



Administrative Memo #219
Continuing & Professional Education Program
June 2018 (rev. June 2015)

Continuing & Professional Education (CPE) for forestry and natural resource professionals is among the “Keys to Success” outlined in the Dean’s 2012 Strategic Vision. Accordingly, CPE is part of the evaluation criteria in promotion, tenure, and annual performance of faculty and staff. The College has a strong history of professional forest stewardship through research, education, and outreach. The CPE Program operationalizes the College’s ability to relay timely and relevant science, appropriate environmental conservation, and cost-effective management techniques to natural resource professionals, scientists, policy-makers, mill managers, forest workers, and others.

CPE Event Leaders are responsible for delivering programs that meet the mission, values, and quality standards expected by the College and set forth in this memo.

Mission of the CPE Program (CPEP)

CPEP provides high-quality programs to working professionals in forestry, natural resources, and forest products to stay abreast of rapid technological changes, breaking research, shifting public awareness, and changing environmental standards. Professionals who engage in our CPE programs should expect to receive professional training pertinent to their field that enhances their professional competency, provides networking opportunities, and benefits their organization via the infusion of new ideas and best practices based on the current research.

CPEP Values

- Lifelong learning for forestry, natural resource, and forest products professionals.
- The use of vetted science to inform policy and decision-making.
- A commitment to scientific discovery through sound research techniques.
- Proper management and sustainable use of natural resources for social, economic, and ecological value.
- Diverse and inclusive educational opportunities that provide professionals with the tools they need to be culturally respectful, professionally competent, and civically responsible.

Event Proposals

CPE activities can be developed individually by faculty, in collaboration with other faculty members, as a Department or College Unit, or in collaboration with other University colleges, faculty members, or outside entities. The use of the CPE Program and Coordinator is not mandatory - it is an optional service provided by the CoF for faculty who wish to be supported in CPE efforts and events.

When using the CPE Program, each event requires an Event Leader who will work directly with the CPE Coordinator to identify budgetary needs, event logistics, and who will take responsibility for providing metrics about the event. Reporting that the event will take place and reporting metrics for the event, however, is required by the Event Leader.

CPEP Structure

The CPEP delivers programming via a professional faculty Coordinator. The Coordinator is funded at the discretion of the Dean with support from the Forestry and Natural Resources Extension program. The Coordinator is supervised by the Dean's delegate, usually the Associate Dean for Outreach and Engagement.

Responsibilities of the Coordinator include initiating comprehensive CPE activities in collaboration with faculty and relevant professional organizations in support of the mission of the program. The Coordinator is responsible for the quality of the programming, from logistics, to content delivered, to post-activity evaluation. The Coordinator is also responsible for developing realistic budgets for activities with collaborators and ensuring all activities are delivered within those established budgets. On an annual basis, the Coordinator will provide a report to the Dean outlining the activities, professionals served, and expenses of all CPE activities.

The Coordinator will work collaboratively with the Event Leader (the designated faculty or professional organization member) to deliver programming.

Shared responsibilities include:

- Activity Forecasting: determining concept, demand, and timing.
- Development of an Activity Proposal.
- Development of an Activity Budget.
- Development of an Evaluation Plan.

Responsibilities of the Event Leader are:

- Identification of funds that support the activity.
- Developing the educational and training materials and content required for the activity.
- Presenting the course content.
- Communicating with the Coordinator in a timely manner to ensure deadlines are met for activity planning.
- Identification of possible participants and recruitment of participants for the activity.

The Coordinator will:

- Provide event planning assistance: identify facilities and providers; develop a comprehensive budget and ensure funds are committed to ensure a quality activity; promotion of the activity through all venues to which Coordinator has access.
- Liaise with Conference Services and/or other service providers to book space, catering, registration management, marketing, vendor payments, printing/delivery of materials for activities, and other logistical management needs.
- Liaise with the Professional & Continuing Education Office (PACE) for course development, when appropriate.
- Manage the Professional Certification and Continuing Education Credit Allocation.
- Ensure appropriate College branding is present in all materials, websites, and registration pages for all activities.

CPE Activity Budgeting

The Coordinator will provide assistance in developing a comprehensive, and realistic, activity budget. The CPE Program does not provide funding to put on CPE activities, but works with Event Leaders to identify and/or apply for funding. Participant Fees will be set at a level that affords the organizers full cost-recovery. This includes recovery of costs associated with:

- Faculty and Staff time and effort
- Access and costs of facilities, venues, and equipment
- Direct costs such as food, lodging, coffee breaks, etc.
- Transportation (to and from field sites, where applicable)
- Program Development
- Publications or other education materials
- Event website development, registration, and maintenance
- Administrative Overhead payable to the University
- CPE Program Fee (10% of registration fee)
- Any promotional materials provided to participants
- Other costs applicable to the activity

Faculty compensation options are event-dependent and are subject to all CoF and University rules. Examples of ways in which the compensation can be handled include: FTE charge, part of an individual's annual instructional/research FTE, funds transfer to a faculty account, summer salary, or Overload Compensation (all subject to University Policy). Examples of program types that meet the selective criteria to receive overload compensation include major new ongoing programs, programs that address a particularly timely issue, programs that are outside of expected normal faculty job performance, and programs that represent a significant increase in faculty workload. The compensation will be derived from all or part of the instructional salary (FTE) charged against a CPE event. This method of compensation is handled at the discretion of the Department Head and such arrangements will comply with all University policies.

Quality Control and Event Evaluation

The Coordinator is responsible for ensuring CPE activities are professionally managed. For those activities in which faculty and staff of the College do not engage the Coordinator, the Event Leaders are directly responsible for developing and delivering a high-quality educational experience for their audience. The CPE Program requires that CPE events be evaluated by the participants. A sample evaluation form, which can be used as-is or customized to the liking of the Event Leader, can be found on the CPE website.

Event Cancellation

A source of funding separate from Participant Fees must be identified to cover costs associated with event cancellation as some fees cannot be refunded after contracts have been signed. Each activity must also have a posted Event Cancellation Policy posted for participants to view; the policy should include:

- **Refund Policy:** Date by which a participant must cancel to receive a refund (if refunds will be given). There can be multiple dates for refunds at 100%, 50%, etc.
- **Minimum Enrollment:** What the minimum enrollment of the program must be (and by what date) for it to be offered and what will happen if the minimum enrollment is not met.
- **Substitutions:** Whether or not substitutions are allowed (if someone is unable to make it to the event but they have secured a substitute that can attend in their place).

Use of College Facilities for CPEP Activities

All CPEP activities must adhere to the following:

- Any College facility used for CPE activities (on campus, in our research forests, or any field site) **must be scheduled by the Coordinator and at the request of a member of the College who will be present at the activity.** Use of College facilities may be subject to charges for use, including reservation fees, equipment, IT assistance, room set-up/break-down, and cleaning fees.
- If the Event Leader is not a faculty or staff of the College, a relevant College representative must be given the opportunity to introduce the College and its work to participants as part of the agenda.
- An Event Report Form must be submitted to the Coordinator after any CPE event in order to maintain accurate metrics on all CPE activities (even those not directly supported by the CPEP or Coordinator).

Financial Administration

By law, program billings and fee collections must be done through bonded financial offices. The CPEP cooperates with the College Business Office and OSU Finance and Administration for programs that are initiated by current OSU faculty or staff to ensure that the registration fees are handled appropriately. Collected fees are deposited in the OSU financial system and become State of Oregon funds, subject to all applicable fiscal rules and procedures. A unique OSU index number will typically be assigned to each individual event and will be closed out once the event accounts are reconciled. Please note that all OSU index accounts will be subject to a fee determined jointly by the University and the College.

Although continuing education budgeting is based on full cost-recovery, there are instances when the program revenue does not cover the costs associated with the activity. Most commonly these instances are a result of under-enrollment or course cancellation. Occasionally, it can be a result of expenditures that exceeded an agreed upon budget. Net losses are the responsibility of the department home of the individual faculty member who identifies him/herself as the Event Leader, or another funding source identified at the onset of program planning phase. The CPEP, with the approval of the Associate Dean or Dean, may agree to assume the risk for losses at the onset of the program planning phase.

OSU, the College, or any department in the College shall not be responsible for losses incurred if the Event Leader is not employed by the University.

There may be instances in which a program has a net revenue gain. Most commonly, these instances result from higher enrollment than originally forecast, or expenditures below those initially budgeted. Excess program revenue from CPE activities will be deposited into Department Special Project Accounts (SPA's) to be used at the individual faculty's ("Event Leader") discretion (within the limits set by the Department and/or OSU), in cases where the Department and/or Event Leader assume the risk for a loss. In cases where the CPEP has assumed the risk for a loss, any excess program revenue will accrue to the CPEP.

Approval:



Anthony S. Davis, Acting Dean

6-7-2018

Date