

WSEHA

Education Manual



Developed by the
Education Committee
David Lenning, Chair
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INTRODUCTION

PURPOSE

The purpose of this manual is to provide guidance concerning the planning and conduct of educational workshops, training courses and similar educational event, and of the administration and recordkeeping functions associated with such endeavors. Specifically, this manual is designed to:

1. Provide guidance to the members of the Education Committee, and to the members of individual sub-committees responsible for planning, financing, and conducting educational offerings; and
2. Provide guidance to the Board of Directors concerning the responsibilities and procedures for evaluating and approving educational activities.

POLICIES

It is the policy of the Washington State Environmental Health Association to support the professional growth and development of its members through the following activities:

1. The Association shall encourage, sponsor and/or undertake the development of quality educational opportunities for its members.
2. The Association, through its Education Committee, shall ensure that proper records are collected and maintained which will allow proper fiscal and qualitative evaluations of the courses conducted and/or sponsored by the Association.

PROCEDURES

This manual is divided into two sections, roughly corresponding to policies outlined above. The first provides guidance for members, committees, and the Board regarding the planning, organization, funding and conduct of training courses, workshops, seminars and similar educational events. The second spells out the type of records and reports which must be prepared by the committee sponsoring or conducting a training session.

COMMITTEE ORGANIZATION AND RESPONSIBILITIES

1. **Committee Charge:** The goals of the Education Committee are to:
 - a. Provide educational opportunities for Association members and other with interest in environmental health issues;

b. Enable Association members to better educate the public in all phases of environmental health;

c. Utilize the WSEHA Newsletter and the NEHA Journal of Environmental Health for dissemination of educational information and opportunities to the Association membership as well as others;

d. Work with other professional organizations to enhance the provision of educational opportunities for members and others; and,

2. **Committee Composition:** The Education Committee shall consist of at least five (5) members. At a minimum, the Committee's membership shall consist of the following:

a. The Chair:

1) Ensures that the charges of the Committee are accomplished;

2) Arranges and conducts committee meetings;

3) Provides liaison between the Education Committee and the WSEHA Board of Directors, including the provision of a report to the President-Elect prior to each regularly scheduled meeting of the Board and the conveyance of information from the Board to the Committee;

4) Ensures that the Committee membership is at full strength and provides a list of new and continuing Committee members to the Board by June 1st of each year;

5) Fixes responsibilities for chairing and/or providing liaison for the ad hoc subcommittee responsible for planning and implementing an educational event, whenever a proposal for such an event is received by the Committee;

6) Ensures the development and presents to the Board, a prioritized schedule of proposed educational activities by July 1st of each year;

7) Oversees the development and submission of a proposed Committee Budget to the Finance Committee and the WSEHA Board of Directors no later than February 1st of each year; and,

8) Develops an annual report of committee activities by April 1st of each year for submission to the Board of Directors.

b. The Vice-Chair:

- 1) Assumes the role of Chair upon its vacation by the previous chair¹
- 2) Conducts Committee meetings in the absence of the Chair;
- 3) Conducts a periodic review of the Education Manual and recommends needed revisions to the full Committee, and to the Board of Directors;
- 4) Participates in the normal functions and activities of the Committee;

c. The Records and Reports Sub-committee Chair:

- 1) Oversees the operation of the Records and Reports Sub-committee;
- 2) Maintains an active liaison between the Sub-committee and the full Committee; and,
- 3) Participates in the normal functions and activities of the Committee.

d. The Representative of the Environmental Health Directors:

- 1) Represents the interests of the Washington State Environmental Health Directors group;
- 2) Maintains a liaison between the Education Committee and the EH Directors; and,
- 3) Participates in the normal functions and activities of the Committee.

e. And, Other Members Appointed by the Chair:

- 1) Serve as the Chair of or liaison between an ad hoc subcommittee established to coordinate a specific educational event and the Education Committee; and,
- 2) Participate in the normal functions and activities of the Committee.

¹ Normally, the Vice-Chair shall be elevated to the Chair position upon the retirement of the previous chair at the annual meeting of the Association. This should not be construed to mean a Chair may serve for only one (1) year. The Association recognizes the necessity of attempting to achieve a balance between the sense of continuity which can be achieved through the retention of a committee chair for several years, and influx of new ideas and enthusiasm which can follow a change in the leadership and/or membership of a committee.

PROCEDURES FOR PLANNING AN EDUCATIONAL EVENT

POLICIES

1. WSEHA encourages the presentation of environmental health related educational opportunities and will assist and, in some cases, take an active role in the planning, presentation and follow-up of such courses, seminars, conferences and workshops.
2. No affiliation or sponsorship by WSEHA may be stated or implied without prior approval being obtained in accordance with the procedures contained in this manual.
3. Interested individuals or organizations need to consider the following levels of involvement which may be undertaken by WSEHA:
 - a. WSEHA Presented or Sponsored: WSEHA does the planning and assumes full financial and legal responsibility for the content and presentation of the educational event.
 - b. Co-Sponsored by WSEHA: WSEHA shares the production responsibilities of the educational event with one or more other groups. WSEHA may or may not have a financial or legal responsibility for this type of event.
 - c. Endorsed by WSEHA: Another group or organization assumes the total financial, production and legal responsibilities for the event. WSEHA will lend its name, and provide a set of mailing labels of its members if requested, to the sponsoring organization(s) only if the event is felt to be of interest to a majority of the WSEHA members and the event's proposal is found to be acceptable to the Education Committee.
 - d. The planning of any educational event shall adhere to the intent of the guidelines contained in this section. Deviations may be approved by Chair or by the Board in special circumstances.

PROCEDURES

1. **Proposals**: Anyone wishing to organize an educational event involving WSEHA as a sole or joint sponsor, co-sponsor or endorser, should obtain a planning packet from the Education Committee. The packet contains all of the information and forms necessary to assist the person(s) in planning for the event and in collecting the information needed for submission to the Education Committee. At a minimum every proposal should contain the following information:
 - a. Level of Involvement: An explicit statement of the level of WSEHA's involvement (i.e., sponsor, co-sponsor, endorser) and an estimate of the degree of commitment necessary in terms of time, money and resources.

b. Course Objective: List the knowledges and/or skills which a person attending the event is expected to gain.

c. Course Format: Describe the manner in which the course is to be conducted, e.g., a lecture, discussion panels, laboratory exercise, seminar, etc.

d. Audience: Describe the intended (target) audience of the course and provide an estimate of the number of individual attending the event.

e. Scheduling: Provide the time(s), date(s) and location(s) of the event, including the reason for selecting a particular location.

f. Proposed Budget: A proposed budget should be included which details all expected revenues and expenditures, except that a budget is not required for events in which no financial obligations will be incurred by WSEHA. The budget should indicate the assumptions/methods used in determining the registration costs. If the proposal is for a series of the same event (only the dates and locations change), only one budget for the entire series is required, unless the registration costs will vary by location.

2. **Approval**: Anyone wishing to have WSEHA endorse, sponsor, co-sponsor or conduct an educational event must receive authorization and approval for the event in accordance with this section. (See figure 1.)

a. Initial Submission: Any member of the Association may submit a proposal for an educational event. Also members of other associations or organizations, acting on behalf of their organization, may submit proposals to the Education Committee.

In most cases an ad hoc subcommittee may already be formed develop this proposal and implement the remainder of the planning process noted in this section. However, if such a subcommittee does not exist, the Chair of the Education Committee shall appoint one to perform the planning and conduct of the proposed course. (Where WSEHA is not assuming a financial or legal obligation, the proposal may be submitted directly to the Education Committee without the formation of an ad hoc subcommittee.)

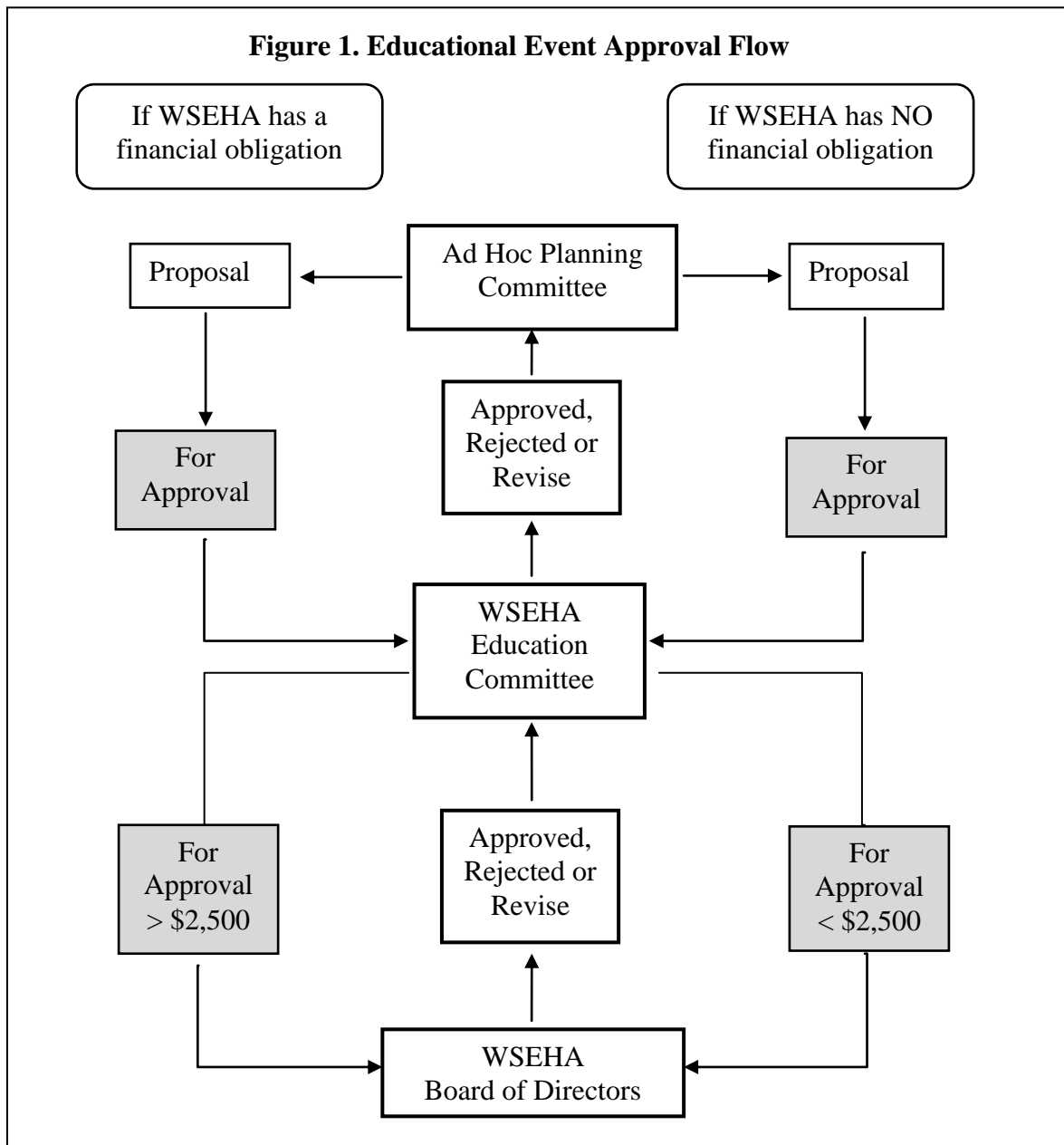
b. Committee Review: A proposal for a new educational event must be submitted to the Education Committee at least ninety (90) days prior to the event date. The Committee will review the proposal forward its response within thirty (30) days of its receipt of the proposal.

c. Approval: Final authority for the approval of all educational events resides with the Board, however, this authority has been delegated to the Education Committee for any events in which WSEHA does not have a financial obligation and in those cases in which the financial obligation of WSEHA is limited to less than \$2,500.

3. **Event Planning:** The following procedures apply only to those educational events for which WSEHA is assuming a financial obligation. However, they should also be helpful for any event in which WSEHA is taking an active role in the planning or conduct of the event

a. Location: Locations should be planned to provide quality education to all members. While the geographic distribution of WSEHA members must be considered, locations should be selected so as to provide reasonable access to events by all WSEHA members.

1) Every attempt should be made to schedule events at locations where there are facilities which WSEHA can use at little or no charge in order to assist in keeping registration costs to a minimum.



2) The Education Committee will compile and maintain a list of sites and facilities throughout the state that can be used for free or for a nominal charge. The information about each site will include:

- the name and phone number of a contact person;
- a description of the facility, including the number and types of room(s), and their size seating capacity;
- the availability of audio-visual equipment, projectors, screens, blackboards, microphones and other teaching aids;
- the availability of restrooms, sinks, kitchens, and other appropriate amenities; and
- information about nearby restaurants and/or hotels.

b. Publicity: The subcommittee responsible for the educational event is responsible for developing and disseminating appropriate information about the event. Depending upon the size and target audience, information may be disseminated through brochures and announcements, the WSEHA Newsletter, the newsletters or correspondence of other associations, and/or the popular news media. The planners should consider the appropriate degree and type of publicity which is desirable for each event.

1) *Announcements/Brochures*: The subcommittee may use any format for the announcement or brochure which it feels appropriate. Several examples of past brochures are included in the planning packet.

a) At a minimum the announcement/brochure should contain the following standard information:

- WSEHA Logo
- Brief statement of the scope or purpose of the event
- Indication of the target audience for the event
- List of speakers or instructors
- An outline of the course or subject to be covered
- Information on the date(s), times and location
- Registration fees

b) Other registration information might include the date on which the registration fee is due, deadlines for full or partial refunds, maximum number of participants, etc.

c) A registration form should be included as part of the brochure. The form should provide space for the registrant's name, address, affiliation and phone number. It should tell the registrant who to make the check payable to, and where to send the form and payment. It is also advisable to list a contact person and provide his/her phone number.

d) If CEUs are to awarded for the event, the number of CEUs, if known, should be included on the brochure.

2) *Internal Announcements*: Most of the information contained in the brochure should be provided to the Chair of the Publications Committee for inclusion in the next issue

of the WSEHA Newsletter. It is also a good idea to have a copy of the information placed on the Department of Health's electronic bulletin board (DOH Net). This can be accomplished by anyone with a personal computer and a modem by dialing the DOH Net at (206) 753-4352, or by contacting either the Chair of the Education Committee or the Executive Secretary of the Association.

3) *External Announcements:* For some courses, it may be appropriate to advertise more widely. Depending upon the size and target audience, information may be disseminated through the newsletters or correspondence of other associations, and/or the popular news media.

c. Mailing Announcements/Brochures:

1) *First Class Mailings:* If the number of announcements to be sent out is less than 200, they will have to be sent by first class mail. The responsible subcommittee will be responsible for purchasing stamps, stamping and mailing the envelope or brochure.

2) *Bulk Mailing:* Whenever the number of announcements exceeds 200 pieces, they should be sent out using the Association's bulk mailing permit, if in use. This will greatly reduce the mailing cost. (NOTE: Use of the bulk mailing permit is restricted to WSEHA presented or sponsored events only.) The responsible subcommittee will prepare the announcements/brochures according to the procedures established by the Association's policy and procedures, a copy of which should be included in the planning package. The subcommittee will coordinate the bulk mailing with the Executive Secretary.

d. Budgets: The organizers of the event (i.e., the subcommittee, if one has been established) are responsible for compiling a preliminary budget and submitting it to the Education Committee with the initial proposal. The preliminary budget should be prepared using the standard forms and directions provided in the planning packet.

1) *Registration Fees:* The budget should be planned so that the financial outcome will "break even plus twelve percent (12%)". Therefore, registration fees should be set by dividing the projected expenditures (plus the 12%) by the conservative estimate of the expected number of participants. This will yield the per person cost for Association members. Consideration should be given to setting a higher fee for non-members than the fees established for members (including members of allied or co-sponsoring organizations). To encourage WSEHA membership, the cost differential between WSEHA members and non-members should be \$50 (the cost of a Regular or Associate Membership). A provision may be made to decrease this amount when the Board feels the majority of those attending would not benefit from a membership (such as the pool conferences that pool operators attend).

2) *Expenses:* The intent of WSEHA is to provide quality educational opportunities for its members and other interested parties for as low a cost as possible. The Education Committee, and the Board, will review all preliminary

- budgets with this intent in mind. The following are some possible activities that can affect the total expenditures:
- a) Usually refreshments (coffee, tea, pastries, fruit, etc.) will need to be provided. The ad hoc committee must also determine whether meals should be provided. Food costs usually result in a significant increase in overall costs.
 - b) Parking may be a problem in certain locations and should be included in the costs. This may have some effect on the choice of the location for an educational event
 - c) Speaker costs vary depending on the event location, the distance speakers have to travel, whether the speaker's room and board are paid, and whether honorariums are paid. The initial decision concerning each of these is the responsibility of the ad hoc subcommittee. A listing of possible options to consider when paying a speaker is provided in the planning packet.
 - d) Another major cost item is the printing of announcements, brochures, programs, course materials/handouts, etc.. There are sometimes opportunities to have the minimal printing done by local agencies as an "in-kind" service. The responsible subcommittee should investigate a number of options and consult with the Publications Committee before having printing done by a local printer.
 - e) Coordinating with the Treasurer, it is suggested that major costs, such as printing expenses, honoraria, travel expenses, certificates, etc., be billed to WSEHA or be paid in advance by the Treasurer. For other minor expenses, such as coffee and pastries, it is suggested that an advance be obtained from the Treasurer which will cover most of the anticipated minor expenses. The intent is to reduce the amount of transactions for the Treasurer, and to prevent members from incurring large out-of-pocket expenses which must be reimbursed. (NOTE: For reimbursement of expenses which do occur, see WSEHA Policy & Procedures page II.C.)
- 3) *Final Budget:* A final budget, showing all accounting, must be submitted on the forms contained in the planning packet to the Education Committee within sixty (60) days after the event. All revenue from registrations should be kept and submitted together with a copy of the final budget to the WSEHA Treasurer. Included should be requests for reimbursements, and all bills or other obligations which have not been paid.
- e. Certifying An Event For Credit: The ad hoc subcommittee is responsible for preparing an Application for Certification of a Continuing Education Program for any educational event which WSEHA is presenting or sponsoring.
- 1) Application forms are available from the Washington State Board of Registered Sanitarians (WSBRS). This application is to be submitted, together with a copy of the agenda or program and supporting documentation, such as the qualifications of the instructor(s), number of contact hour, method(s) of instruction, etc., to the

WSBRS. The application should be submitted as far in advance of the event as possible to enable advertising the number of CEUs awarded.

2) The originating subcommittee should receive a formal written reply from the WSBRS. It is the responsibility of the subcommittee to follow-up with the WSBRS in case of any delay or difficulty.

3) Copies of the "sign-in forms", see section 4.b.5 below, and the "letter of award" from the WSBRS should be sent to the organizations requested by the registrants within 30 days of the completion of the event. This includes sending a copy of these documents to the WSEHA Records and Reports Subcommittee and to the WSBRS.

5) In cases where WSEHA is co-sponsoring or endorsing an event, and the sponsoring organization(s) desires the WSBRS to evaluate the event for CEUs, the subcommittee may assist the sponsoring organizations in obtaining such an evaluation by following the procedures outlined above.

4. **Registration:**

a. The method of registration will vary depending on the size of the event. As the number gets larger, the importance of using a computer to do the work increases.

b. Regardless of the methods used for registration, the following activities should be performed.

1) Once a registration form and payment have been received, notification should be sent to the registrant acknowledging receipt of the payment and confirming the event, and its time, date(s) and location. Information concerning lodging, meals and restaurants, parking, etc. may be sent along with the confirmation letter.

2) It is recommended that an on-going registration list be kept as registrations are received. This list is most useful when it is kept in alphabetic order by event and location.

3) If late, or day of the event, registrations are permitted, a form for issuing receipts at the site of the event should be available.

4) As individuals arrive for the event their names should be checked against the registration list.

5) While attendance may be verified by requiring those attending to take a test, a sign-p sheet will usually be sent around during the day. The sheet is for the purpose of verifying attendance and for allowing individuals to indicate where they desires their record of attendance be sent. The sheet may contain a column for the individual to enter his/her social security number.

5. **Certificates of Completion:** A "Certificate of Completion" or a "Certificate of Attendance" should be presented to all registrants who attend the event. A standard WSEHA certificate is available for use, though the subcommittee may choose to develop its own certificate. The certificate should include the individual's name, the title of the event, the number of hours or CEUs awarded, the signatures of the event coordinator, instructor, or WSEHA president.

6. **Event Evaluations:** A course/event evaluation form should be provided to each registrant to enable them to evaluate the event for content, instructor effectiveness, and general learning atmosphere. The instructors and members of the subcommittee should discuss the strengths and weaknesses of the event, whether it met its intended objectives, what changes should be made, whether the event should be offered again, etc. A summary of this evaluation should be written up and included in the permanent record.

7. **Permanent Record:** A complete record of the event must be kept by WSEHA. The ad hoc subcommittee is responsible for submitting the completed record to the Chair of the Education Committee within 60 days of the completion of the event. The Chair is responsible for sending the file to the Executive Secretary. The completed record shall include copies of the following items:

- The course announcement or brochure
- Preliminary and final budgets
- Final registration list
- The final "sign-in" sheet
- The WSBRS CEU application and award letter
- All course materials, notes and handouts
- The summary evaluation of the course