



## Arranging an In-House Course

### **Financial Analysis Certificate (FAC)**

### **Financial Analysis VBA Certificate (FAVC)**

### **Key Topic Lecture Series (KTLS)**

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The following notes give guidance as to some issues which need to be addressed and plans which need to be made to arrange an in-house offering of the Financial Analysis Certificate (hereafter referred to as the FAC), the Financial Analysis Systems Certificate (FAVC) and the Key Topic Lecture Series (KTLS).

#### **Scheduling the Course – FAC & FAVC**

For a six-day program, the FAC and FAVC should be scheduled into three sessions of two full day's lectures each. The three two-day sessions should be spaced with the second session at least two days, but usually one to two weeks after the first and the third session at least one week, but usually two to three weeks after the second.

Each lecture should be of eight hours' duration which includes two fifteen-minute tea breaks and a forty-five minute to one-hour lunch break. Generally, sessions are booked from 9.00am to 5.00pm on two consecutive days. The course may be scheduled for any eight-hour period between 8.00am to 9.00pm Monday to Friday and 8.00am to 5.30pm on Saturdays.

Alternatively, to reduce the impact on business time, but only where staff can commit to an early start and cope with a later finish, it is possible to schedule the FAC and FAVC into a five-day program, made up of three sessions, the first and last of two days and the middle one of a single day.

In this case, each lecture day will be of eight and a half hours' duration which includes two fifteen-minute tea breaks and a thirty-minute lunch break. Generally, sessions are booked from 8.30am to 5.00pm on two consecutive days. The course may be scheduled for any nine-hour period between 8.00am to 9.00pm Monday to Friday and 8.00am to 5.30pm on Saturdays.

Experience has shown that the best results are achieved with the second session scheduled a few days after the first and the third scheduled roughly ten days or so after the second. This is the general scheduling policy we follow as this pattern seems to produce the best training outcomes.

#### **Scheduling the Program – KTLS**

In scheduling the KTLS, you may choose a range of options from a single lecture, through a single day to a series of lectures to make up a training program. The table included in the KTLS brochure lists the currently available lectures in the series. They may be combined in any suitable combination to make up a program of one or more days' duration, which can be scheduled over whatever timeframe suits the organisation. The booking may be for a stand-alone series or may be integrated into a corporate or professional body conference or training program.

Pricing is dependent upon the number of days booked, and some premiums apply to schedule a single ½-day lecture by itself or to schedule them in the evenings. We can assist you in constructing a suitable program, once you have determined the training objectives, and we can assist with a needs-analysis.

Scheduling for each ½-day sessions should include a tea break of fifteen minutes. If two ½-day sessions are scheduled on a day, they should be separated by a one-hour lunch break. If three ½-day sessions are scheduled, a one-hour break should separate the second and third. A full day session should include two tea breaks of fifteen minutes and a lunch break of forty-five minutes to one hour's duration.

Lectures may be scheduled for any suitable period between 8.00am to 9.00pm Monday to Friday and 8.00am to 5.30pm on Saturdays and on Sundays, if necessary, by arrangement.



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### **Available Dates**

We will accept bookings generally between 8.00am and 9.00pm Monday to Friday and 8.00am to 5.30pm on Saturdays. On rare occasions, we will accept Sunday bookings where there is an overriding reason for the client.

Once you have a general idea as to the timing of the program, we can provide a calendar showing the dates available and those which may be available which are subject to a tentative booking. As we have more than one presenter available, it is possible that conflicting bookings can be made, so if you particularly need a date which shows as unavailable, check with us, as we may be able to make suitable arrangements.

### **Making a Tentative Booking**

As there is strong demand at certain times of the year, and it is not uncommon for us to receive bookings up to twelve months in advance, we recommend that you contact us and make a tentative booking as soon as you are reasonably sure of the timing that best suits you. This will allow you to promote the course internally to get the best attendance and minimise the per-student cost and sort out scheduling issues between the prospective participants' calendars.

There is no obligation or cost involved with a tentative booking, but it will reserve those dates, giving you the first right of refusal. Having accepted a tentative booking for a set of dates, we undertake to contact you and give you the option to confirm your booking before accepting an alternative firm booking from another client. Should you be unable to commit to the booking, then the firm booking from the other client will take precedence, and you will need to consider alternative dates.

If you have not already done so, thirty days from the tentative course start date, we will contact you and ask you to make a firm commitment and confirm your booking.

### **Making a Firm Booking**

Once a firm booking is received for an agreed minimum number of students, those dates will be reserved for you, and staff committed to the engagement. In exchange for this commitment, which is not always easy for us to change or to rebook with another client, we require that you make a similar commitment and your written instructions to make the booking indicates that you have accepted certain penalties which are set out in the materials below, relating to cancellation or postponement without sufficient notice.

Should your purchasing system require a purchase order to be raised, you should raise it at the time of confirming a booking to ensure that the invoice can be processed without delay prior to the commencement of training.

### **Catering**

Although not essential, we would generally recommend the provision of a light lunch and morning tea to be brought in. This has the advantage of keeping the participants together in an informal group which facilitates the asking of questions which might otherwise not get asked or answered in class. It assists in keeping everyone focused on the training event and avoids delays in returning to class after the breaks.



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### **Training Venue**

A separate schedule is enclosed setting out the training venue requirements for each course.

### **Student Contact Details and Privacy**

Just before the course commences, we will contact you and request a final course attendance listing. We will request each participant's email address. We use the address for the purposes of making arrangements for the course and providing the worked materials from the course sessions.

We publish on our web site a privacy policy which relates to the personal information of participants and a confidentiality policy which relates to our dealings with incorporated bodies, and covers any confidential information we may become aware of during the training engagement. We consider ourselves bound by these policies and will adhere to them in all our dealings with you and your staff.

At the completion of each session, we email to each participant a zipped archive of the facilitator's workings. This ensures that if any exercise is varied in class, in response say to a student enquiry, they will have access to a complete copy of in-class workings, which may be different to the prepared solutions.

In addition, after sessions in the FAC & FAVC in which workshop exercises are undertaken by the participants, we email to them a commentary and set of sample solutions for that workshop exercise, which of course are not provided in the initial file set.

We will not initiate contact with your staff after the conclusion of the course other than to distribute working files to them or to address any administrative matter arising. Contact after that will not occur unless initiated by your staff member.

### **Attendance & Attendance Records**

Each participant is expected and advised to attend all sessions. Due to illness or unforeseen business events, a participant may need to be absent from one or more sessions. In this case, we ask that notice be given as soon as possible.

We maintain attendance records for all sessions and use these to ensure that participants have completed the required course work for the issue of a certificate of completion, and to manage any deferrals, requests for make-up lessons etc. Attendance is recorded as present for a full day, present for a ½-day, absent without notice or absent with notice given.

We are happy to provide a copy of this report to the human resources department at the completion of the training engagement so that your own company records can be updated. This report will detail attendance on the basis described, by participant by date.

### **Assessment, Certificates and CPE Hours**

Unless an assessment is undertaken, a certificate of completion is issued which includes the course title, the date, and the length of the course and it includes a URL to the course outline.

For the FAC & FAVC, a certificate of completion will generally only be issued if the student has attended at least 75% of the offered sessions. Participants may complete their studies by attending the missed



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sessions at a public course. Depending upon the number of sessions, a small fee to cover computer hire and catering may be incurred. At present that fee is \$ 125.00 per day.

For the KTLS, a certificate may be issued and will specify the sessions in the program attended.

Our courses are suitable for claims for continuing education under the self-assessment guidelines of the accounting and for some other professional bodies. The certificates detail the days or hours of attendance to support those claims.

Assessment is optional for the FAC & FAVC. If the client chooses to include the assessment, then the final workshop in the course and some optional material is replaced with a final assessed workshop of three to four hours in duration.

In that case the students are set one or more tasks which they are asked to work and submit a solution for grading. The tasks are similar in nature to those used for workshop exercises during the course. They work in groups and provide the solutions for assessment, which are graded against not just their class, but the broad body of students who sit the course.

Grades are Pass, Credit, Distinction and High Distinction. In this case, a similar certificate to that described above is issued, except that in addition it includes a grade.

### **Training Materials**

On the first day of each course, we will provide the following materials:

- ) Courseware bound in covers – one set per student in attendance.
- ) Course files are available for download from our web site. The address for this is given inside the materials.
- ) Some optional materials are also occasionally provided.

### **Intellectual Property & Copyright**

The copyright in the materials is owned by Clarkson ITT Pty Limited and the materials may not be reproduced without our consent. In general, that consent will be withheld. No implied permission is granted for the reproduction, scanning or dissemination of the printed course materials and those provided in portable document format. We will take action if we become aware that our copyright is breached.

The participant may re-use the Excel-based course files in their work and may circulate those files which include a Creative Commons Licence with those specific permissions, although they are required to include the Creative Commons Licence and branding in the materials circulated.

### **Terms**

The invoice for any training engagement will be issued a fortnight before the training program is scheduled to commence and for the booked number of students at the quoted price. It is due for settlement prior to the commencement of the training program, and your written instructions to book the course will affirm your acceptance of this condition.

Training engagements may be settled either by cheque, electronic funds transfer to the account shown on the invoice or may be settled using a credit card.



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### **Change to Number of Booked Participants**

Once a booking has been made for an agreed minimum number of participants, that number may not be reduced without our written consent. You need to be aware that a reduction in the number of participants booked may lead to a change in the facilitators allocated to the training event.

The student numbers may be increased at any time up to the commencement of the course, and a separate invoice will be issued for the extra student fees if the notice is received after the initial invoice has been issued. Our consent is required to raise the number of students beyond the number that can be professionally handled by the assigned staff and is subject to the availability of extra staff.

### **Notice of Cancellation or Postponement**

Once a firm booking has been accepted, we require notice of any cancellation or rescheduling of a course in writing at least thirty calendar days prior to the scheduled commencement of the course. The written notice can be sent by facsimile to +61 (2) 8088-1200 or by email to [courses@clarksonitt.com](mailto:courses@clarksonitt.com).

Your firm booking includes acceptance of the following penalties which will become payable should insufficient notice be received of a cancellation or change in the booking. In that case an invoice will be issued shortly after the notice is received and will be due for settlement within seven (7) days.

We are in the business of offering training and are not in the business of making our income from penalties. Therefore, we will be lenient where we can and if we can make an alternative booking, we may reduce or waive the fees, to the extent that the alternative booking relieves us of any disadvantage through the rescheduling or cancelling of your engagement.

#### **Cancellation Penalty**

Cancellation of a course with less than thirty days' notice in writing after a firm booking has been accepted will incur a fee of twenty-five per cent (50%) of the agreed minimum course fee. This will also apply if the lead time in the initial booking is less than thirty days.

Cancellation of a course with less than fourteen days' notice in writing after a firm booking has been accepted will incur a fee of one hundred per cent (100%) of the booked fee. This will also apply if the lead time of the initial booking is less than thirty days.

#### **Postponement Penalty**

Subject to our agreement, a change in commencement date necessitated by an unexpected business or natural event may be made provided it does not delay commencement by more than fourteen days. Notice should be given as soon as possible before commencement in writing.

A delay in commencement by more than fourteen days will incur a rebooking fee of fifteen per cent (15%) and the change dates will be subject to availability and our agreement.