

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) Committee 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 CPCS, CPES, or CPMSM, preferably multiple.
 - 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 Committee Student Instructor Review and Approval Process

- 1) Process to be used by the SME Committee 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 Committee. Recommendation from NAMSS instructor(s) will remain confidential.

After the SME Committee 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 Committee's decision in writing by the Chair of the SME Committee. Any student instructor applications for current or outgoing SME committee members will be reviewed and approved by the Professional Development Council.

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, CPES, 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 Committee 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 30 days in advance of the course;
 - b. Provide Instructor Agreements (MOUs) at least 30 days in advance of the course;
 - c. Provide materials for courses being taught at least 30 days prior to the activity;
 - 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 a 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	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
07/31/2025	08/11/2025

POLICY STATEMENT:

It shall be the responsibility of the Subject Matter Expert (SME) Committee 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 Committee via a scoring rubric developed by the SME Committee. 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, Committee 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 Committee and will be re-evaluated in their immediate next course by a second member of the Committee.
 - Should an instructor score a 1 or 2 in any given category, the SME Committee 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 Committee member feedback. Should the Committee vote to retain the instructor, the instructor will be required to go through coaching both with a SME Committee member and an independent instructor prior to independently teaching their next course.
- 4) The SME Committee shall review the NAMSS instructor roster on an annual basis, taking into consideration courses taught by each instructor, participant evaluation scores, and SME Committee audit scores. Instructors that do not meet the minimum criteria will be contacted by the Chair of the SME Committee to inquire of continued interest in remaining a NAMSS instructor. On a finding of good cause, as determined by the SME Committee 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 Committee to determine any changes to the NAMSS instructor roster. The instructor roster is to be approved on an annual basis for the following year by majority vote from the committee. Any instructors receiving coaching during a given year will not be eligible for course assignments until the formal roster has been approved. Exceptions to this process must be made by majority vote of the SME committee.

- 6) Instructors who are removed from the NAMSS full instructor roster may be reconsidered after two years, but they will be required to reapply and successfully complete student instructor training.
- 7) Instructors taking a leave of absence to serve as a NAMSS Board Member, 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 at the discretion of the SME Committee.

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

Amended 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
07/31/2025	08/11/2025

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) Committee 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 Committee
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	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
07/31/2025	08/11/2025

POLICY NAME: Granting Continuing Education Credits

Number: Education 1000.40

Effective Date: 12.18.2008

POLICY STATEMENT:

It shall be the responsibility of the Accreditation Committee to grant continuing education credits for educational activities outside the realm of traditional NAMSS provided 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 Webinars, pre-recorded NAMSS events that have been approved for NAMSS CEC accreditation and Synergy/Gateway Articles

PROCEDURE:

Learning that takes place in a group setting requires a CE application and proof of attendance. 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 by the applying entity, in the registrant's name.
- 2) CE Certificates will be sent to the person submitting the CE request.
- 3) *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. Organizations are responsible for providing CE certificates to their attendees.
- 4) 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.

Test Development – a current certificant may earn alternate credit hours by participating in any aspect of the test development process. This includes but is not limited to item writing, item review, form review, standard setting, and participation in job task analysis workshops. One hour of credit is awarded for each hour of participation. 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)**

Subject Matter Expert (SME) – a current certificant may earn alternate credit hours by providing subject matter expertise for various NAMSS educational offerings. This may include development of new offerings, updating existing offerings, or additional projects as needed. Hours will be awarded depending on the size of the project and will be communicated prior to accepting the role of SME. Paid subject matter experts are NOT eligible for credit. **(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. This includes NAMSS conferences, courses, and webinars, in addition to any state or vendor hosted education that has been approved for CEs by NAMSS. **(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 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 where content is directly related to the medical staff services profession.

College/University Courses – credit will be granted for successful completion of 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 Podcast Participation – credit will be granted for articles published in NAMSS Gateway, podcast episodes, or thought leadership activities. Two (2) credits will be awarded for each authored educational article or podcast, participation. Published works that are not educational in nature are not eligible for credit. Published thought leadership deliverables include, but are not limited to, development of new or updating of existing benchmarks, standards, toolkits, etc. authored article or podcast participation.

Originating Workgroup or Committee	Accreditation 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	Board Approval Date	
12/18/2008		
12/2010	1/21/2011	
	5/19/2016	
12/13/2019	12/19/2019	
3/26/2024	6/6/2024	
7/16/2024	7/23/2024	
11/25/2024	12/9/2024	
9/15/2025	11/10/2025	

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

Number: Education 1000.50

Effective Date:

POLICY STATEMENT:

It shall be the responsibility of the Accreditation Committee to review educational programs offered by parties that are seeking recognition by NAMSS for continuing education (CE) credits and to determine whether such programs qualify for CE credits and, if so, for which type of CE credits such programs qualify. The Accreditation Committee shall apply the criteria set forth in this policy, which will be referred to herein as the NAMSS Program Accreditation Guidelines.

PURPOSE:

To guide the Accreditation Committee in determining whether to grant NAMSS-approved credits to organizations offering continuing education activities and in determining the appropriate category of CE credits.

DEFINITIONS:

Categories of organizations which may apply for CE credit include:

- a. NAMSS state affiliates
- b. Non-profit (local chapters, not-for-profit hospitals, non-profit organizations, etc.)
- c. For-profit (corporations, vendors, law firms, third party training companies, etc.)

The organization submitting the application for NAMSS-approved credit(s) will be responsible for the following:

1. Developing program content;
2. Coordinating and hosting the program in-person or on a virtual platform;
3. Collecting all registration information from participants, including fees, when applicable;
4. Sending promotional materials*;
5. Distributing NAMSS-approved CE certificates to individuals who attend for the full duration and successfully complete the program; and
6. Being the primary contact for all questions related to the program content in the event follow-up is needed from NAMSS.

NOTE: It is the responsibility of the applying organization to ensure it is applying under the correct organizational category and paying the appropriate fee.

**Refer to item 7 of this policy for information on cross-promotion*

If a NAMSS state affiliate or other non-profit organization engages a for-profit company or other entity that regularly engages in the provision of training in the medical staff services profession to provide programming for live or recorded webinars, meetings or courses, and if that for-profit organization or entity will be conducting any of the responsibilities in 1-6 above, the appropriate applying organization category in such circumstance will be for-profit. NAMSS will reject an application if submitted under the incorrect category.

PROCEDURES:

On a prospective basis, a minimum of 30 days prior to the activity date, the applicant shall submit a completed application form to NAMSS when requesting approval for Continuing Education credits to NAMSS. 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 are not guaranteed to be approved prior to program date if submitted less than 30 days before a program.**

- 2) The NAMSS Accreditation Committee will use these NAMSS Program Accreditation Guidelines to determine whether or not submitted educational activities are eligible to receive NAMSS continuing education credits.
- 3) To qualify NAMSS approved credits, programs must be at least be one (1) hour of educational content, with no more than 10 minutes per hour being utilized for housekeeping activities such as speaker introductions, attendance, Q&As, etc. NAMSS Credit is not awarded for breaks, meals, networking activities, business or administrative meetings.
- 4) Upon receipt of an application for approved CE credit(s), NAMSS shall determine whether a program qualifies for NAMSS-approved CE credit(s) applying the factors described below:
 - a. **NAMSS-approved credits:** NAMSS-approved credits are given to programs which meet established NAMSS criteria found in NAMSS Policy 1000.40, for which an organization has submitted a formal application to NAMSS to be considered for NAMSS-approved credit, and for which NAMSS has granted approval for the program. MSP-specific stress reduction and wellness related topics must be specific to the MSP profession in order to be approved and is limited to two (2) credits per program.
 - b. **Non-NAMSS-approved credits:** Vendor or facility specific technology training, attendance at department, medical staff, or other work-related meetings, general stress reduction or other similar types of personal improvement activities, networking receptions, or viewing equipment at trade shows/exhibits are not eligible for NAMSS-approved credit.
- 5) NAMSS-approved credits will not be awarded to programs that appear to be sales pitches or product endorsements. NAMSS does not endorse specific manufacturer products and will not award programs CE Credit to programs that appear to be product promotion.
- 6) NAMSS credits cannot be advertised by the organization(s) until formally approved by NAMSS. This includes references to NAMSS credit application submission/credit eligibility on marketing materials and other course collateral. Phrasing such as "This program has been submitted to NAMSS for approval" is not permitted. Once CEs are approved, NAMSS will provide the applicant with the exact language that must be used when promoting programs offering NAMSS credits and NAMSS will provide applicable terms and conditions that the organization must agree to before using any of NAMSS trade or service marks. When promoting non-NAMSS approved programs, the organization(s) may not reference NAMSS credits in any promotional materials.
- 7) If NAMSS determines an application was submitted under the incorrect organization category after the program has occurred, such organization will be required to pay any difference in application fees to NAMSS promptly.

- 8) NAMSS-approved CEs will not be granted for programming that directly competes with or is scheduled to occur close in time and/or location to NAMSS educational offerings as determined by the Accreditation Committee in its sole reasonable discretion.
- 9) Cross-promotion is allowed by additional organizations with prior written approval from NAMSS. If any additional organizations, including other state or chapter associations, will be helping promote a program, the applicant should list them and their relationship with the applicant in its CE application.
- 10) Unless otherwise noted, NAMSS CE approval is valid for a single program in a calendar year and is not permitted to be carried over to a separate program offered by the organization.
 - 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 attendees are required to attend the entire program as a condition of the organization awarding NAMSS- approved CE credits.
 - b. Programs consisting of multiple sessions that are not part of one comprehensive event must be submitted individually to allow for individual CEs to be awarded (ex: a series of six lectures where attendees can choose which to attend).
 - c. Programs previously approved for credits are not guaranteed approval when offered again, regardless of time passed between offerings. Each application is reviewed on an individual basis and must be submitted in its entirety including all required information.
- 11) Any programs containing multiple sessions related to stress reduction, wellness, or personal improvement must be specifically related to the Medical Services Profession and, if approved, will be eligible to receive no more than two NAMSS-approved CEs per program.
- 12) Distance learning programs that have been approved by NAMSS for CEs and are offered to participants on a continuous basis are deemed to be approved for a period of one year after approval, after which, the applying organization would be required to obtain a new approval from the Accreditation Committee in order to offer program attendees NAMSS-approved CE credits.
- 13) The Accreditation Committee shall notify an applicant of its decision within 30 days of the submission of an application. If approved, NAMSS shall send certificates for distribution to program attendees/registrants to the applicant.
- 14) The NAMSS Accreditation Committee will make efforts to address with the applying organization any application issues that may cause the application to not meet the Guidelines before denial of application.
- 15) In cases where credit is denied, the applicant has the right to appeal the adverse decision directly to the Accreditation Committee. 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 Committee shall review the appeal. The applicant shall be notified in writing within seven (7) business days of the decision on the appeal. Only one (1) appeal on each adverse decision is permitted.
- 16) Should the program be altered following approval, the organization submitting the application must provide NAMSS with an updated program agenda via email for re-approval. This includes, but is not limited to, changes in presenters, session topics,

and learning objectives.

- 17) NAMSS reserves the right to rescind credits at any time should an application be found to have been submitted with false information, under the wrong fee category, or not submitted in truth and good faith.
- 18) 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.
- 19) Any organization found to be promoting an activity in violation of any of the above guidelines, not abiding by these and other NAMSS policies in good faith, or to have engaged in ethical or other misconduct, as determined at the discretion of the Accreditation Committee, will be ineligible for future CE approval for at least one year.

Originating Workgroup or Committee	Accreditation 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	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
3/26/2024	6/6/2024
9/15/2025	11/10/2025

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 two 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		12/4/2023

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) Committee 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 multiple-day programs will receive the following:
 - a. Instructors will co-teach with another instructor and each will receive \$1750
 - b. 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 single-day programs will receive the following:
 - a. Instructors will co-teach with another instructor and each will receive \$1250
 - b. 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 in-person course, instructors will receive an additional \$500.
- 4) When teaching at NAMSS Annual Conference, NAMSS will assign two instructors regardless of class size and adhere to subpoint “a” above for honorarium structure. If enough instructors are not available, NAMSS will default to option “b” above.
- 5) This policy does not overwrite existing student instructor payment policies.

Originating Workgroup or Committee	SME Committee
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	Board Approval Date
9/14/18	11/14/2016
10/4/2023	12/6/2023
07/31/2025	08/11/2025

POLICY STATEMENT:

The Subject Matter Expert (SME) Committee 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 Committee.
- 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 SME 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 Committee 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, student 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 as a full instructor 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) Upon development of a new formal course, SME eligibility will be approved by the SME Committee. Years of experience in the topic required will be determined by this committee depending on the topic, and should current instructors meet the criteria, they will be given first right of refusal to help create and teach the course. As applicable for new certification preparation courses, any instructors must be certified within one calendar year (or three exam cycles) to continue instructing the course.
 - a. Additional learning formats will have SME criteria approved by the appropriate committee. Any educational products, webinar series, short form courses, or new formats outside of formal courses will be at the discretion of the volunteer committee assigned responsibility by the Professional Development Council.
- 4) The SME Committee will review instructor evaluations following each course that they teach in accordance with current NAMSS policies.

Originating Workgroup or Committee	SME Committee
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	Board Approval Date
8/4/2016	11/14/2016
9/14/18	1/25/18
10/4/2023	12/6/2023
07/31/2025	08/11/2025

POLICY STATEMENT:

The Subject Matter Expert (SME) Committee 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) SME Committee is to identify one instructor champion for each of the following courses:
 - a) CPCS Certification Preparation
 - b) CPES Certification Preparation
 - c) CPMSM Certification Preparation
 - d) Credentialing 101
 - e) Credentialing 201
 - f) Leadership Certificate Program
- 2) Instructors will submit an application for the champion role with criteria determined for each course by the SME Committee. Selection will be approved annually based on a majority vote of the SME Committee.
- 3) Instructors may only be the champion for one live (virtual or in-person) course at any given time. Exceptions to this requirement must be approved by the SME Committee.
- 4) Before teaching a live course, either at the NAMSS Annual Conference, a state-run course, or a virtual 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.
- 5) 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 the identified course champion and NAMSS Education Team at education@namss.org to include in future course updates. Instructors will also be asked to meet with a member of NAMSS Staff and at least one member of the Courses Subcommittee within two weeks of completing a course to provide any logged feedback.
- 6) 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.

- 7) All edits to the live NAMSS courses must be approved by the designated instructor champion. The NAMSS Courses Subcommittee is responsible for integrating any recommended edits from the live courses to the on-demand course offerings as applicable. Should there be any discrepancies with the updates or changes, the identified instructor champion for the course will be given final approval.
- 8) On a cadence to be determined by the certification Job Task Analysis schedule, courses are to be fully overhauled with input from at least (2) full instructors and (2) members of the Courses Subcommittee. On years this overhaul takes place, no additional course edits will be made for this particular course. This cadence will be noted in the Education Roadmap as approved by the Professional Development Council and the Board of Directors.

Originating Workgroup or Committee		SME Committee
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
8/11/2025		9/28/2025