

Responsibility and Authority  
for Continuing Education and  
Conference Activities

**POLICY VIII.2.1**

Volume VIII, Teaching, Research, and Outreach  
Chapter 2, Conferences

Issuing Office: Provost

Responsible Officers: Directors, Continuing  
Education Division and Conference Division

Responsible Office: Continuing Education and  
Conferences

Originally Issued: March 15, 1977

Most Recently Revised: June 30, 2006

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**Table of Contents**

Table of Contents.....	1
Statement of Policy.....	1
Reason for Policy.....	2
Who Should Know This Policy.....	3
Related Documents.....	4
Contacts.....	4
Definitions.....	4
Exclusions.....	6
Procedures.....	7
Responsibilities.....	12
History.....	12

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**Statement of Policy**

As a state university and land grant institution, Purdue University bears a major responsibility to provide continuing education, professional development activities, and other extended accesses of learning and discovery to the public. This policy assigns academic, administrative, and fiscal responsibility for all continuing education and conference activity sponsored by a college/school, department, or other agency of the University. It also outlines those University-wide policies and procedures that govern the conduct of these activities. Exceptions to the policies and procedures presented must be approved in advance by the executive vice president and treasurer and the provost, or their designees.

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---

---

## **Reason for Policy**

### **Continuing Education**

The general purpose of Purdue *continuing education* activities is twofold: 1) to extend the reach of Purdue learning to nontraditional learners beyond the campus, and 2) to increase flexibility and access to learning for traditional and nontraditional students on campus. To meet these goals, continuing education activities may take the forms of distance learning courses and programs, off-campus courses and programs, on-campus evening and intensive courses, educational/informational products, or contract training. These activities are distinct from the regular campus-based learning activities of the University in one or more of the following aspects:

1. They may address audiences that are generally distinct from the traditional on-campus student and who may require special administrative handling or pedagogical strategies.
2. They may serve the University's engagement mission as well as the learning mission.
3. They may be offered and delivered in nontraditional formats (e.g., intensive, off-campus, on-site training, distance learning, etc.).
4. They generally operate outside traditional academic loads and are fiscally self-supporting, thereby requiring special financial procedures.
5. They may be miscellaneous learning, engagement, or discovery functions that require the unique services and/or facilities managed by the Continuing Education Division.

Because of these differences in audience, format, and intent, continuing education activities of the University are conducted under the special policies and procedures as outlined below.

University activities that reflect the characteristics indicated above are administered through Continuing Education and Conferences.

### **Conferences**

The term *conference* is used to denote a noncredit educational program or activity sponsored by a college/school, department, student organization, or other agency of the University. To differentiate a conference from a continuing education activity, in general, the administrative effort and resource cost for a conference are primarily related to the logistics and hospitality services for the event while the administrative effort and resource

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---

cost for a continuing education activity are primarily related to the instructional component. Conferences involve both on-campus and off-campus participants and are planned and designed to achieve one or more of the following objectives:

1. to update or expand technical or professional skills; or
2. to increase understanding of or involvement in special problems; or
3. to offer new attitudes or insights; or
4. to provide information about new techniques or disseminate new knowledge; or
5. to search for solutions to existing problems; or
6. to achieve learning for cultural enrichment; or
7. to conduct a business, social, or administrative function of a campus unit or outside organization that requires the unique services and/or facilities managed by the Conference Division.

Because of the unique professional services required to plan and administer a high quality conference event, the University has provided for this service through the policies and procedures as outlined below.

Any function listed in categories 1-7 above for which a registration or conference fee is collected must be administered through Continuing Education and Conferences.

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### **Who Should Know This Policy**

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President

Provost

Chancellors

Deans

Faculty

Vice Provosts/Vice Presidents/Vice Chancellors

Business Services Staff

Directors/Department Heads

Administrative and Professional Staff

Clerical and Service Staff

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---

## **Related Documents**

This University Policy supersedes Executive Memorandum B-47

Executive Memorandum B-46, Responsibility of Approval, Calendaring, and Scheduling of Facilities for University-Sponsored Activities

Executive Memorandum B-10, Policy on Intellectual Property

University Regulation Part 8, Regulations Governing the Use and Assignment of University Facilities

Executive Memorandum A-11, Delegation of Authority and Responsibility for Signing University Contracts

Executive Memorandum C-18, Compensation Policies for University Staff Members Participating in Continuing Education Activities

Executive Memorandum A-18, Approval of Fees and Charges

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## **Contacts**

<b><u>Subject</u></b>	<b><u>Contact</u></b>	<b><u>Telephone</u></b>
Continuing Education	Director	(765) 494-4654
Conferences	Director	(765) 494-7219
Financial Affairs	Director	(765) 494-2743
Continuing Education & Conferences	Dean	(765) 496-2321

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## **Definitions**

<b><u>Word</u></b>	<b><u>Definition</u></b>
<b>Conference</b>	Used to denote a noncredit educational program or activity of brief duration sponsored by a college/school, department, student organization, or other agency of the University.

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---

<b>Course</b>	A program of instruction that systematically explores a specified subject area offered under the guidance of an instructor in a series of sessions over an extended period of time.
<b>Self-supporting Activity</b>	A program which operates on the basis of revenues generated rather than general funding from the University. Self-supporting activities are designed to generate sufficient revenues to cover all direct costs of the program as well as CEC administrative costs and, in the case of credit programs, University facility and administrative costs.
<b>Distance Learning</b>	A structured learning process by which a student is physically removed (from both) the instructor and the instructional setting associated with the campus, but has the opportunity to interact with the instructor, or, also, other students in educational activities.
<b>Consortial Programs</b>	Courses or programs offered in cooperation with other institutions or groups of institutions organized into a consortium to meet specific needs. These programs may require special arrangements to suit the agreed upon policies of the consortium.
<b>Sponsor</b>	Used to designate the academic college/school and/or a department that assumes responsibility for the content and/or academic quality of the event. Events may be conducted “in cooperation with” (non-financial assistance) or may be “supported by” (financial assistance) outside agencies provided there is internal sponsorship.
<b>Chairperson</b>	Used to designate the University faculty or staff member who is assigned by the department head to represent the sponsoring college/school or department in the discharge of its responsibilities.

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---

#### **Coordinator/ Program Manager**

Used to designate the Continuing Education and Conferences staff member assigned to the conference or continuing education activity. The coordinator/program manager will be responsible for all aspects of the conference/meeting, with the exception of the program content. The coordinator/program manager is responsible for all administrative matters connected with the operation of the program. This includes, but is not limited to, developing the Letter of Agreement and the preliminary budget and advising the chairperson of all financial matters during the planning process, reservations of all facilities, coordinating food service, audio visual and transportation needs, coordinating the registration process, etc.

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## **Exclusions**

### **Assignment of Responsibilities for Regional Campuses**

#### **I. Responsibility for Academic Administration, Organization, Standards, and Control**

The chancellors of the regional campuses are responsible for implementing the academic administrative policies presented in this memorandum. The chancellors are accountable for the academic administration, classification, organization, and quality of continuing education and conference activities sponsored by their campuses. With the prior approval of the president or his designee, and where appropriate, the chancellors may develop specific policies for their campuses.

#### **II. Responsibility for Fiscal Matters**

The executive vice president and treasurer delegates to the chief business officers of the regional campuses the responsibility for implementing the fiscal policies presented in this policy. The vice chancellors for financial affairs shall be accountable for the financial administration of continuing education and conference activities sponsored by their campuses. With the prior approval of the executive vice president and treasurer, or designee, specific policies for each campus may be developed.

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- III. Exceptions to this policy must be recommended through the dean of Continuing Education and Conferences and approved by the executive vice president for business services and the provost, or their designees.

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## **Procedures**

### Academic Standards and Control

Responsibility for the academic content of a continuing education or conference activity is vested in the academic department, division, college/school, or other agency of the University that serves as sponsor of the activity. The chairperson or sponsor will be responsible for the determination of dates, the audience to be reached, the program content, choice of speakers or instructors, and will perform other duties related to the maintenance and evaluation of the academic standards of the event. Academic personnel will also be responsible for obtaining all of the needed academic authorizations to develop and offer the activities and distribute associated materials. Continuing Education or Conference personnel will participate in academic decisions to the extent that the decisions have a potential impact on financials, scheduling, customer service, or regulatory/legal concerns.

### Fiscal Matters

**Authorization.** For fiscal matters relating to continuing education or conference activities sponsored by Purdue University (West Lafayette campus), the executive vice president and treasurer delegates the authority to approve budgets, conference fees, noncredit registration fees, and other charges to the Continuing Education and Conferences director of financial affairs. For credit activities, current Board of Trustees-approved fee rates will be charged, except as permitted under special rate requests approved by the executive vice president and treasurer or his delegates.

**Program Budgets.** Coordinators/program managers will assemble, in consultation with the chairperson/academic sponsor, a projected budget for each activity. The budgets will be accompanied by Letters of Agreement in which the respective responsibilities of the sponsoring department(s) and the Continuing Education and Conference Divisions will be delineated. The budget estimate must be approved prior to: (a) the issuance of any public announcements; (b) the making of financial commitments to speakers, hotel properties, attractions, or others; and (c) the collection of any fees. Continuing Education budgets based on existing credit rate requests may be authorized within Continuing Education. Budgets must be approved by the appropriate department or unit head, the applicable dean or vice president, the responsible coordinator/program manager, the

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director of Continuing Education or Conferences, the appropriate business manager, and the dean of Continuing Education and Conferences prior to the implementation of the activity.

***Revenue Collection.*** The Continuing Education and Conferences director of financial affairs is authorized to receive moneys for University-sponsored activities, to include tuition and student fees, registration fees, ticket sales, publications, educational materials, and/or other items related to the continuing education or conference activities.

***Facilities and Administration Fees.*** All credit courses and programs administered by Continuing Education will return a fixed portion of their gross revenues to the University's general fund as facilities and administration fees.

***Staff/Faculty Compensation.*** Faculty and staff members may be compensated for their participation in continuing education and conference activities in accordance with Executive Memorandum C-18. Upon request, Continuing Education and Conferences can transfer funds to the sponsoring department in lieu of direct payment to staff.

### Use of University Facilities

When continuing education or conference activities are sponsored by a college/school or department of the University and are hosted in University facilities, they must satisfy one of the following:

1. educational meetings sponsored by colleges/schools or departments; or
2. educational meetings sponsored by colleges/schools or departments in conjunction with outside organizations; or
3. professional, scientific, and/or learned organizations having state, national, or international recognition; or
4. organizations other than educational which present programs that are directly related to institutional academic programs or that make use of the academic resources of Purdue University; or
5. recognized student organizations through the Office of the Dean of Students which present programs which have a relationship to academic programs or to campus activities; or
6. non-university groups which present programs of public or social significance that are a desirable contribution to general community welfare; or

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7. appropriate meetings, short courses, institutes, and/or other continuing education or conference events requiring facilities unique to those of the institutions.

### Ownership Rights

Continuing Education and Conferences will provide marketing, distribution, and financial management of Purdue intellectual properties associated with continuing education or conference-related programs.

The University's policies and procedures regarding disclosure and ownership of intellectual property, including inventions, copyrightable materials, tangible research materials, and trademarks (Executive Memorandum B-10 and/or succeeding documents) shall determine the ownership of continuing education- or conference-related scholarly or instructional materials, speeches, proceedings, recorded materials, other publications, and software. From time to time, as needed, Continuing Education and Conferences will provide written guidance to assist instructors, conference organizers, and others in the determination of ownership of intellectual property under University policy.

Continuing Education is also authorized to work in conjunction with Sponsored Program Services and/or the Office of Technology Commercialization to administer, distribute, and/or license Purdue-originated or Purdue-related courses and programs.

### Administration and Organization of Continuing Education Activities

The dean of Continuing Education and Conferences delegates the administration, organization, and management of all Purdue Continuing Education activities to the director of Continuing Education. Continuing Education activities will typically be administered by Continuing Education program managers in consultation with academic instructors/coordinators. Continuing Education program managers are charged with ensuring that:

- All activities are conducted in accordance with relevant laws, regulations, and the policies and procedures of Purdue University.
- Programs occur in an efficient, timely, and professional manner that is satisfying to the University's customers and clients.
- Fiscal matters (including both revenue collection and payments) are handled in an accurate and timely manner in accordance with established University fiscal policies and procedures.

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### Classifications of Continuing Education Programs

#### ***Evening Classes and Other Classes Outside Normal Academic Scheduling Hours.***

Evening classes at Purdue (undergraduate classes offered on campus beginning after 4:30 p.m.) will be operated as a generally funded activity of the University administered through Continuing Education. Continuing Education will determine a program of offerings to meet the needs of on-campus students and community members. Other classes outside normal academic scheduling hours will be offered as needs are identified on a self-supporting or generally funded basis.

***Intensive and Off-Campus Courses.*** Continuing Education shall be responsible for the administration of campus-based intensive classes offered on a self-supporting basis. Continuing Education shall also be responsible for off-campus offerings, in intensive and semester-based formats, that are offered on a self-supporting basis.

***Distance Learning Classes.*** Continuing Education shall be responsible for the administration of individual distance learning classes offered by the University to support on-campus students or to extend Purdue learning opportunities to the community, state, and beyond. Purdue-originated distance learning courses that primarily serve Purdue degree-seeking students shall be generally funded activities.

Continuing Education also will be responsible for facilitating degree-seeking students' (and other learners') participation in distance learning courses from other institutions, usually through consortial arrangement by which Purdue credit is awarded. These courses will be operated through general funding. They may be subject to procedural and fiscal guidelines established by consortial arrangements.

In addition, Continuing Education will be responsible for credit and noncredit distance learning courses intended to serve the needs of off-campus learners. These courses will be selected by Continuing Education, in cooperation with academic departments, based on educational need. These courses will operate on a self-supporting basis. If distant learners' needs would be best met by courses developed by third-parties, Continuing Education may offer such courses provided that the academic department whose disciplines most closely correlate to the third-party program approves.

***External Degree/Certificate Programs.*** Continuing Education will administer all Purdue self-supporting external degree and certificate programs intended primarily to meet the professional development needs of working adults.

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***Contract Training.*** Continuing Education will provide administrative support for contract training programs for external organizations conducted on campus, off campus, or in mediated form. Contracting organizations will be charged a negotiated fee that will include all direct and administrative costs of instruction. Contracts to deliver such training will be developed cooperatively by Continuing Education and Sponsored Program Services. Where training derives from an existing contract with Sponsored Programs, a Continuing Education administrative fee will be negotiated with Sponsored Programs.

### Administration and Organization of Conferences

The dean of Continuing Education and Conferences delegates the administration, organization, and management of all conferences to the director of the Conference Division. At the time a conference activity is submitted for approval (see Executive Memorandum No. B-46) to the director of the Conference Division, a coordinator will be assigned to work with the chairperson.

### Classification of Conference Activities

The director of the Conference Division shall have responsibility for determining the classification structure for each conference activity.

### ***University Program***

Internal – a program sponsored by an academic college/school, department, recognized student organization, or other University agency that solely benefits Purdue University faculty, staff, and/or students.

External – a program sponsored by an academic college/school, department, or recognized student organization that benefits the community or general public, and may also benefit Purdue University faculty, staff, and/or students. Examples may include:

- Conferences for state, regional, or national associations/societies/organizations in which Purdue University has an interest
- Professional and scientific associations/societies
- Non-commercial and non-profit agencies
- Public interest and governmental agencies

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---

### ***Non-University Program***

A program sponsored by the Conference Division or other external organizations that anticipates that individuals or organizations, external to the University, will be the ultimate recipients of the benefits from the program.

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### **Responsibilities**

The dean of Continuing Education and Conferences, in conjunction with the directors of the Continuing Education and Conference divisions, shall have the authority to categorize an event as either a continuing education or a conference activity.

The director of the Conference Division is responsible for the administration, organization, and management of all conference activity. The director will be responsible for determining the classification and assignment of conference activities to conference coordinators and approving conference estimated budgets.

The director of the Continuing Education Division is responsible for the administration, organization, and management of all Continuing Education activity. The director will be responsible for determining the classification and assignment of Continuing Education activities to program managers and approving Continuing Education estimated budgets.

The executive vice president and treasurer delegates authority to the director of financial affairs of Continuing Education and Conferences to approve conference budgets, conference fees, and other charges. The director of financial affairs is also authorized to receive moneys for these activities.

The academic content of the Continuing Education or Conference activity is the responsibility of the academic department, division, college/school, or other agency of the University that serves as a sponsor of the activity.

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### **History**

This policy supersedes Executive Memorandum B-47, amended May 26, 2004.

Supersedes Executive Memorandum A-254, dated December 28, 1964.

Supersedes Executive Memorandum A-198, dated December 15, 1960.

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