

# Guide to running a Continuing Education or Professional Development Short Course

## Why do it?

- Share your academic passion
- Earn money for the department to support other activity
- Meet a need for professional education in your field
- Bring a visiting academic to a larger audience
- Discuss an issue of public concern
- Disseminate research findings
- Create a new interest group

## Planning

All events need some planning. The main areas to consider are: venue, expected numbers, fees if any, promotion, funding or other support, and policy.

## Venue

Always use a university venue, unless there is a good reason not to. You may want to use a departmental room, booked through your department administrator. To book other university rooms contact [timetables@otago.ac.nz](mailto:timetables@otago.ac.nz) and allow at least a week days for this to be processed. You can apply for a waiver of room charges at the same time.

External venues are sometimes appropriate, but are often expensive. If applying for funding, the use of an external venue needs to be justified.

## How many people might attend?

Your best guess will guide your choice of venue. Ask your colleagues about how many people attended similar events in the past. If it's important to know numbers in advance of the event, you can ask people to register using the CE registration service. This service is free for events for which no charge applies.

## Do you want people to register?

Only ask people to register if you need to. Examples of when registration is useful:

- To plan catering
- To match venue size more accurately (such as when an important visitor is presenting or when rooms are expensive)
- If you want to communicate with participants prior to the event

## Registration service

CE Office provides a registration service. To access this service, contact [continuing.education@otago.ac.nz](mailto:continuing.education@otago.ac.nz)

### **Will you charge a fee?**

Most seminars are offered free of charge, while a fee is charged for most short courses. If you do want people to pay, it is better for them to pay in advance. This is best practice and allows payments to be receipted and refunded if necessary. It is **not** recommended that cash is collected at the door.

### **Payment service**

Continuing Education Office provides a registration and payment service with a \$35 set up fee (per event) and then \$5 per registration (which can be incorporated into the fee itself). Please discuss your needs with the CE office as there are a variety of options available.

### **How to calculate your fee**

It's a lot of work to organise and then deliver a course, so be realistic about fees. If it's too expensive nobody will come, too cheap and the course will not be viable.

Calculate the appropriate fee per person, based on expected number of participants, what is affordable, and to cover all costs (including GST and the service fees).

How much does it cost to put on this event?

Cost of:

venue

advertising estimates

speaker fee

catering

other speaker costs

equipment hire eg. AV equipment, microphones etc

**Total A**

plus profit (if desired)

plus 15% GST

plus CE fee

**Total B**

How many people do you expect? **Total C**

**Divide total B by total C = per person fee**

You can apply for CE funding to offset high costs. Requests will be assessed according to the criteria for the Continuing Education Fund.

## **Continuing Education Fund**

The purpose of the fund is to support continuing education activity which would otherwise not happen, normally awarding small grants of up to \$1000.

Applications are made using the application form with details of the event, a budget and departmental and divisional approval. The application must be submitted to the Summer School & Continuing Education Office by **5pm on the due date**. Applications are considered by a subcommittee of the SS&CE Board and assessed according to the criteria outlined in the fund guidelines. Decisions are usually communicated within two or three weeks of the due date.

**Funding Round due dates 2017:** 5pm on 31 March, 28 July and 3 November.

## **How to Apply to the Continuing Education Fund**

Read the Continuing Education Fund Guidelines before completing the application form.

Complete the Continuing Education Fund Application form and return it to the Continuing Education office before 5pm on the due date.

## **Promoting your event**

You are advised to promote your event through your own networks as much as possible, and to use your own lists and noticeboards also. We can prepare a poster for special events and will actively promote all CE activity on our website, Facebook page, and the University events page.

If you would like our assistance with preparing posters please contact us.

The Marketing Services team publish a weekly Open to the Public advertisement in Thursday's ODT to promote the upcoming open lectures, events, exhibitions and short course. If your event or course is open to the public and free, then it is possible to include it in this weekly advertisement. Please email the title, presenter, date, time, and venue to Lisa Vote at [advertising.marketing@otago.ac.nz](mailto:advertising.marketing@otago.ac.nz). The weekly submission deadline is 10am, every Monday morning. Space in this advertisement is limited, so the more notice you can provide the better.

## **Accommodation for course participants**

A separate accommodation fee may be charged for course participants where accommodation and/or meals are provided. This fee should include 15% GST.

Options include

The Executive Residence (see [www.otago.ac.nz/execres](http://www.otago.ac.nz/execres))

Residential colleges (see <http://www.otago.ac.nz/about/accommodation/>)

Arrangements can be made directly with accommodation providers.

## **Paying people**

Otago academics are not generally paid to deliver continuing education, this is considered community service. However an agreed fee can be paid to a visiting speaker. International speakers are normally treated as visiting academics and their contractual arrangements with the University managed through Human Resources. HR will send the letter of invitation, manage withholding tax and make the payment according to details provided on an HR approval form.

Please contact your HR Administrator for assistance and to obtain the appropriate request form. If you are unsure who this is, send an email to [hrservices@otago.ac.nz](mailto:hrservices@otago.ac.nz)

## **Policy**

All courses and events must adhere to University policy. The following policies should be made known to participants via a link to this website or by copying the following information about refunds and resolving problems into course materials.

## **Refunds**

Students who enrol in and pay for a course that they subsequently cannot attend will be entitled to a refund in accordance with university policy relating to short courses as follows:

- For withdrawal up to seven working days before course commencement, an administration fee of 10% will be retained
- For withdrawal less than seven working days before course commencement a refund of 50% will be made at the discretion of the Course or Programme Director
- Once a course has commenced, no refund will be given
- The university reserves the right to cancel a course due to insufficient enrolments or other unforeseen circumstances, in such cases fees will be refunded in full.

## **Guidelines for resolving problems**

The following principles and procedures have been adopted by the University for addressing academic concerns or grievances that a Continuing Education student may have relating to a short course, seminar, workshop or other similar event.

### **Principles**

- Matters should be notified and addressed quickly, fairly, and as close as possible to the point of origin. (This will usually be those directly involved in the delivery or organisation of the event.)
- The student may, with good reason, seek resolution of the matter at a higher level than that of the person/s most immediately involved.

## **Procedures**

**Step 1:** In the first instance the student should raise, discuss and seek resolution of the matter with the course facilitator/tutor

**Step 2:** If there is good reason for not raising the matter directly with the facilitator/tutor, or if the student is of the opinion that the matter has not been appropriately resolved at that level, then the student may request a meeting with the next level of management. This will vary, depending on the nature of the event and auspices under which it is being offered. In some instances the next level will be a Head of Department, in others a Programme Director. Information on the appropriate person to approach is available from the Director, Summer School & Continuing Education.

Both parties may invite a representative or support person to the meeting.

**Step 3:** If the matter remains unresolved after steps 1 and/or 2, then the student may refer it in writing to the level of Dean or Pro Vice Chancellor (PVC).

### **Checklist for setting up a course**

Establish the academic and financial viability of the course/event

Consider what support you need – funding, bookings, registrations and/or promotions

Estimate enrolments numbers and costs to determine an appropriate fee (see above “How to calculate the fee”)

### **For further advice and assistance contact Continuing Education**

[continuing.education@otago.ac.nz](mailto:continuing.education@otago.ac.nz)

Office Manager phone 03 479 9181

Director phone 03 479 5191