to travel far then the prospect may need to be more flexible with timing. Often this means doing the class in full days as opposed to 3-hour segments. You can still offer a better value than most consultants or schools.
- Instructor Travel Expense can be charged directly to the company or the instructor's hourly rate can be increased to cover travel expenses. This may include travel and per diem, AV rental costs, copy expenses, etc.

If you have a question or a unique situation that you would like to discuss, contact:

Bill Grauf
Region 13 Staff
630-303-3585
billgrauf@yahoo.com

APPENDIX C - Sample Letters to Sell Chapter Education

This letter should be produced on chapter letterhead.

(Insert Date)

NAME
TITLE
COMPANY
ADDRESS

Dear *(Insert Name)*:

We're pleased to announce that the APICS _____ Chapter has updated its programs to better meet the needs of today's operations management professional. The enclosed brochure provides details about APICS' educational offerings, including the Fundamentals courses and the nationally known CPIM and CIRM certification courses.

Did you know that _____ Chapter can offer a variety of APICS courses at your facility? **That's right. We will provide top-notch APICS-Qualified Instructors to train your employees** on your company's premises. **Our instructors are hands-on practitioners, many with 20 or more years of experience. These practitioners can put the APICS body of knowledge to work for your company while your staff becomes APICS certified. We'll bet that this training solution will be convenient and appreciated by your employees.**

How do you determine which APICS programs meet your firm's training needs? **We can assist you. We can schedule an instructor team to meet with your management team to identify programs that meet your company's specific staff training needs. Let us help you improve your business through education.**

Have other companies brought APICS programs in-house? **You bet. Many companies offer successful in-house APICS programs annually. These companies benefit by reinforcing their goals and staff acquires knowledge applicable to their facility. Why not try this convenient training format to help your employees gain the knowledge needed to compete in today's business environment?**

How can you find out more about this convenient training format? **We would be happy to meet at a time convenient for you to discuss your firm's training and educational goals. I will soon contact you to answer your questions. In the meantime, I can be reached at *(Insert E-mail Address and/or Telephone Number)*. You may also visit our Chapter Web site at [http://www._____](http://www._____.) for more information.**

Thank you and have a great day.

Sincerely,

(Insert Name)
(Insert Chapter Title)

Enclosure

This letter should be produced on Chapter letterhead.
APICS Education Chapter Leadership Handbook

(Insert Date)

*NAME
TITLE
COMPANY
ADDRESS*

Dear (Insert Name):

In today's challenging economic times it is important to find ways to significantly reduce costs yet continue to improve operations.

To help you and your management team keep your company's improvement initiatives underway the _____ Chapter of APICS is offering education at your location as well as public classes. We can work with you to tailor an agenda to satisfy the specific learning objectives that will drive the benefits you seek.

Following is a partial list of the possible topics:

- Basics of Supply Chain Management
- Fundamentals of Production and Inventory Control
- Inventory Management and Cycle Counting
- Lean Manufacturing
- Integrated Resource Management
- CPIM Review Courses
- Enterprise Resource Planning
- Train-the-Trainer

The _____ Chapter only provides experienced and certified instructors that have the industry background required to engage the students in a rewarding learning experience.

TESTIMONIAL OF A PAST EDUCATION SUCCESS

Class timing and delivery options are flexible. The cost is extremely competitive. I will contact you next week to discuss how we might be of service.

Sincerely

*NAME
POSITION
PHONE NUMBER
E-MAIL ADDRESS*

APPENDIX D - How to Submit Chapter Seminar Announcements

Opportunity to Publicize Chapter Events

As any APICS member will tell you, APICS magazine is our organization's award-winning flagship publication, featuring innovative ideas and real-world strategies for inventory, materials, production, and supply chain management; planning and scheduling; purchasing; logistics; and warehousing. What many APICS chapter officers might not realize, however, is that the magazine offers free promotion of chapter seminars in every issue. Within the APICS Report section of the magazine, chapters can publicize upcoming events simply by submitting the necessary information to APICS magazine's Senior Editor.

Don't miss this valuable marketing opportunity! Submit your announcements to editorial@apicshq.org with the following information included (incomplete announcements may not enjoy the benefits of timely publication):

- sponsoring chapter name
- event name
- program date
- location (including venue; city and state; and, if relevant, province)
- any keynoters or presenters
- a URL to visit or a person to contact to register and receive more information
- a contact name with phone or e-mail address (for any questions from the editor).

Please keep in mind: Magazine production is a lengthy and involved process. The sooner announcements are received, the better—and two- to three-months prior to publication is preferred. If you have any questions, please contact Elizabeth Rennie at e_rennie@apicshq.org.

APPENDIX E - Using *My Chapter* to Promote Events

The Online Chapter Locator and Calendar of Events Updates under *My Chapter* on the Volunteer Resources section of the APICS Website can be used to inform the public about your chapter's events. The Online Chapter Locator also displays the chapter name, president's name and chapter dues. Use this section to:

- update key chapter contact information
- manage your chapter's calendar of events
- provide a link to your chapter's Website
- provide a description of your chapter's services and activities



I. Add an Event

1. To **add an event** to be displayed on the online Chapter Locator, select the **add event** button.
2. Add event details in the appropriate fields.
 - a) Program Type (drop down menu)
 - b) Course/Event Title
 - c) Instructor/Presenter
 - d) Program State Date
 - e) Program End Date
 - f) Course Event Description
3. Save your changes. Once you have added an event, you will be taken back to the locator/event home page where you can view your chapter's events calendar.
4. To manually view your chapter information as it will appear online. Go to <http://www.apics.org/apics/chapters.aspx>

II. Edit or Delete an Event

1. To edit a saved event, select the **edit** link corresponding to the event.
2. To delete a saved event, select the **delete** link corresponding to the event.

APPENDIX F – Sample Break-Even Analysis Formulas

Education Break-Even Analysis	
Public Class	
Number of Students	?
Price per Student	?
Income to Chapter	# of Students x Price per Student
Cost of Instructor	?
Travel Expense	?
AV Rental Expense	?
Other Expenses	?
Materials	# of Students x Material cost per student
Expenses to Chapter	Total for all expenses
Surplus for Chapter	Income - Expenses

Education Break-Even Analysis	
In-House Class	
Number of Students	?
Price to Company	?
Income to Chapter	= Price to Company
Cost of Instructor	?
Travel Expense	?
AV Rental Expense	?
Other Expenses	?
Materials	# of Students x Material cost per student
Expenses to Chapter	Total for all expenses
Surplus for Chapter	Income - Expenses



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