

NAMSS EDUCATION POLICIES AND PROCEDURES

POLICY NAME: Instructor Selection

Number: Education 1000.10

Effective Date: 12.18.08

POLICY STATEMENT:

It shall be the responsibility of the Subject Matter Expert (SME) Subcommittee to select qualified instructors in support of NAMSS' educational programs.

PURPOSE:

To enable NAMSS to recruit and retain qualified instructors and to outline instructor expectations.

PROCEDURE:

Student Instructor Application Process

- 1) The process of recruitment and selection shall include the following:
 - a. Candidates must complete an application form to include:
 - i. Current Curriculum Vitae outlining the applicant's accomplishments in the medical services field.
 - ii. Listing of speaking engagements and evaluation summary for the previous 12-24 months.
 - iii. Candidates must provide verified documentation of recent teaching/speaking experience.
 - b. Candidates must be currently working in the medical services profession.
 - c. Candidates must be current NAMSS members in good standing.
 - d. Candidates must not currently be serving as a NAMSS Board Member, Committee Member, Taskforce Member, or in any other volunteer capacity at the national, regional, or state level.
 - i. *Instructors approved prior to September 2018 are grandfathered in.
 - ii. If an applicant is a volunteer upon applying, the applicant can finish out their current term prior to becoming an instructor.
 - e. Preferred candidates should have recent public speaking experience, e.g., at NAMSS Annual Conferences, state conferences or other speaking venues, addressing credentialing and other medical services professionals and healthcare related topics.
 - f. Candidates must have current NAMSS certification as a CPMSM or CPCS, preferably both.
 - g. It is recommended that a candidate submit a short video clip of a teaching/speaking experience.
 - h. Candidates must adhere to the NAMSS Code of Ethics, represent NAMSS positively in all public forums, and be an overall ambassador of the NAMSS education program.

SME Subcommittee Student Instructor Review and Approval Process

- 1) Process to be used by the SME Subcommittee when considering student instructors shall include:
 - a. Review of applications to determine all requirements have been met; and
 - b. Evaluation of data submitted by each applicant.
- 2) Upon acceptance into the program:
 - a. Student Instructors:
 - i. Must attend the next available Training of Trainers workshop after their acceptance into the program
 - ii. Must teach a NAMSS course within 18 months of their attendance at the workshop and receive an average evaluation score of 4.25 or higher on a 5.0 scale for the course taught and receive full recommendation from the NAMSS instructor(s) in order to be considered as a full instructor by the SME Subcommittee. Recommendation from NAMSS instructor(s) will remain confidential.

After the SME Subcommittee reviews the evaluation scores and the recommendations, a decision will be made as to whether full instructorship will be granted. The student instructor will be notified of the SME Subcommittee's decision in writing by the Chair of the SME Subcommittee.

Full Instructor Requirements

- 1) Upon approval as a full instructor:
 - a. Instructors must provide a new Conflict of Interest (COI) form each year.
 - i. Should information within this form change at any time, to include employment status, speaking opportunities, etc., the instructor must notify NAMSS within 30 days of the change. Conflicts of Interest for instructors are at the discretion of the NAMSS Professional Development Council.
 - b. Instructors must sign an instructor agreement annually, as provided by the NAMSS staff team.
 - i. Failure to sign an instructor agreement will void any current course assignments until the agreement is received.
 - c. Instructors must teach a minimum of one NAMSS course each year and consistently receive average participant evaluation scores of 4.25 or higher.
 - d. Instructors must currently be working in the medical services profession. Consultants are considered active in the profession. Should an instructor retire or change careers mid-year, the instructor must notify NAMSS of this career change within 30 days.
 - i. Any instructor with a change of employment status that results in no longer being active within the medical services profession must provide an updated Conflict of Interest form. Assuming there are no new conflicts, the instructor is able to complete their current year assignments; however, they are ineligible to return for the following calendar year.
 - e. Instructors must be a current NAMSS member in good standing.
 - f. Instructors must not currently be serving as a NAMSS Board Member, Committee Member, Taskforce Member, or in any other volunteer capacity at the national, regional, or state level.
 - g. Instructors must maintain CPCS and/or CPMSM certifications.
 - i. Should an instructor lose their certification at any point, they are not eligible to teach certification preparation courses effective immediately, until their certification status is restored.
 - h. Instructors must adhere to the NAMSS Code of Ethics, represent NAMSS positively in all public forums, and be an overall ambassador of the NAMSS education program.
- 2) Should an instructor wish to stop teaching for NAMSS, notice must be provided in writing to NAMSS staff and provide a minimum of 60 days of notice for any affected courses.
 - a. Failure to provide such notice will result in the individual being ineligible to return as an instructor in the future.

Student and Full Instructor Expectations:

- 1) When teaching for NAMSS, Instructors shall:
 - a. Be an advocate for NAMSS and overall ambassador of the NAMSS education program;
 - b. Refrain from making disparaging comments about course content, NAMSS, NAMSS staff, NAMSS leadership and other faculty in any public setting;
 - c. Refrain from marketing their personal business interests when teaching a NAMSS course; refrain from teaching programs that directly compete with NAMSS courses
 - d. Refrain from teaching programs that directly compete with NAMSS courses or speaking independently on topics that directly compete with a NAMSS educational course or program offering;
 - e. Submit a conflict of interest form to the SME Subcommittee for all speaking requests which must be approved prior to accepting speaking invitations.
 - f. Promptly communicate concerns or issues with content or processes directly with NAMSS staff;
 - g. Dress in appropriate business attire;
 - h. Adhere to all responsibilities outlined in Memorandum of Understanding (MOUs) or other education agreements with NAMSS;
 - i. Adhere to the NAMSS Code of Professional Conduct;
 - j. Refrain from using his/her NAMSS instructor title or access to NAMSS instructor materials for their personal gain or benefit professionally or financially.

NAMSS Guidelines

- 1) Instructors can expect NAMSS to do the following:
 - a. Make teaching assignments for courses and notify instructors at least 60 days in advance of the course (90 days if possible);
 - b. Provide Instructor Agreements (MOUs) at least 60 days in advance of the course (90 days if possible);
 - c. Provide materials for courses being taught at least 30 days prior to the activity (90 days if possible);
 - d. Provide a list of participants at least one week prior to the activity (if registration is being done through NAMSS);
 - e. Provide instructors with timely course evaluation data (within 30 days of the event);
 - f. Process expense reports within three weeks of receipt;
 - g. Decision to cancel course for lack of participants will be made as early as possible; and
 - h. Will facilitate a conference call with all instructors to review issues and ideas quarterly.

Originating Workgroup or Committee	
Bylaws And Other References	
NAMSS Bylaws	
Pertinent documents or other policy/procedure	
Communication Methodology	

Amended Date	Bylaws Committee Review Date	Board Approval Date
12/2010		1/21/2011
4/18/2016		5/19/2016
8/4/2016		11/14/2016
9/14/18		1/25/18
12/13/19		12/19/19
10/16/2023		12/6/2023

POLICY NAME: Instructor Evaluations**Number:** Education 1000.20**Effective Date:** 12.18.2008**POLICY STATEMENT:**

It shall be the responsibility of the Subject Matter Expert (SME) Subcommittee to provide, on an ongoing basis, evaluation of the NAMSS instructors, to ensure NAMSS standards are being met.

PURPOSE:

To provide high quality instructors, who will act as NAMSS' representatives and who are able to teach NAMSS educational material in the manner in which NAMSS requires it to be taught.

PROCEDURE:

- 1) All instructors will be required to receive average evaluation ratings of at least 4.25 on a 5.0 point rating scale, at all courses taught.
- 2) Instructors will be provided with a summary of their participant evaluations, along with the average evaluation score, within 30 days after each course.
- 3) Instructors will be reviewed at least once per year by members of the SME Subcommittee via a scoring rubric developed by the SME Subcommittee. The rubric will score independent instructors in (5) categories: Attire, Etiquette, Professionalism, Subject Matter Expertise, and Communication. In addition to being scored on a 1-5 scale, subcommittee members will provide comments and feedback related to instructor expectations as outlined in the policy: Education 1000.10. Rubric related feedback will be provided to the instructors alongside the participant evaluations, within 30 days of course completion.
 - Should an instructor score a 4 or 5 in any given category, no action will be taken.
 - Should an instructor score a 3 in any given category, the instructor will receive a coaching call from a member of the SME Subcommittee and will be re-evaluated in their immediate next course by a second member of the subcommittee.
 - Should an instructor score a 1 or 2 in any given category, the SME Subcommittee will discuss whether they are able to offer guidance or assist with performance improvement activities with the instructor. A formal vote will be required should it be decided the instructor is no longer a good fit based on subcommittee member feedback. Should the subcommittee vote to retain the instructor, the instructor will be required to go through coaching both with a SME Subcommittee member and an independent instructor prior to independently teaching their next course.
- 4) The SME Subcommittee shall review the NAMSS instructor roster on an annual basis, in December, taking into consideration courses taught by each instructor, participant evaluation scores, and SME Subcommittee audit scores. Instructors that do not meet the minimum criteria will be contacted by the Chair of the SME Subcommittee to inquire of continued interest in remaining a NAMSS instructor. On a finding of good cause, as determined by the SME Subcommittee via a majority vote, the Chair may allow the instructor to continue for an additional one year at which time the instructor will be re-evaluated for continued participation.

- 5) NAMSS Executive Office staff will provide an evaluation summary of programs presented by each instructor to the SME Subcommittee to determine any changes to the NAMSS instructor roster.
- 6) Instructors who are removed from the NAMSS instructor program may be reconsidered in two years, but they will be required to successfully complete student instructor training.
- 7) Instructors taking a leave of absence to serve as a NAMSS Board Member or Committee Chair, or in another volunteer position, upon their return need to demonstrate that they meet the criteria to serve as a Student Instructor. They will not be required to participate in the Student Instructor Training Program; however, participation is strongly encouraged.

Originating Workgroup or Committee		
Bylaws And Other References		
NAMSS Bylaws		
Pertinent documents or other policy/procedure		
Communication Methodology		
Amended Date	Bylaws Committee Review Date	Board Approval Date
12/2010		1/21/2011
4/18/2016		5/19/2016
		11/14/2016
10/23/17		1/25/18
10/4/2023		12/6/2023

POLICY NAME: Instructor Reimbursement

Number: Education 1000.30

Effective Date: 12.18.2008

POLICY STATEMENT:

It shall be the responsibility of the Subject Matter Expert (SME) Subcommittee to provide a method for reimbursing reasonable and documented expenses to NAMSS instructors when they teach courses at NAMSS programs.

PURPOSE:

To reimburse instructors for their services to NAMSS.

PROCEDURE:

- 1) NAMSS will reimburse instructors for reasonable travel, transportation, meals and incidentals for serving as an instructor for a NAMSS live course. The U.S. General Services Administration (GSA) per diem rates which are calculated based on location and the NAMSS/SmithBucklin reimbursement policies will be used as guidelines.
 - a) Instructor shall make own travel arrangements, as far in advance as possible, to receive the best rate. Airfare must be coach travel through the NAMSS travel service and instructors must exercise due diligence when selecting airline and flight times to obtain the best value.
- 2) Instructors will be responsible for completing a travel/expense reimbursement form, provided by NAMSS, for all reimbursable expenses according to NAMSS official travel policy. Receipts shall be attached to the expense report. An original expense form and original receipts are required by NAMSS finance department. Reimbursement forms must be submitted to NAMSS within 30 days following the event for which reimbursement is being requested.
- 3) NAMSS will provide honoraria as agreed to following instruction of a course.
- 4) Student instructors will receive expense reimbursement but not honoraria.

Originating Workgroup or Committee		SME Subcommittee
Bylaws And Other References		
NAMSS Bylaws		
Pertinent documents or other		
Communication Methodology		Will be communicated in all instructor contracts and posted in the Education Policies File, as well as on the NAMSS website
Amended Date	Bylaws Committee Review Date	Board Approval Date
12/18/08		
12/31/2010		1/21/2011
4/18/2016		5/19/2016
8/4/2016		11/14/2016
10/4/2023		12/6/2023

POLICY NAME: Granting Continuing Education Credits

Number: Education 1000.40
Effective Date: 12.18.2008

POLICY STATEMENT:

It shall be the responsibility of the Education Committee to grant continuing education credits for educational activities outside the realm of traditional live or online programs.

PURPOSE:

To establish criteria for NAMSS members to obtain NAMSS-approved Continuing Education Credits (CECs) through non-traditional methods.

DEFINITION(S):

- CE: Continuing Education
- CEC: Continuing Education Credit

Awarding CECs for NAMSS Annual Conference Recordings

PROCEDURE:

- 1) The Education Committee will work directly with the Conference Planning Chairperson to identify conference programs to grant CECs by July 1 of each year.
- 2) Selected speakers for each Annual Conference will be requested to submit ten (10) questions and answers they will include in their presentation. Questions and answers should be supplied to the Conference Planning Chair no later than July 1st of the conference year.
- 3) In the event that a speaker is not willing to submit the requested ten (10) questions and answers, the Conference Planning Chair may request that a member of the Conference Committee or Education Committee write the questions.
- 4) The Education Committee will review the ten (10) questions and answers and select ten (10) from the fifteen to be included in the speaker's presentation as part of the CEC quizzes that can be purchased with the conference recording for an additional charge.
- 5) All questions will be multiple choice and/or true/false.
- 6) The Education Committee will review the conference recording to verify that all quiz questions and answers have been addressed and are clear in the presentation.
- 7) The NAMSS Executive Office will design the format for the quizzes. The quizzes will be placed into the NAMSS Online Store.
- 8) Individuals who achieve a passing score of 80% or higher will be granted one and one half (1.5) CEC for each quiz as per their designation at the Annual Conference. No more than six (6) CE quizzes will be released at any one time throughout the year.
- 9) Those persons who attended the Annual Conference in person are eligible for no more than ten (10) additional CE credits by taking CE quizzes.

- 10) All audio conference recordings and quizzes will be reviewed on an annual basis, to determine if content remains current. If so, they will continue to be offered to NAMSS members for an additional year.

CECs for Authorship of Articles Selected for Publication in *Synergy*

PROCEDURE:

A. Qualifying Articles

- 1) The article must be industry-related and must be at least 1500 words in length.
- 2) Authors must be CPMSM and/or CPCS certified or other recognized authority in the field as determined by the Education Committee.
- 3) Author must develop a ten (10) question quiz relating to the article and submit this along with the article to NAMSS. The quiz will be reviewed/revised by the Education Committee or designees.

B. Review and Selection Process

- 1) Selection of articles for CEC publication is at the discretion of the Education Committee working in coordination with the Editorial Team of *Synergy*.
- 2) Articles that meet the aforementioned criteria shall be sent to the NAMSS Education Department with a written request for CECs.
- 3) The Education Committee shall review articles for relevancy, accuracy, and overall interest to NAMSS members. The Education Committee may request additional review by an outside subject matter expert if needed.
- 4) As many as three (3) CECs will be granted to the author for each accepted article.
- 5) Article must be based on the needs of the NAMSS membership as evidenced through member program evaluations; input from questionnaires; perceived needs based on changes in the healthcare field; etc.
- 6) It shall be the responsibility of the Education Director to notify the author of acceptance of the article and the number of CECs awarded in writing.
- 7) Should it be decided that an article submitted for consideration of CECs does not meet the criteria for awarding NAMSS approved CECs, it shall be the responsibility of the Education Director to notify the author of the article in writing.

Awarding CECs for Webinars, pre-recorded NAMSS events that have been approved for NAMSS CEC accreditation and *Synergy* Quizzes

PROCEDURE:

Learning that takes place in a group setting requires a CE application and Sign-In Sheet. Learning that takes place individually requires an assessment tool to map back to the learning objectives such as a quiz.

- 1) One CE certificate for the previously accredited number of hours will be issued to the applying entity. The certificate will be reproduced and disbursed to each registrant, in the registrant's name.

- 2) CE Certificates will be sent to the person submitting the CE request.
- 3) *Webinars*: If there are multiple participants at one location who did not pre-register, a sign-in sheet should be provided for all attendees to sign. The sign-in sheet must be sent to the NAMSS Executive Office along with a fee (as determined by the NAMSS Board) for each additional CE certificate requested. This fee shall be waived if the presentation is part of an official educational meeting of a state or local chapter of NAMSS and the state affiliate or chapter has submitted a CE Accreditation Application Form.
- 4) *If a portion of a program is pre-recorded*, and said program and instructor have already been approved by NAMSS, an organization may substitute this pre-recorded content at its conference in lieu of a live speaker. A sign-in sheet should be provided for all attendees to sign. The sign-in sheet must be sent to the NAMSS Executive Office along with a fee (as determined by the NAMSS Board) for each additional CE certificate requested.
- 5) Online CE opportunities provided for individuals must include an assessment tool mapping back to the goals and objectives in order to prove comprehension of the material such as a quiz. Quizzes must provide a minimum of ten (10) true/false and/or multiple choice questions to the NAMSS office for review, along with its application for CE accreditation. Participants must successfully complete the quiz with a score of 80% or higher and submit to the NAMSS office (or offering entity) to obtain CE credit.

Awarding Alternate Continuing Education Credits (CECs)

PROCEDURE:

The following activities have been identified and are acceptable to earn alternate continuing education credits.

Subject Matter Expert - a current certificant may earn alternate credit for subject matter expertise provided to support a NAMSS committee or commission. Service hours will be verified by the administrative office in consultation with the committee chair. Paid subject matter experts are NOT eligible for credit. **(NAMSS approved)**

Item Writing – A current certificant may earn alternate credit hours by participating in an item writing workshop. One hour of credit is awarded for each hour of participation. **(NAMSS approved)**

Teaching/Speaking – credit will be granted for development/delivery of a presentation at NAMSS Accredited programs at the rate of 2 credits per hour. **(NAMSS approved)**

Volunteer Service – credit will be granted for volunteer service at the rate of 2 credits per elected/appointed board or standing committee position on the NAMSS national level and 1 credit per elected/appointed board or standing committee position on the state level per year. **(NAMSS approved)**

Non-NAMSS Accredited Educational Programs – credit will be granted for attendance at non-NAMSS accredited industry related activities such as conferences, seminars, workshops, training sessions, teleconferences, webinars, or online coursework. One credit will be awarded for each 50 minutes of attendance.

College/University Courses – credit will be granted for successful completion of a college or university course in the medical services industry topic area. Credit will also be granted for teaching college/university course, in the medical services industry topic area. One course

may be used per recertification cycle. A three-credit course is equivalent to 12 continuing education credits.

Published Articles or Books – credit will be granted for articles published in *Synergy* **(NAMSS approved as outlined in policy 1000.40)** or books on a medical services industry-related topic. Up to three (3) credits will be awarded for each published article.

Originating Workgroup or Committee		Education Committee
Bylaws And Other References		
NAMSS Bylaws		
Pertinent documents or other policy/procedure		
Communication Methodology		Will be presented in all relevant applications as well as posted on the NAMSS website and recorded in the Educational Policies File.
Amended Date	Bylaws Committee Review Date	Board Approval Date
12/18/08		
12/2010		1/21/2011
		5/19/2016
12/13/19		12/19/19

POLICY NAME: Application for Approval of Continuing Education Credits (CEC)

Number: Education 1000.50

Effective Date: 12.18.2008

POLICY STATEMENT:

It shall be the responsibility of the Accreditation Subcommittee to grant continuing education credits for educational programs meeting the established criteria as defined in the NAMSS Program Accreditation Guidelines.

PURPOSE

To grant NAMSS-approved credits to organizations offering continuing education activities.

PROCEDURE:

On a prospective basis, at least 30 days prior to the activity date, the applicant shall submit a completed application form requesting approval for Continuing Education Credits to the NAMSS Executive Office. Applications for Continuing Education Credits must be submitted to the NAMSS Executive office via the online submission process and must be accompanied by the applicable fee. **Applications will not be accepted within 29 days of a program.**

- 1) The NAMSS Executive Office will use the NAMSS Program Accreditation Guidelines to determine whether or not submitted educational activities should be awarded NAMSS continuing education credits.
- 2) The categories of NAMSS Continuing Education Credits (CECs) are:
 - a. **NAMSS approved credits:** NAMSS approved credits are activities or events in which the sponsoring organization has submitted a formal application to NAMSS to be approved for NAMSS credit. NAMSS approved credits must meet all eligibility guidelines stated within this document and be approved by the NAMSS Accreditation Subcommittee. Once approved, the sponsoring organization will receive exact language that must be used when promoting programs offerings NAMSS approved credits.
 - b. **Non-NAMSS approved credits:** Vendor-specific technology training, attendance, attendance at department, medical staff, or other work-related meetings, stress reduction or other similar types of personal improvement activities, networking receptions or viewing equipment at trade shows/exhibits are not eligible to be NAMSS approved and not eligible for CECs.

- 3) CECs cannot be advertised by the sponsoring organization until approved. This includes marketing materials and other course collateral. Please note phrasing such as, "This program has been submitted to NAMSS for approval" is not permitted. Once approved, NAMSS will provide exact language that must be used when promoting programs offering NAMSS credits. When promoting non-NAMSS approved programs, the sponsoring organization may not reference NAMSS credits in any promotional materials.
- 4) Applications must be submitted by the sponsoring organization with correct fee type. A sponsoring organization is identified as the organization which:
 - a. Is hosting the program in-person or on a virtual platform.
 - b. Is responsible for the content, either serving as the speaker or has sourced and hired an outside speaker.
 - c. Is collecting all registration information including fees when applicable.
 - d. Is sending all promotional materials*.
 - e. Is distributing NAMSS-approved CEC certificates.
 - f. Is the primary contact for all questions related to the program content in the event follow-up is needed from NAMSS.

**Cross-promotion is allowed by outside organizations with prior approval from NAMSS. If outside organizations will be helping promote your program, please list them and their relationship with your organization in your application.*

Sponsoring organization types are below:

- g. State chapters
- h. Non-profit (not-for-profit hospitals and non-profit organizations)
- i. For-profit (corporations, vendors, law firms, etc.)

Any organization found to be submitted under the incorrect sponsoring organization type will be charged the difference in rate before approval is granted.

- 5) CECs will not be granted for programming that directly competes with NAMSS educational offerings as determined by the Accreditation Subcommittee.
- 6) Unless otherwise noted, NAMSS CEC approval is valid for a single program in a calendar year.
 - a. Programs containing multiple sessions may be submitted (ex: a conference over multiple days or a webinar series over multiple weeks/months) as long as registration is comprehensive of the full program and attendance assumes completion of the entire program.
 - b. Programs consisting of multiple sessions that are not part of one comprehensive event must be submitted individually to allow for individual CECs to be awarded (ex: a series of six lectures where attendees can choose which to attend).
- 7) Distance learning programs that have been approved by NAMSS for CECs and are offered to participants on a continuous basis are not subject to the aforementioned time limit. The Accreditation Subcommittee shall review approval of these CECs for these programs on an annual basis.
- 8) The applicant shall be notified of the NAMSS Executive Office's determination in writing and sent certificates for distribution to program attendees/registrants within 30 days of submitting the application.

- 9) The NAMSS Executive Office will clarify any applications that do not appear to meet the Guidelines with the Accreditation Subcommittee Chair or designee.
- 10) In cases where credit is denied, the applicant has the right to appeal the adverse decision directly to the Accreditation Subcommittee. The appeal must be submitted in writing within 15 days of the adverse decision and must be accompanied by all relevant supporting information. The Accreditation Subcommittee shall review the appeal. The applicant shall be notified in writing within seven (7) business days of the decision on the appeal. Only one appeal on each adverse decision is permitted.
- 11) Any organization found to be promoting an activity in violation of any of the above guidelines, not abiding by these policies in good faith, or other ethical violations at the discretion of the Accreditation Subcommittee will be ineligible for future CEC approval for one year.
- 12) The National Association Medical Staff Services (NAMSS) is committed to enhancing the professional development of and recognition for professionals in the medical staff and credentialing services field. The NAMSS certification program establishes industry standards and serves as a comprehensive measure of knowledge in the field. The Certified Provider Credentialing Specialist (CPCS®) and Certified Professional Medical Services Management (CPMSM®) offered by NAMSS have met the rigorous requirements to become accredited by the National Commission for Certifying Agencies (NCCA). To safeguard the quality of these certifications, NAMSS will permit NAMSS-accredited education programs, and related instructional and marketing materials, to reference only acronyms and credentials that are also accredited by NCCA or a similar reputable national accreditation body, like the American National Standards Institute.

Originating Workgroup or Committee	Accreditation Subcommittee
Bylaws And Other References	
NAMSS Bylaws	
Pertinent documents or other policy/procedure	
Communication Methodology	Will be presented in all relevant applications as well as posted on the NAMSS website and recorded in the Educational Policies File.

Amended Date	Bylaws Committee Review Date	Board Approval Date
12/18/08		
12/2010		1/21/2011
9/14/18		5/19/2016
1/7/2021		1/28/2021
3/28/2023		5/22/2023

POLICY NAME: NAMSS' Sponsored Courses

Number: Education 1000.60

Effective Date: 12.18.2008

POLICY STATEMENT:

It shall be the responsibility of the Education Committee to outline procedures for individual states to hold NAMSS' educational programs, upon request.

PURPOSE:

To assist state affiliates and chapters with offering educational programming to their members.

PROCEDURE:

- 1) Education Committee will maintain courses and a fee structure which will be presented to the NAMSS Professional Development Council (PDC) and Board for approval. The fee structure will be based upon the specific course.
- 2) State leaders must submit an official course request form to be considered for hosting a NAMSS' sponsored course. The courses available and the applicable fees are published on the NAMSS website.
- 3) NAMSS Staff will secure speakers for the course(s) requested. NAMSS will then put the speaker(s) in contact with the state through a confirmation agreement letter sent to both parties. Speakers will be selected based on the following criteria:
 - a) speaker availability
 - b) feedback from attendee evaluations from speaker's last presentation of the course requested
 - c) specific speaker(s) requested by state
 - d) geographic proximity to course location (to mitigate travel costs)
- 4) A NAMSS agreement outlining the division of responsibilities will be included within each course request form to assist the state with planning the course(s), including:

Requesting State or Organization Responsibilities:

- 1) Contact the speaker(s) to discuss:
 - a) Honorarium
 - b) Location
 - c) Agenda
 - d) Audiovisual needs
 - e) Expense reimbursement (cannot exceed NAMSS policy on reimbursement)
 - f) Hotel accommodations
 - g) Travel arrangements
- 2) All site logistics.
- 3) All A/V logistics including speaker laptop and LCD projector (work with the speaker(s) to best identify their audiovisual needs).
- 4) Submit request for materials to the NAMSS Office no later than four weeks

prior to the start date of your educational activity.

- 5) Expense reimbursement directly to instructor(s).
- 6) (Optional) Provide attendees and instructors with a roster of all participants to promote networking and the ability to remain in touch. (Include: Name, state where they are from, and email address).

NAMSS Responsibilities:

- 1) Course books and materials to sponsoring organization (ship appropriate amount based upon request).
- 2) Electronic versions of the entire course (text and PowerPoint presentation) sent to instructor(s).
- 3) Invoice sponsoring organization for licensing fees, books and materials ordered.

Originating Workgroup or Committee	Education Committee
Bylaws And Other References	
NAMSS Bylaws	
Pertinent documents or other policy/procedure	
Communication Methodology	Will be communicated in all instructor contracts and posted in the Education Policies File, as well as on the NAMSS website

Amended Date	Bylaws Committee Review Date	Board Approval Date
12/18/08		
12/2010		1/21/2011
		5/19/2016
8/4/2016		11/14/2016
11/13/2023		12/6/2023

POLICY STATEMENT:

It shall be the responsibility of the Education Committee to develop and make available online learning courses to provide educational opportunities for interested individuals. These online learning courses shall also provide continuing education credits upon successful completion of the course.

PURPOSE:

The purpose of this policy is to document the process for implementing online learning courses, including enrollment and cancellation.

PROCEDURE:

A. Development of Online Learning Courses

- 1) NAMSS shall develop online learning courses based on member needs identified through surveys, evaluations, or other forms of member feedback.
- 2) NAMSS may work with an instructional designer to develop/repurpose course content into the appropriate online learning format.
- 3) The draft course shall be reviewed by the Education Committee, or designee(s), and beta-tested prior to release.
- 4) The Education Committee shall determine the fee and continuing education credits applicable to each course. Course fees shall be reviewed at least annually and revised as appropriate.
- 5) On at least an annual basis, each online learning course shall be reviewed by the Education Committee, or designee(s), to determine need to update content as appropriate.

B. Student Enrollment

- 1) Users shall purchase the online learning courses through the NAMSS website.
- 2) All course fees are due in advance of a user beginning an online learning course.
- 3) Successful completion of the course quiz is required in order to receive the applicable continuing education credits. A minimum passing score of 80% is required. Users may take the quiz as many times as needed to achieve a passing score.

C. Cancellation/Reimbursement

All requests for cancellations and refunds must be made in writing and received within 10 business days of date of purchase. No refunds will be issued after that date. If 15% or less of the course has been viewed a refund less a 15% processing fee will be considered. No refund will be made if more than 15% of the course has been viewed.

Originating Workgroup or Committee	Education Committee
Bylaws And Other References	
NAMSS Bylaws	
Pertinent documents or other policy/procedure	
Communication Methodology	Will be communicated in all instructor contracts and posted in the Education Policies File, as well as on the NAMSS website

Amended Date	Bylaws Committee Review Date	Board Approval Date
12/18/08		
12/2010		1/21/2011
1/21/2011		5/19/2016

POLICY NAME: Instructor Honoraria

Number: Education 1000.80

Effective Date: 5.19.2016

POLICY STATEMENT:

The Subject Matter Expert (SME) Subcommittee will set and standardize instructor payment based on length of class, number of attendees, and how many instructors are contracted per course.

PURPOSE:

To provide a standard policy for reference when contracting with instructors.

PROCEDURE:

- 1) Instructors of two-day programs will receive the following:
 - a. When teaching 25 or fewer students, instructors will teach alone and receive \$3000.
 - b. When teaching more than 25 students (26+), instructors will co-teach with another instructor and each will receive \$1750
 - c. When extenuating circumstances arise and NAMSS is unable to contract a second instructor for courses over 25 students (26+), a single instructor will receive \$3000.
- 2) Instructors of one-day programs will receive the following:
 - a. When teaching 25 or fewer students, instructors will teach alone and receive \$1750
 - b. When teaching more than 25 students (26+), instructors will co-teach with another instructor and each will receive \$1250.
 - c. When extenuating circumstances arise and NAMSS is unable to contract a second instructor for courses over 25 students (26+), a single instructor will receive \$1750
- 3) In the event that NAMSS provides a three-day course, instructors will receive an additional \$500 per session.
- 4) When teaching at NAMSS Annual Conference, NAMSS will book two speakers regardless of class size and adhere to subpoint "b" above for honorarium structure. If enough instructors are not available, NAMSS will default to option "c" above.
- 5) This policy does not overwrite existing student-instructor payment policies.
- 6) All full instructors in good standing, who have taught at least one NAMSS sponsored course, or participated in writing curricula for NAMSS and are not teaching at the Annual Conference will be granted one full conference registration to be used at that year's Annual Conference. This offer is not transferrable nor can it be used from one year to the next. The NAMSS Board will review disbursements on an annual basis during the budget process.

Originating Workgroup or Committee	SME Subcommittee
Bylaws And Other References	
NAMSS Bylaws	
Pertinent documents or other policy/procedure	
Communication Methodology	Will be communicated to all instructors on quarterly call.

Amended Date	Bylaws Committee Review Date	Board Approval Date
9/14/18		11/14/2016
10/4/2023		12/6/2023

POLICY NAME: Instructor Placement

Number: Education 1000.90
Effective Date: 5.19.2016

POLICY STATEMENT:

The Subject Matter Expert (SME) Subcommittee will set and standardize new and current instructor training and competencies for courses for which the instructor is able to teach.

PURPOSE:

To provide a standard policy for reference when accepting new instructors, and outlining how current instructors can expand the courses they are able to teach.

PROCEDURE:

- 1) New instructors:
 - a. Must attend the Training of Trainers workshop where they will be trained to teach a NAMSS course.
 - b. Following the Training of Trainers, new instructors must student-teach the course taught at the workshop with an experienced instructor within the next 18 months. NAMSS Executive Office shall coordinate with new and experienced instructors on upcoming available courses. If this requirement is not met, then new instructors can request an extension from the SME Subcommittee.
 - c. If student instructors elect to first teach a course not taught at the workshop, they will be required to audit the course and then student-teach with an experienced instructor within the next 18 months.
 - d. Following successful student teaching experiences, with an average rating of 4.25 or higher on the instructor evaluations, new instructors may request to start teaching independently each course for which they have successfully student-taught.
 - i. If this requirement is not met, new instructors will be required to audit the course and will then have one additional opportunity to teach the course in order to achieve an average rating of 4.25 or higher. Upon completion of this additional instruction, the education committee will review the results and make a final determination on whether the instructor will be assigned to teach the course independently.
 - e. Student instructors will receive compensation for expenses incurred while teaching a course but will not receive an honorarium until they have been approved to teach a course independently.
- 2) Experienced Instructors interested in teaching a new course:
 - a. Instructors interested in teaching a new course shall complete an "Additional Teaching Course Request" form. This form shall be submitted to the SME Subcommittee via the NAMSS Executive Office for review and approval. If approved, the Instructor shall be notified and provided an outline of the next steps.
 - b. In order to teach a new NAMSS course, current instructors will be required to 'audit' the course prior to being scheduled to teach the course. This means instructors will sit in the back of the room during the course and follow along with the instructor using the Facilitator Guide.
 - i. Instructors are required to audit the entirety of the course.

- ii. Instructors will not be required to register or pay for the course but will be responsible for their own expenses.
 - c. Following a course audit, instructors will co-teach the course at least once with an experienced instructor.
 - i. Instructors will receive expense reimbursement for their first co-teaching experience but no honoraria.
 - ii. If the instructor receives an average evaluation ranking of 4.25 or higher they may request to teach the course independently and receive full compensation in accordance with NAMSS instructor honorarium policy.
 - iii. If the instructor receives an average evaluation ranking lower than 4.25 they will not be qualified to teach that course.
 - 1. If the instructor is not qualified to teach the course, they may audit the course again and co-teach at their own expense. All evaluations will be reviewed by the Education Committee, who will make a final determination on whether the instructor will be assigned to teach the course independently.
- 3) The SME Subcommittee will review instructor evaluations following each course that they teach in accordance with current NAMSS policies.

Originating Workgroup or Committee	SME Subcommittee
Bylaws And Other References	
NAMSS Bylaws	
Pertinent documents or other policy/procedure	
Communication Methodology	Will be communicated to all instructors on quarterly call.

Amended Date	Bylaws Committee Review Date	Board Approval Date
8/4/2016		11/14/2016
9/14/18		1/25/18
10/4/2023		12/6/2023

POLICY STATEMENT:

The Subject Matter Expert (SME) Subcommittee in collaboration with NAMSS staff will set and standardize the in- person course review process.

PURPOSE:

To provide a standard policy for reference when instructors teach a course and have feedback and updates to provide.

PROCEDURE:

- 1) Before teaching an in-person course, either at the NAMSS Annual Conference or a state-run course, instructors will have at least 30 days to review course materials.
 - a) Instructors have access to restricted pages of the NAMSS Connection Zone with the Facilitator Guide, Participant Guide and presentation slides for their event.
- 2) Instructors will be provided a change log prior to their teaching experience. Instructors will keep a log of any additional edits noted during the teaching of a course and send suggested changes **only** to Subject Matter Expert(s) and NAMSS Education Team at education@namss.org to include in future course updates.
- 3) Instructors and the NAMSS Executive Office staff will follow the Process Timeline for submitting changes and sending items back out to instructors for review. Subject Matter Expert(s) will incorporate edits to in-person courses in collaboration with NAMSS Executive Office at least twice annually, and at least 30 days before the Annual Conference.
 - a) All updates made to course materials will be shared with instructors following their implementation.
 - b) NAMSS instructors should review updates to confirm changes made within 30 days of receipt of communication.
- 4) All edits to the NAMSS courses must be approved by the NAMSS Courses Subcommittee prior to being integrated into the courses.

Originating Workgroup or Committee		SME Subcommittee
Bylaws And Other References		
NAMSS Bylaws		
Pertinent documents or other policy/procedure		
Communication Methodology		Will be communicated to all instructors on quarterly call.
Amended Date	Bylaws Committee Review Date	Board Approval Date
9/14/18		1/25/18
10/4/2023		12/6/2023