

UNIVERSITY RULE

11.99.99.M2 Continuing Education Activities Conducted by the University

Approved January 28, 1999

Revised July 1, 2008

Rule Statement

- Continuing education activities serve to transfer knowledge to the public and private sectors in a timely way and are consistent with Texas A&M University's land-grant mission. At the same time, such activities bring to the University a sense of the knowledge needs in those sectors and can stimulate valuable research.
- Institutional management of continuing education activities must provide for effective fulfillment of Texas A&M University's missions and obligations to the State of Texas. Continuing education activities should be consistent with the missions of the University and not produce conflicts of interest.
- In some instances, for statutory or accreditation reasons, University departments or colleges may be required to offer continuing education. In such cases, as in others, continuing education activity by a faculty or staff member may be viewed as part of the individual's responsibilities to the institution. Units required to offer continuing education should institute operational policies consistent with those outlined in this Rule.

Definitions

- Texas A&M University has developed the following definition for continuing education programs:

Professional development programs that do not provide academic credit, provided by Texas A&M University through seminars, conferences and workshops, targeted to individuals or groups that are external to Texas A&M University, for a fee. Continuing education units may be offered, but are not a required element.

Official Rule/ Responsibilities/ Process

1. STANDARDS FOR CONTINUING EDUCATION PROGRAMS

- 1.1 In order to ensure the programs delivered are of the highest quality, the following guidelines have been established for the development and delivery of continuing education programs.
 - 1.1.1 A needs assessment must be conducted to determine if a course offering is warranted.
 - 1.1.2 The financial viability of the proposed program must be evaluated. Analysis must be conducted to determine if the program is projected to be profitable (or break even).
 - 1.1.3 Course content and development must be consistent with the organization's mission and/or recognized area of expertise.
 - 1.1.4 Course learning objectives must be established and the target audience identified.
 - 1.1.5 Quality standards must be established to ensure the course is consistent with Texas A&M University standards for educational program development. Quality standards should mirror national standards where applicable.
 - 1.1.6 A systematic review process must be in place to ensure course quality and continuous improvement. Evaluation should be linked to objectives.
 - 1.1.7 A course marketing strategy should be developed with consideration of the following critical elements:
 - 1.1.7.1 Program content
 - 1.1.7.2 Applicable revenue/cost factors to determine the registration fee
 - 1.1.7.3 Advertising needs and means
 - 1.1.7.4 Program delivery
 - 1.1.8 Accounting processes consistent with System policies and regulations, University rules, and standard administrative procedures must be in place to ensure appropriate transaction processing and recording of revenues and expenditures.
 - 1.1.9 Reporting systems must be in place to provide information on course participation, course evaluation, and financial performance.

2. RESPONSIBILITY, APPROVAL AND ACCOUNTABILITY

- 2.1 Management and oversight of continuing education programs are the responsibilities of the appropriate dean or vice president.
- 2.2 Program approval
All continuing education programs must be approved in advance by the head of the administrative unit. An approval form is not required, but documentation of approval must be maintained.
- 2.3 Compliance with University-wide standards
All administrative units will be accountable for ensuring compliance with university-wide standards and/or development and administration of unit level processing standards which are consistent with University-wide standards as defined in Section 3.
- 2.4 Administrative Units will be required to establish and monitor control systems for continuing education programs. The Departmental Accounting Resource Center within Financial Management Operations is available to assist departments in developing control systems and control monitoring systems. The Office of University Risk and Compliance can also assist with developing and implementing control and monitoring systems. Comments related to educational and financial control outcomes should be included in the annual reports of continuing education activities.
- 2.5 As approved by the Dean (or other unit head), surplus funds generated from continuing education activities may be used for activities that support the academic and professional missions of the unit.

3. REQUIRED REPORTING OF ACTIVITIES

- 3.1 Administrative units should maintain sufficient program information to facilitate the creation of the report on distance education and continuing education courses submitted to the Board of Regents annually in November. In addition, before December of each year, administrative units will be required to provide the Executive Vice President for Academics and Provost a report of continuing education activities conducted during the prior fiscal year. The following elements should be included in the annual report ([see template](#)):
- 3.1.1 Course title
 - 3.1.2 Course description
 - 3.1.3 Number of courses taught
 - 3.1.4 Location of courses
 - 3.1.5 Number of participants
 - 3.1.6 Course revenues
 - 3.1.7 Course expenditures
 - 3.1.8 Surplus/(Deficit)
 - 3.1.9 Content providers

- 3.1.10 Number of contact hours
- 3.1.11 Comments

4. CONTINUING EDUCATION TRANSACTION PROCESSING PROCEDURES

Recommended procedures for processing continuing education accounting transactions can be found at <http://tamufmo.custhelp.com/>. These procedures are updated routinely and employees can request a notification be provided each time the procedures change.

5. APPROVAL OF PROPOSALS AND CONTRACTS

- 5.1 Administrative review of continuing education proposals and contracts is required. For a proposal, this review is made by the department head and dean. For a contract, and any amendments thereto, the review must include the Department of Contract Administration, with final approval by the President or designee. (See [University Rule 25.07.99.M1: Contract Administration](#)). The website for the Department of Contract Administration can be found at <http://finance.tamu.edu/contracts/>.

6. COMPENSATION FOR CONTRIBUTION TO A CONTINUING EDUCATION ACTIVITY

- 6.1 Texas A&M University may hire individuals who are already employed by TAMU to instruct educational courses which are not included in their regular job duties. It is expected that involved faculty or staff members who engage in a continuing education activity will meet their other responsibilities to the University. The Internal Revenue Service (IRS) requires that when an employee performs any service for his or her employer, all payments should be treated as wages subject to withholding, and payment of income and employment taxes is required.

For more information on supplemental compensation and dual employment, see [Standard Administrative Procedure 31.01.99.M0.02](#).

Forms

Final Annual Reporting template, <http://rules-saps.tamu.edu/forms/FinalAnnualReportingTemplate.xls>

Contact Office

Contact [Office of the Executive Vice President for Academics and Provost](#) for clarification and rule interpretation