COC Procedures Manual for Traveling Courses

1. Overview

- The Council of Chapters Traveling Courses provide low-cost educational opportunities for ASA Chapters.
- Courses can be presented virtually or in-person, depending on the agreement between the chapter, instructor, and Chair of the Traveling Course committee.
- The Traveling Course Committee manages the traveling courses. The committee is made up of the six Chapter District Vice Chairs and ASA staff liaison(s). One of the District Vice-Chairs, serving in the last year of their term, will serve as Chair for this committee.
- The courses are often awarded to smaller Chapters and Chapters that have not had a traveling course recently.

2. Application Process

- Only Chapters who have submitted their annual report are eligible to host a Course.
- Applications are submitted through an ASA created jotform via the official website: Council of Chapters Traveling Course.
- The deadline for applications is January 22 at 8:00 p.m. Eastern time. The link to the jotform will be removed from the website after that time and the ASA Liaison will forward the downloaded submissions to the Committee Chair.
- Course assignments are made in February following the application deadline.
- Applications should be submitted after the course list becomes available in November and before the application deadline in January.

3. Course Selection & Scheduling

- The Traveling Course committee selects chapters from those that have applied to host a course and informs the Chapter of the selection.
- The chapter, instructor(s), and Chair of the Traveling Course committee will decide the best option for each course presentation (i.e. in-person or virtual).
- The instructors and chapters collaborate with the ASA liaison to finalize course dates. Chapters must give a minimum of 4 months' notice to schedule a date with an instructor. This allows the instructor to have enough time to plan any travel arrangements if needed and prepare the course. It also provides the ASA with enough time to promote the course and set up the registration portal as needed (see below).
- The Chapter point of contact completes the Traveling Course Schedule form.

- If desired, the Chapter may utilize the ASA's registration system to collect payments and registrations for their course. If they wish to do this, they must fill out the ASA Registration Information Form.

4. Financial Responsibilities

- The Council of Chapters covers instructor honoraria and, in the case of an in-person presentation, instructor travel to and from the host site.
- The hosting chapter is responsible for onsite presenter expenses (hotel, meals, ground transportation) and course costs (handouts, catering, room rental, AV equipment rental).
- Regardless of the format, the greater of $25 per registrant or $500 is paid back to the Council of Chapters. If a chapter wishes to allow some people to attend for free (i.e. students), these individuals are not included in the headcount for the financial responsibilities.
- If the Chapter is using the ASA's registration system, the ASA will calculate the amount owed by the Chapter to the Council of Chapters and send any remaining funds directly to the Chapter through ACH transfer.

5. Course Execution

- If virtual, the hosting chapter provides the platform (Zoom, WebEx, Microsoft Teams, etc.).
- If in-person, the chapter ensures venue setup, materials distribution, and logistical support.
- Chapters can review Tips on Hosting a COC Traveling Course.
- Chapters should consider advertising the course. They also have the option of creating their own registration system should they wish not to use the ASA's system. If they use their own system, the Chapter is responsible for managing registrations and payments for their course.

6. Post-Course Evaluation

- Feedback is collected from participants to assess course effectiveness.
- The Chapter point of contact is required to complete the evaluation form, which gathers insights on course delivery and logistics as well as the number of participants who attended.
- The evaluation form can be accessed here: Traveling Course Evaluation.
- Reports are shared with the Council of Chapters for future improvements.

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7. Course Instructor Responsibilities

- After the Instructor agrees to offer a course, they must sign the Instructor Agreement.
- After a course has been scheduled, the instructor must submit the Information for Reimbursement form and their W-9 form for honoraria (if applicable).
- After the course concludes, the instructor must complete the Traveling Course Reimbursement form.

8. ASA Staff Liaison Responsibilities

- The ASA Staff Liaison will ensure that the instructor has submitted the forms outlined in section 7.
- The ASA Staff Liaison will assist Chapters and Instructors with the scheduling of their courses.
- If the Chapter is using the ASA registration system, the ASA Staff Liaison will also coordinate the setup of this system.
- The honorarium and reimbursement will be added to bill.com after course is completed and all documents are collected. If the Chapter is using the ASA registration system, the funds will be transferred directly to the Chapter.