



College of Forestry ~ Office of the Dean  
Oregon State University, 150 Peavy Hall, Corvallis, Oregon 97331-5704  
Phone 541-737-1585 | Fax 541-737-2906 | <http://forestry.oregonstate.edu/>

**Administrative Memo #219**  
**CONTINUING & PROFESSIONAL EDUCATION POLICY**  
Revised June 2015

**Overview**

Continuing & Professional Education (CPE) for forestry and natural resource professionals is among the “Keys to Success” outlined in the [Dean’s Strategic Vision](#) (2012) for Oregon State University’s College of Forestry (CoF). The CoF has a strong history of professional forest stewardship through research, education, and outreach. This illustrates the core of the CoF’s economic sustainability mission and represents the ability of college personnel to relay cost-effective management techniques, the most timely and relevant science, and appropriate environmental conservation and management practices to the natural resource professionals, scientists, policy-makers, mill managers, forest workers, and others. CPE has been identified as a priority for the CoF and is part of the evaluation criteria in promotion, tenure, and annual performance of faculty and staff.

The primary goal and mission of the College’s CPE office is to assist with providing affordable, high-quality continuing education and professional development to working professionals in forestry, natural resources, and other related fields. With the creation of this office, the CoF will provide opportunities for working professionals to stay abreast of rapid technological changes, the social and economic significance of natural resources, increased public awareness, and changing environmental standards throughout the Pacific Northwest.

CPE can be delivered in many forms. In general, the programming is delivered as short courses, workshops, field tours, conferences or symposia, webinars, and/or “institutes”. Courses may be delivered in-person, online, or may include elements of both. The length of the events varies from just a few hours to many weeks of programming throughout the year. Audiences for these events are generally not involved in resident degree-seeking programs; target audiences are relegated to those who have already begun as a professional in the field of forestry and/or natural resources or those who serve these audiences. Events offered by this office will often qualify for continuing education credits by professional societies and organizations.

**Continuing & Professional Education Office Mission, Vision, and Values**

Mission: The Continuing and Professional Education Program in the OSU College of Forestry provides affordable, high-quality continuing education and professional development to working professionals in forestry, natural resource, and related fields.

Vision: OSU's College of Forestry will provide preeminent Continuing and Professional Education opportunities allowing working professionals to stay abreast of rapid technological changes, the social and economic significance of natural resources, increased public awareness, and changing environmental standards throughout the Pacific Northwest and beyond.

#### Values

- Lifelong learning for forestry and natural resource 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.
- Enhancing education through diversity, which provides tools to be culturally respectful, professionally competent, and civically responsible.

#### Responsibilities and Collaboration

The CPE Office works mostly with faculty and staff who are developing ***programming where forestry, forest products, and natural resource professionals are the target audience***. Extension programming (for landowners), teacher education programs, in-college trainings, or events sponsored solely by external organizations (such as conferences or symposia) are not supported by this office.

The CPE Office has a Coordinator who provides leadership and assistance to faculty and staff who host events or courses. The Coordinator position is jointly funded by the Office of the Dean, Forestry and Natural Resources Extension, and the Oregon Forest Resources Institute and reports to the Senior Associate Dean for Outreach & Extension. CPE events are generally faculty-driven with oversight and logistical coordination offered by the CPE Office. College and joint department/college efforts are encouraged and supported. Below are detailed outlines on shared responsibilities and then those that rest solely on the Event Leader or the CPE office.

#### Event Leader Responsibilities

- Educational Materials- development, gathering, preparation, and publishing (where applicable)
- Presentation of Course Content
- Event Quality
- Development and Administration of Individual Event Evaluation Plans
- Communication with CPE Office- including filling out the Event Notification Form and the Event Report Form
- Distribution of Event Promotion and Marketing Materials (This may be handled by an event service for larger events.)

#### CPE Office Services

- Long Range Event Forecasting
- Event Planning Assistance
- Promotion of event on CPE Event Calendar (web-based) and assistance with other marketing and promotion where appropriate
- Liaise with Conference Services, the Western Forestry and Conservation Association, and/or other service provider- the CPE office will help the Event Leader coordinate logistics using a service who is capable of handling large events (>50 participants). These service providers can

help with website development, registration management, marketing, paying vendors, and coordinating other logistics.

- Liaise with the Professional & Continuing Education (PACE) Office at the University level for course development when appropriate
- Registration Management- only for small events (<50 participants)
- Professional Certification and Continuing Education Credit Allocation
- Annual Program Reporting

#### Shared Responsibilities

- Event Forecasting- concept, need, demand, timing
- Event Proposal Development
- Event Budget Development

**NOTE:** *Costs for printing, preparing, and organizing workshop materials should NOT fall on faculty department offices. If faculty will need assistance with materials, the cost for that should be written into the budget and funds allocated appropriately.*

#### **Guidelines for Use of CoF Facilities for Continuing & Professional Education Events**

Any and all CPE events that take place in the College of Forestry need to adhere to the following guidelines:

- CoF facilities (including, but not limited to, rooms in Peavy or Richardson Hall, or field sites in the College Forests) use must be scheduled by an authorized representative of the CoF. Use of CoF facilities may be subject to charges for use of equipment, IT assistance, room set-up or clean up. Contact the CPE Program Coordinator to determine who best to contact for reservations.
- Printed materials (such as, but not limited to, notebooks or handouts) provided to program participants should include an acknowledgement of the use of the CoF facilities and needs to include an image of the OSU logo when appropriate. Logos can be downloaded at the [OSU Brand Identity Website](#).
- If the Event Leader is not current faculty or staff of the CoF, or is representing a private entity, a CoF representative should be (as their schedule allows) given a few moments on the agenda to introduce themselves and the College.
- All events that happen in CoF facilities are **required** to provide metrics to the CPE office. The [Event Notification Form](#) is to be filled out when the event is scheduled. The information on this form will be added to the [CPE Event Calendar](#). And, after the event has taken place, the [Event Report Form](#) should be filled out. This information will be used in the yearly reporting required by the Dean's Office in the CoF. Please note that this also pertains to events that may happen at a venue outside of the CoF, but still involve CoF faculty. We are attempting to record and collect metrics on any and all CPE events involving our college for end of year reporting.

#### **Continuing & Professional Education Event Proposals**

Continuing and Professional Education events 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 Office 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 office, each event requires an Event Leader who will work directly with the CPE Office 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** (see guidelines outlined above). See the CPE website's [Faculty and Staff page](#) for applicable links and forms.

### **Continuing & Professional Education Event Budgeting**

The CPE Office can provide assistance in budget development, especially for logistical services and arrangements. Continuing and Professional Education budgeting is guided by the necessity of establishing participants fees at a level that affords the organizers full cost-recovery. This includes recovery of costs associated with:

- Faculty and Staff time and effort
- Access to facilities, venues, and equipment (as necessary)
- 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 and maintenance
- Administrative Overhead payable to the University
- Other

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 ([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 Heads and such arrangements will comply with all University policies. Please note that the CPE Office does not *provide* funding to put on CPE events, but would be happy to work with faculty to locate and/or apply for funding.

### **Quality Control and Event Evaluation**

Faculty and staff of the CoF are responsible for developing and delivering a high-quality educational experience for any audience. The CPE Office requires that CPE events are 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 [Faculty & Staff Info page](#) of the CPE website.

### **Event Cancellation**

The CPE Office does not have any specific rules regarding event cancellation. It is strongly recommended that each Event Leader provide all registered participants with a written policy regarding event cancellation. This 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).

### **Financial Administration**

By law, program billings and fee collections must be done through bonded financial offices. The CPE Office cooperates with the CoF 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 CoF.

Although continuing education budgeting is based on full cost-recovery, there are instances when the program revenue does not cover the costs associated with putting on the event. 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. OSU, CoF, or any department in the CoF is not responsible for losses incurred if the Event Leader is not a current faculty or staff member of OSU.

There may also be instances in which a program has a gain. Most commonly, these instances result from higher enrollment than originally forecast, or expenditures below those initially budgeted. Excess program revenue from CPE events 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). Other arrangements may be made for excess program revenue on a case-by-case basis.

### **Approval:**



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Thomas Maness

Cheryl Ramberg-Ford and Allyn C. Ford Dean

06/19/2015

Date