



U. S. National Coordinating Team Policy & Procedure Manual

Edition 2.1 – Effective March 1, 2023

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USNCT Policy & Procedure Manual



Version	Date	Significant Changes
2.0	09/01/2022	New edition renamed to USNCT Policy & Procedure Manual (PPM) to differentiate from the SMI Operations Manuals (OM)
2.1	3/1/2023	Section 4 Surplus Materials – the option for Event Managers to retain surplus materials is withdrawn.



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Section 1 - Framework

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Policy Framework

Formal policies and procedures are a necessary part of any organization. They provide **tangible evidence** of the values and methods that make an organization distinct. A policy **framework** guides the development of policies and procedures to ensure they are both consistent and understandable. The framework lays out a strategy for creating, communicating and managing your policy documents with clarity.

A Policy Framework consists of:

1. **Hierarchy** – A hierarchy showing which documents take precedence in the event there is any gaps or inconsistencies.
2. **Development Process** – This deals with when and why a policy needs to be developed or revised, or even terminated. This is called the policy lifecycle. It also includes templates to ensure consistency in the style and content of policies.
3. **Roles and Responsibilities** – This deals with who is involved in the development, review, approval, publication, communication and implementation phases of the lifecycle.

Policy Hierarchy

Following is a summary of the hierarchy, or precedence, governing the operations of SMUSA.

Level 1 – Laws and Regulations

These are government authorities of the USA and are the highest precedence. In some cases, these include Standards documents which are referenced in any or all documents in the hierarchy.

Level 2 – Incorporation and Bylaws

SMUSA is an incorporated entity with official Incorporating documents and Bylaws. They are generally static and require action by the organization's governing board to change. All policies or procedures must align with them.

Level 3 – Policies

Policies are high-level documents and should be long-standing and infrequently modified. They should include philosophical and conceptual statements, definition of authority for execution. They are usually developed under the direction of the SMUSA Board of Directors ("Board") and in conjunction with the USNCT and adopted by the Board. Execution and enforcement usually falls under the USNCT.

Level 4 – Procedures & Forms

These are lower-level documents that explain practically how policies will be applied. Procedures codify specific requirements for compliance with the policy. There may be multiple procedures, each customized to a definable area, but consistent with the philosophies in the policy. Procedures will change more frequently than policies, especially in response to changes in operating conditions. Compliance with procedures is usually mandatory, and will carefully distinguish between “must” and “should” in the documents. Forms are a means of communication, typically gathering information and approvals, for a given procedure. The forms may be implemented electronically. For continuity and clarity, procedures should be documented at an appropriate level so that an inexperienced individual could understand them.

Level 5 – Other documentation

The individuals carrying out the Procedures will often develop individualized manuals, handbooks, guidelines, practices, and even “cheat sheets”. They may apply to the individual or workgroups. These are developed and managed informally but must comply with the Procedures under which they fall. For continuity and clarity, each individual should consider documenting them at an appropriate level so that an inexperienced individual could understand them.

Policy Development Process

At this time, the SMUSA Policy Development Process is informal, but consists of the following.

1. **Need** – The Board or the USNCT will identify when a policy needs to be developed, revised, or terminated.
2. **Drafting** – An individual or workgroup will usually draft the initial policy or the necessary revisions. If it is a new policy, the draft should follow the standard format for SMUSA policies.
3. **Review** – The draft document will be initially reviewed by the Board and/or USNCT, and may be referred back to the drafter(s) for further work. When complete, the draft document will be presented to the Board for approval.
4. **Approval** – The Board must approve all Policy documents or revisions. The Board may ask the USNCT to provide preliminary approval of the document.

Policy Roles & Responsibilities

The Roles and Responsibilities for development, review, and approval of SMUSA Policy is included in the Process above. However, publication, communication and implementation phases of the lifecycle will generally fall under the USNCT. The “SM Family” (everyone involved in the Simply Mobilizing movement in the USA) will mostly be volunteers and hold titles such as Coordinator, SM Mobilizer, Head Facilitator, etc. Effective publication and communication of Policies, Procedures, and Guidelines is absolutely critical to achieving compliance. The role of the USNCT will largely be oversight.

About the PPM (Policy & Procedure Manual)

The *USNCT Policy & Procedure Manual* provides USA-specific policies and practices for SM activities. Each country in the global SM network must contextualize the Global SMI policies and practices to best fit the realities of their country. The USNCT is the authority behind the PPM. Questions or suggestions may be addressed to the USNCT via info@simplymobilizing.us.

Edition 2 changes

Edition 2 drafting began in July 2021 introducing the following changes

- Renamed from “Operations Manual” to “Policy & Procedure Manual” to avoid confusion with the global SMI document known as the Operations Manual, or OM.
- Restructured sections
- Moved course-specific content into the Facilitator Guides for the course
- Expanded the Training Pathway sections
- Removed technical usage documentation about the Course Manager System (CM2)

Who Should Use this PPM

The PPM is to be used by the USNCT members, other Coordinators, Head Facilitators, and SM Mobilizers. If you are in one of these categories, you are responsible to read this PPM and have a working knowledge of it. You are to comply with it in all activities related to SMUSA.



Section 2 – Introduction to SM

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Introduction

About Simply Mobilizing

Who We Are

Simply Mobilizing (SM) is an international “movement” dedicated to the mobilization of all God’s people into meaningful involvement in the world Christian movement, through the formation of a biblical worldview that sees ‘mission’ as the ‘call’ upon every believer’s life and the primary purpose of the existence of the Church- both universal and local. Simply Mobilizing International (“SMI”) was founded and is based in the Philippines.

We are the official United States entity of SMI. As part of this global family, SMI is currently active in over 90 countries, covering 12 global regions with translations in over 30 languages. In the US, we have a National Coordinating Team, comprised of a Core Team, and Language Coordinators for Chinese and Korean. The National Coordinating Team of the US will be expanding as we continue to develop a US movement. **SIMPLY MOBILIZING USA, INC.** is an incorporated 501(c)(3) religious non-profit organization.

What We Do

Simply Mobilizing has a vision to see all God’s people mobilized for the world Christian movement. Our courses and programs are specifically designed to help form a biblical worldview leading to engagement with God, on mission, in today’s world.

How We Do It

Developing Missional Churches

We are passionate about seeing missional churches throughout the world, nurturing, equipping and releasing God’s people to be on mission with God.

Mobilizing All God’s People

We are passionate about seeing all God’s people mobilized to be fruitfully engaged with God, on mission.

Empowering Mobilizers

We are passionate about seeing mobilization as a valid ministry in the Body of Christ and the empowering of mobilizers to function effectively in this God-given ministry.

USA Organization

As early as 2002 sporadic Kairos courses appeared in the U.S., usually introduced by those with connections back to the Philippines. Then, in 2009, a concerted effort of multiplying courses was begun when a team of international coordinators introduced the course to U.S. based mission sending agency, Team Expansion in Louisville, KY. Team Expansion embraced the course with enthusiasm and began offering the course regularly as well as training others to do the same. In a few short years the courses multiplied into dozens happening nationwide and hundreds of graduates every year. In 2015, the name Simply Mobilizing was introduced, growing out of the foundation of the Kairos course and with new resources and a refined vision for mobilization. In the years following, Team Expansion provided continued leadership, but with much prayer God raised up additional leadership for this expanded movement and a new US National Coordinating Team (USNCT) was formed. In 2019, a distinct incorporated entity was formed named **SIMPLY MOBILIZING USA, INC.** (“SMUSA”) and a formal Franchise Agreement was arranged with Simply Mobilizing International. Going forward, the USNCT is accountable to SMUSA.

US National Coordinating Team

The USNCT is responsible for all aspects of the Simply Mobilizing movement within the USA. The cultural diversity of the USA is beginning to be reflected in the existence of Language Coordination Teams (LCT) for the Chinese and Korean diaspora churches. Other language groups mentioned above in Who We Are do not yet have an LCT structure. However, new LCTs will be formed when there is sufficient interest and commitment to engage in the development process.

The USNCT anticipates that Regional Coordination Teams (RCT) will emerge over the coming years as the SM movement matures. In general, LCTs and RCTs will be represented on the USNCT either formally or in an adjunct role.

USNCT members

CORE TEAM

National Coordinator	Colleen Di Raddo	colleen.diraddo@simplymobilizing.us
	Joshua Rodenbaugh	joshua.rodenbaugh@simplymobilizing.us
	Randy Hultman	randy.hultman@simplymobilizing.us

LANGUAGE COORDINATORS

Korean	O Jun Kwon	fishbonekwon@gmail.com
Chinese	Isaac Chan	isaackchan@gmail.com

The Core Team consists of those individuals who are involved in the day-to-day conduct of USNCT business. The Core Team will oversee the activities of individuals functionally supporting various aspects of the USNCT operations. Core Team members are not necessarily official members of the USNCT.

Members of the “SM Family” in the USA are invited to prayerfully consider offering time and talents to serve as a supporting member of the USNCT. To learn more, contact info@SimplyMobilizing.us.

Websites

For more information, please see the following websites:

www.simplymobilizing.us	Simply Mobilizing USA website
www.simplymobilizing.com	Simply Mobilizing International website
coursemanager.simplymobilizing.com/login	URL for the Course Manager System and publicized courses

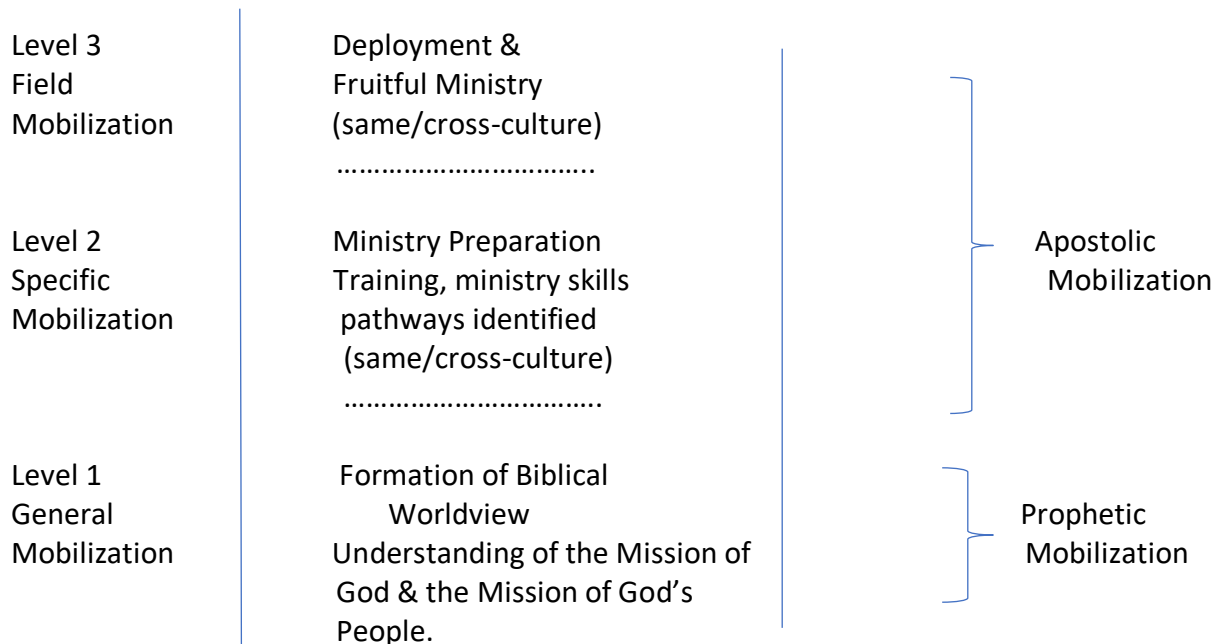
What is Mobilization?

Mobilization Levels

Mobilization is both *apostolic* and *prophetic*. These are the two primary ministries given by the risen Christ to provide leadership to the Church in order for the Church to engage effectively in the world Christian movement in each and every generation.

The SM Movement is defined by the prophetic expression of mobilization and this we refer to as **Level 1 Mobilization**. Levels 2 and 3 mobilization are apostolic in expression. See chart below.

Level 1 mobilization is concerned with the formation of a Biblical worldview that provides believers with the understanding that they have been saved to serve with God on mission. It also provides churches with the understanding that they exist for mission and that their primary purpose is to prepare God's people to be on mission with God.



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Course Manager

SMI Global has implemented its global policies and procedures for planning, operating and reporting of SM courses in the **Course Manager**. A new version of the Course Manager, referred to as “CM2”, was released in 2021. At present, there is no User Guide for the system. The user interface is dramatically different, so even users familiar with the original Course Manager may find it difficult to navigate.

Courses under CM2

CM2 contains User records and Course data. Both sets of data are built up as SM courses are conducted and recorded in CM2. For courses managed by CM2, the process flows are predefined in the system. These process flows differ by course, and at present some courses have not been fully implemented. In the US, we use CM2 for the following courses:

Courses using CM2 (for USA)	Courses NOT using CM2 (for USA)
Kairos Course (KC) KC Facilitator Training (KFTC) KC Head Facilitator Training (KHFTC) Youth Kairos (YK) YK Facilitator Training (YKFTC) YK Head Facilitator Training (YKHFTC) Interface Seminar	The Unfinished Story (TUS) TUS Facilitator Training (TUSCF) Empowered to Influence (ETI) ETI Facilitator Training (ETICF) General Church Coordinator (CC) Coordinator Training

POLICY – Use of Course Management System

The term **Event Manager** is based on its use in the Course Manager. It is the authorized individual responsible for the planning and execution of an SM Course. For KC/YK, this is the Head Facilitator.

1. All courses designated as “Courses using CM2 (for USA)” in the table above **must** be created in CM2 as a Course Plan at least 2 weeks prior to the course start.
2. Upon approval of the course plan, the Event Manager for the course **must** fully complete all sections of the Course in a timely manner.
3. Upon completion of the course, the course report **must** be fully completed and submitted within 30 days.
4. Failure to comply with this policy **may** result in the Event Manager losing CM2 privileges such as course creation, and/or future course plan approval may be withheld until the failure is remedied.

Standards for Course Information

This section is not intended as a technical guide to use of CM2. Rather, it documents the standards for how certain course information is to be entered.

POLICY – Course Information

1. The course creator or Event Manager **must** comply with the standards that follow for course information.
2. The course creator or Event Manager **should** complete all course information fields that are applicable to the course in a complete manner.

Course Information	Applicable Courses	Standards for entry
Event Title	All	<p>Combine the following in the order shown:</p> <ol style="list-style-type: none"> 1. Course type (e.g., “Kairos”, “Interface”) 2. Language (e.g., “English”, “Korean”) 3. City/State (e.g., “Las Vegas NV”, “Washington DC”) – if the course is online, enter “Online”) 4. Format (one of the following) <ol style="list-style-type: none"> a. <i>Intensive</i> – A consecutive sequence of days b. <i>Weekly</i> – One session per week c. <i>Weekend</i> – Primarily held on weekends d. <i>Other</i> – Any format not covered above <p>Example: A Mandarin Kairos course held in Los Angeles California would be “<i>Kairos Mandarin Los Angeles CA intensive</i>”</p>
Host Information	All	Except for online courses, contact information for the host church/organization is required.
Fee Collection	All	The standard procedure for Fee Collection is by the Church/Organization that is hosting the course. Collection by the Head Facilitator indicates a special situation in which the HF will collect payments made directly to SMUSA and requires special approval by the NCT.
Chosen Format	All	CM2 will present commonly used formats. If you are planning to use a different format, provide a detailed description. You should consult with the NCT before submitting the Course Plan.

Course Information	Applicable Courses	Standards for entry
Course Fee	All	The NCT has established standard pricing models for all courses and guidelines for discounting or subsidizing course fees. This field must comply with PPM Section 6 Financial.
Budget	All	Even though this field is optional in CM2, it is considered mandatory for US courses. Provide calculations for revenue and estimates for expenses. Also show estimates for any discounts or subsidies. If there is a possibility that the expenses could exceed the revenue, you must consult with the NCT before submitting the Course Plan.
The following fields are applicable AFTER the Course Plan is approved.		
Publicize: Cost	All	The NCT has established standard pricing models for all courses and guidelines for discounting or subsidizing course fees. This field must comply with PPM Section 6 Financial.
Team:	KC, YK	All members of the team must be listed including HF Trainees, Facilitators, and Admins. <ul style="list-style-type: none"> Note: if you cannot find the individual you wish to add to the team, please contact the NCT.
Registration: Participants	KFTC, KHFTC	For advanced training courses, Participants must already exist within the CM2 database. If you cannot find the individual you wish to add as a participant, please contact the NCT.
Attendance: Participants		The Event Manager must provide accurate information regarding the attendance of each participant.
Finance: All fields	All	The Event Manager must provide sufficient detail in this section to establish that the course complies with the NCT's overall financial standards as documented in PPM Section 6 Financial.



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Conducting Courses

Course Materials

Document Formats

Most SM Courses, Seminars, and Trainings require various materials for the Participants. The materials are provided in one of the following forms.

Form	Description / examples
NCT-provided Hardcopy	The NCT arranges for production of the documents and distributes them upon request to Event Managers of an approved course. <u>Examples:</u> Kairos Reader, TUS/ETI workbook, Interface Participant Guide. Also Facilitator Guides can be ordered from the NCT.
Local printed	The Event Manager of an approved course should have electronic copies of the materials. The Host organization (for in-person) or Participant (for online) is responsible to arrange for printing of the materials. <u>Examples:</u> As determined by Event Manager
Electronic version (e-copy)	The Event Manager of an approved course will provide instructions for obtaining an official e-copy of the document in common formats (e.g., Kindle). <u>Examples:</u> Kairos eReader

Ordering Course Materials

It is the responsibility of the Event Manager of an approved course to make arrangements for course materials in a timely manner. If the order provides less than 2 weeks for delivery, expedited shipping costs will be added to the invoice. Most orders for materials are submitted by email as follows:

1. To: materials@simplymobilizing.us
2. From: the Event Manager of an approved course
3. Specify:
 - a. CM2 Course number
 - b. Document name
 - c. Language
 - d. Number of copies
 - e. Shipping address
 - f. Invoicing information (name, email, address)

Digital e-books

► Currently, e-books are only available for the English Kairos Reader.

Event Managers for courses, especially online courses, should include information in the CMS publicity section regarding digital e-books. When someone registers in the CMS for a Kairos course, they will have the option to choose a physical (hard copy) or digital (soft copy e-book) version of the course materials (or both). Those registering without a U.S. mailing address should only choose the digital option. The registrant will receive a confirmation email with instructions for payment, and upon payment, another email will include one-time download links for the e-book. More specific instructions will be in the Course Manager guide.

Requests for e-books will be fulfilled at no cost if the requestor previously completed a Kairos course.

Surplus Materials

The USNCT no longer allows for Event Manager to retain unused copies of the Kairos materials. Therefore, all unused copies must be returned to the USNCT in good condition.

Return:

The Event Manager **must** notify the NCT via materials@simplymobilizing.us prior to returning materials. The NCT will provide instructions regarding how to return the materials. The sender will pay for return shipping. Only in **exceptional** circumstances will the NCT refund money already paid for materials. If the NCT determines that returned materials cannot be reused, the NCT will notify the Event Manager accordingly and an invoice may be generated for the value of the materials.

Retained:

The option to retain course materials is no longer available.

Replacement Materials

Replacement materials may be ordered as long as there is proof of having previously completed the course and paying for the original materials. Each copy will be priced as shown below, and the shipping cost will be added to the invoice.

Course	Product	Unit price
Kairos	Kairos Readers (English)	\$20.00
	Kairos Focusing Prayer Guide (English)	\$1.00
	Kairos Devotion Guide (English)	\$1.00
	Kairos FTC Manuals (English) <i>may be printed by the Event Manager leading the FTC</i>	Contact us
TUS/ETI	TUS/ETI workbook (English)	\$5.00
	TUS/ETI CF Manuals (English) <i>may be printed by the Event Manager leading the CF training</i>	Contact us
► NOTE	<i>Other language products will be added in the future</i>	Contact us

Fee Collection and Payments

In most cases the course fees will be collected by the host church/venue either directly or through the Event Manager. Simply Mobilizing USA will then email an invoice to the Event Manager or Host for the appropriate portion of the course fees (if a printed invoice is needed, please request from payment@simplymobilizing.us).

Any form of collection and payment involving SMUSA requires **prior approval** of the NCT.

Payment may be made electronically from the link provided in the invoice. Checks must be payable to “SMUSA” with the CM2 Course Number in them memo line. Mailing instructions will be provided via the invoice.

Course Integrity

Course Facilitation

SMI provides Guides for conducting all of their courses and trainings. The NCT may contextualize them for use in the USA. All Event Managers and members of the Team **must** fully comply with these Guides.

Course Venue/Environment (In-person vs. Online)

For all SM Courses, but emphatically for Kairos and Youth Kairos courses, it is the responsibility of the Head Facilitator to prepare their team for the venue/environment being used for the course. This may mean additional coaching for the Facilitators ***if this is their first time serving in the selected venue***. Though the **content** of Kairos is consistent, the skills needed for online vs. in-person are different. The Facilitators must be prepared to do well in their course roles.

Therefore, the NCT recommends that the Head Facilitator assess **each Facilitator** regarding their experience in the course venue. If the Facilitator lacks experience, then the Head Facilitator **must** coach them prior to the course starting in the new venue. Ideally, this would occur far enough in advance for the HF to replace them on the team if needed.

Course Content Changes

SM Courses are carefully developed using materials that are highly effective when properly facilitated. The developer, Simply Mobilizing International (SMI), continuously enhance course content. SMI authorizes the NCT for each country to contextualize elements of courses for use in their country. However, individual Event Managers and Course Teams are **not authorized** to make such decisions on their own. Adding content, removing foundational content, or modifying content is a violation of the Core Value of Integrity that each SM Facilitator has agreed to maintain. Content changes may be suggested to the NCT. However, it is ***expressly forbidden*** for individuals to take such actions on their own.

Entering into Contracts

For some courses, it may be necessary to rent facilities or equipment that requires a formal contract with the provider. Any such contracts **must** be arranged by the Host organization as the primary party. In no case shall Simply Mobilizing USA be named in the contract. Ideally, the Event Manager **should** consult with the Host organization to make sure the facilities or equipment will be satisfactory for the course.

Cancellations

If the course is cancelled by the Event Manager or Host, a full refund *should* be given to Participants who have paid. If a Participant cancels, a refund *should* be granted less a reasonable administrative fee as determined by the Event Manager or Host. If funds have already been remitted to SMUSA, please contact payment@SimplyMobilizing.us to request refunds.



Section 5 – SM Training Pathway

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SM Training Pathway

Products, Programs and Training

Simply Mobilizing (SM) incorporates multiple mobilization products and programs which are designed to move forward the SM vision of seeing all God's people living a life on mission with Him. SM also incorporates different trainings to support the growth of this mobilization movement. Each course, program, or training fits together with the others to achieve the SM vision.

Like all training, there is a typical pathway, or sequence, in which courses and trainings are completed. This is called the "SM Training Pathway". The SMI Operations Manual provides a comprehensive understanding of the descriptions, guidelines and delivery of every SM product, program, and training. As previously noted, the USNCT is charged with implementing this with the country, including contextualization to fit the cultural needs. At the global and country level, these manuals exist to SERVE mobilization.

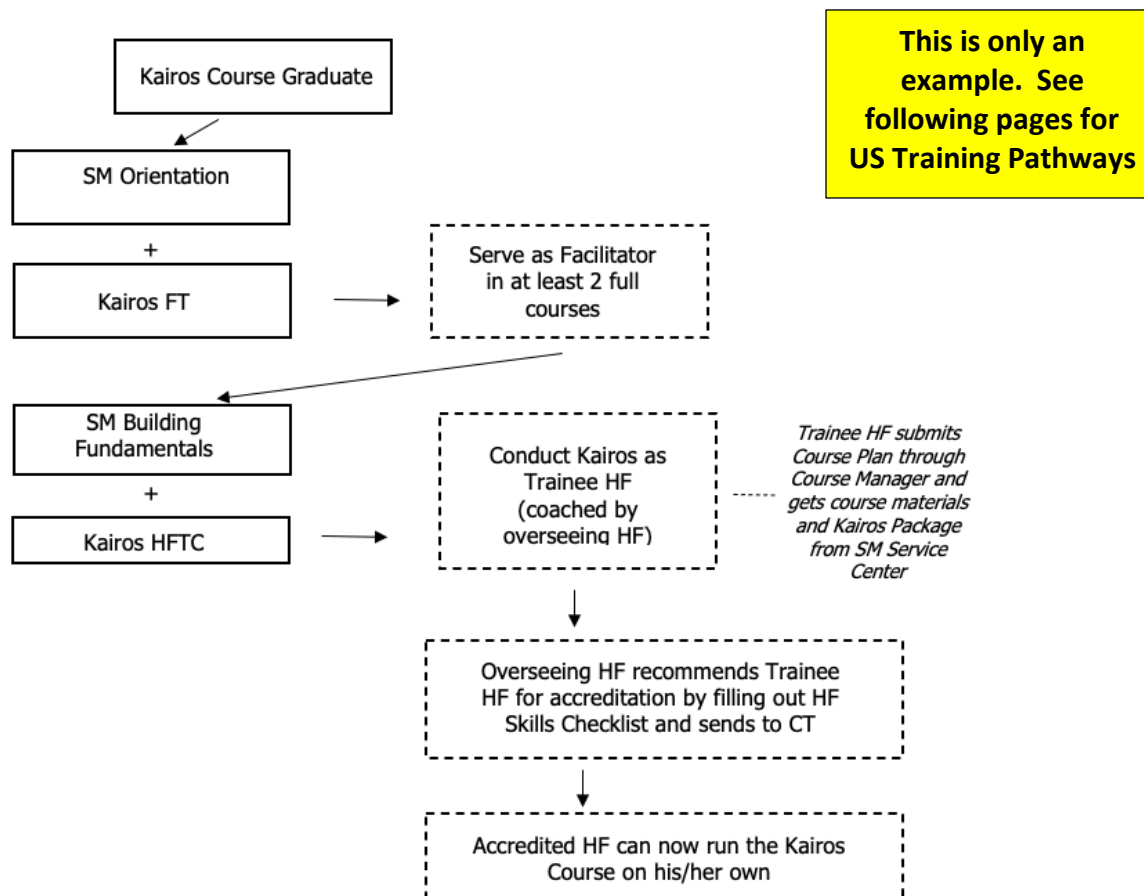
Multiple Products

The graphic below shows the **Products** of SM. Each Product may be conducted as part of a broader **Program** of mobilization within a church. Also, for each Product, there are additional **Trainings** that are associated.



Training Pathway – Kairos Course

As an example of how these fit together, consider the Training Pathway diagram below for the Kairos Course. An individual begins with completing the course but progresses through additional training to be able facilitate a course, then complete further training to attain Head Facilitator status. The Training Pathway for other courses is similar but will likely have differences based on the course and the methodology.



The NCT has the option to make some adjustments to the Training Pathway but will always honor the intent of the course designers. In addition, the NCT may grant Language Coordination Teams (LCT) some flexibility in making adjustments to the Training Pathway as implemented in their Language Group.

Below, in more detail, is the Training Pathway for the Kairos Course for the USA. Please note that these are variations from the SMI version.

Pathway	Facilitator	Head Facilitator
Prerequisites	<ul style="list-style-type: none"> Complete KC HF Recommendation 	Certified Kairos Facilitator Experience with all intros, devotions, and activities HF Recommendation
Training	<ul style="list-style-type: none"> Kairos FTC (parts 1, 2, 3) 	<ul style="list-style-type: none"> Generic HFTC Kairos-specific HFTC
Outcome ►	<ul style="list-style-type: none"> Kairos Facilitator 	<ul style="list-style-type: none"> HF Trainee
Practicum	<ul style="list-style-type: none"> Two (2) KC's facilitated with positive HF recommendation 	<ul style="list-style-type: none"> Two (2) KC's HF'd under supervision Supervising HF Recommendation
Outcome ►	<ul style="list-style-type: none"> Kairos Facilitator (experienced) 	<ul style="list-style-type: none"> Certified Kairos HF
Sustaining	<ul style="list-style-type: none"> Serve as Facilitator at least once/year 	<ul style="list-style-type: none"> Serve as HF at least once/year
Lapse Conditions	<ul style="list-style-type: none"> Last KC over 1 year in past without NCT waiver 	<ul style="list-style-type: none"> Last HF over 1 year in past without NCT waiver
Reinstatement	<ul style="list-style-type: none"> Complete Facilitator Recertification Recommendation of Recertification leader 	<p>Lapse > 5 years</p> <ul style="list-style-type: none"> Admin / Observer with experienced HF (*) Co-HF with experienced HF (*) <p>Lapse 3-5 years</p> <ul style="list-style-type: none"> Co-HF with experienced HF (*) <p>Lapse < 3 years</p> <ul style="list-style-type: none"> Experienced HF supervises during KC planning phase (*) Experienced HF monitors KC progress at key points (*) <p>(*) Recommendation of experienced HF is required to proceed in reinstatement</p>

Training Pathway – Youth Kairos Course

The Youth Kairos course has not been officially rolled out in the USA. However, in anticipation of a future rollout, the NCT has developed the following Training Pathway.

Pathway	Facilitator	Head Facilitator
Prerequisites	<ul style="list-style-type: none"> Complete YK or KC HF Recommendation 	Certified Kairos Facilitator Experience with all intros, devotions, and activities HF Recommendation
Training	<ul style="list-style-type: none"> Kairos YK-FTC 	<ul style="list-style-type: none"> Generic YK HFTC YK specific HFTC
Outcome ►	<ul style="list-style-type: none"> YK Facilitator Trainee 	<ul style="list-style-type: none"> YK HF Trainee
Practicum	<ul style="list-style-type: none"> Two (2) YK's facilitated with positive YK HF recommendation 	<ul style="list-style-type: none"> Two (2) YK's HF'd under supervision Supervising YK HF Recommendation
Outcome ►	<ul style="list-style-type: none"> Certified YK Facilitator 	<ul style="list-style-type: none"> Certified YK HF
Sustaining	<ul style="list-style-type: none"> Serve as YK Facilitator at least once/year 	<ul style="list-style-type: none"> Serve as YK HF at least once/year
Lapse Conditions	<ul style="list-style-type: none"> Last YK Facilitator over 1 year past without NCT waiver 	<ul style="list-style-type: none"> Last YK HF over 1 year past without NCT waiver
Reinstatement	<ul style="list-style-type: none"> Complete YK Facilitator Recertification Recommendation of Recertification leader 	<ul style="list-style-type: none"> Complete YK HF Recertification Recommendation of Recertification leader

Training Pathway – General Courses (TUS, ETI)

The SM General Courses consist of The Unfinished Story (TUS) and Empowered to Influence (ETI). General Courses are conducted fully within the local church or other organization. The SM Mobilizer assigned to the church approves Course Plans and loosely oversees the SM activities at the church. Therefore, there is a much lower level of oversight than with other SM courses.

Pathway	Church Facilitator	Church Coordinator
Prerequisites	<ul style="list-style-type: none"> • Complete the GC • CC Recommendation 	<ul style="list-style-type: none"> • Facilitated the GC
Training	<ul style="list-style-type: none"> • Church Facilitator Training for the GC 	<ul style="list-style-type: none"> • Church Coordinator training
Outcome ►	<ul style="list-style-type: none"> • Church Facilitator 	<ul style="list-style-type: none"> • Church Coordinator
Sustaining	<ul style="list-style-type: none"> • Facilitate the GC at least once/year 	<ul style="list-style-type: none"> • Coordinate the GC at least once/year
Lapse Conditions	<ul style="list-style-type: none"> • As determined by Church Coordinator 	<ul style="list-style-type: none"> • As determined by the SM Mobilizer
Reinstatement	<ul style="list-style-type: none"> • As determined by Church Coordinator 	<ul style="list-style-type: none"> • As determined by the SM Mobilizer

Training Pathway – Interface

The Training Pathway for this course has not yet been fully defined.
What follows is a work in progress.

The Interface Program consists of (1) the Interface Seminar, (2) the Interface Pre-Workshop Consultations, and (3) Interface Workshops. It can also extend into Interface Seminars being presented within the church by the church leadership. At present, only the Interface Seminar is fully developed. It is conducted by mobilizers designated by the NCT.

Pathway	Interface Leader (Open Courses)	Interface Leader (Church Courses)
Prerequisites	<ul style="list-style-type: none"> Complete in the Interface Seminar 	<ul style="list-style-type: none"> Complete in the Interface Seminar
Training	<ul style="list-style-type: none"> Training of Mobilizers, Parts 1 & 2 Interface Procedural Training Coached through Interface Dry Run 	<ul style="list-style-type: none"> Training of Mobilizers, Parts 1 & 2 Interface Procedural Training Coached through Interface Dry Run
Outcome ►	<ul style="list-style-type: none"> Interface Leader (trainee) 	<ul style="list-style-type: none"> Interface Leader (trainee)
Sustaining	<ul style="list-style-type: none"> Lead an Interface Seminar once per year (alone or team) 	<ul style="list-style-type: none"> Lead a church Interface Seminar once per year (alone or team)
Lapse Conditions	<ul style="list-style-type: none"> Lapse exceeds one year (without NCT waiver) 	<ul style="list-style-type: none"> Lapse exceeds one year
Reinstatement	<ul style="list-style-type: none"> As determined by the NCT Team-lead an Interface Seminar 	<ul style="list-style-type: none"> As determined by the NCT with church advisory Team-lead a church Interface Seminar
Interface Consultant	<ul style="list-style-type: none"> Additional training to obtain Interface Consultant status 	
Lapse Conditions	<ul style="list-style-type: none"> TBD by NCT 	
Reinstatement	<ul style="list-style-type: none"> TBD by NCT 	

Training Pathway – Mobi 101 & Mobilology Workshop

The Training Pathway for this course has not yet been fully defined.
What follows is a work in progress.

Pathway	Mobi 101	Mobilology Workshop
Prerequisites	<ul style="list-style-type: none"> Graduate of SM Specialized or General Course Facilitator Training (preferred) 	<ul style="list-style-type: none"> SM Mobilizers
Training	<ul style="list-style-type: none"> Complete Mobi 101 Seminar Complete Mobi 101 Presenter Training Coached through Mobi 101 Dry Run 	<ul style="list-style-type: none"> Complete Mobilology Workshop
Outcome ►	<ul style="list-style-type: none"> Mobi 101 Presenter (trainee) 	<ul style="list-style-type: none"> SM Mobilizer with advanced communication skills
Sustaining	<ul style="list-style-type: none"> Lead a Mobi 101 Seminar once per year (alone or team) 	
Lapse Conditions	<ul style="list-style-type: none"> Lapse exceeds one year (without NCT waiver) 	
Reinstatement	<ul style="list-style-type: none"> As determined by the NCT Team-lead a Mobi 101 Seminar 	
Advanced		<ul style="list-style-type: none"> SM Mobilizers who are experienced trainers Tasked by NCT or GRT to train, mentor and coach SM Mobilizers
Lapse Conditions		<ul style="list-style-type: none"> TBD by NCT or GRT
Reinstatement		<ul style="list-style-type: none"> TBD by NCT or GRT



Section 6 – Financial

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Financial

Financial Procedures for Courses

This section applies to financial transactions between the NCT and the Host organization for a SM course. The Host organization, in cooperation with the Event Manager, will handle all financial transactions pertaining to the execution of the course.

POLICY – Handling of Funds by Event Manager

The USNCT *strongly discourages* the Event Manager from directly handling funds for two reasons:

- the overall demands upon the Event Manager in preparing for the course; and
- fundamental fiscal control policies pertaining to handling of money.

Therefore, the Event Manager *must* only handle money as an *exception* and with prior approval of the USNCT.

Course Registration & Payment Guidelines

Following are guidelines for collection of course fees and payments.

1. Payment of Registration Fees should be made to and handled by the Host Organization (usually a church). The Host is in the best position to receive, control, deposit, and acknowledge payments, especially cash.
2. Any refunds resulting from a canceled course, or authorized withdrawals from a course, will be handled by the Host. The Event Manager will advise the Host in such cases.
3. SMUSA will invoice the Host for the Course Fees. The Event Manager will coordinate with SMUSA financial personnel to have the invoice produced and delivered in a timely manner, normally **after** the course has started and **before** it has completed.
4. The Host should pay the SMUSA invoice promptly (payment options and terms will be specified on the invoice).

Expense Reimbursement

Expenses incurred to conduct a Course should be managed jointly by the Event Manager and the Host organization. Guidelines for expense reimbursement are as follows.

1. No individual (Event Manager or team member) is to be **directly or indirectly compensated** for their services provided.
2. Travel, housing and meal expenses for Event Managers or team members may be paid by, or reimbursed by, the Host. All such payments or reimbursements should follow “reasonable and customary” guidelines and comply with all applicable federal/state/local regulations. The Event Manager and Host will work together on this.

In rare cases, the USNCT may cover some costs related to a specific course. Such arrangements must be made directly between the Event Manager and the USNCT. The Event Manager must provide information in advance including the type of expense, people involved, and estimated amounts, and obtain pre-approval from the USNCT before proceeding. If personally-paid expenses are to be reimbursed, the SMUSA Reimbursement Procedure and Form will apply. Details will be provided as needed.

Course Net Proceeds

A well-planned course **should** end up with a positive or zero net balance of funds. It is the responsibility of the Event Manager to plan appropriately and the Host organization to provide the funds management. In many cases, the exact amount will not be known until after the course ends, especially if there are travel reimbursements involved. The Event Manager will coordinate with the Host financial staff to produce an overall accounting of the income and expenses. The Event Manager **must** include this information in the Course Report in CM2.

If the Net Proceeds are **positive** (that is, there is a surplus of funds), then it is the discretion of the Host organization to determine what action to take. If any of it is given to SMUSA, it will be treated as a donation and directed as described in **Course Offerings** above.

If the Net Proceeds are **negative**, it is normal that the Host that will bear those costs **unless prior arrangements are made with the USNCT**. Such situations should be rare and will be handled on a case-by-case basis.

Course Fees

If you have any questions about Course Fees, please contact the USNCT at info@SimplyMobilizing.us.

USNCT Fee

Following are the USNCT Fees applicable to each course or training event.

Course	USNCT Fee
Kairos Course	\$50
Kairos Facilitator Training	\$0
Kairos Head Facilitator Training	TBD
Youth Kairos Course	\$50
Youth Kairos Facilitator Training	\$0
Youth Kairos Head Facilitator Training	TBD
The Unfinished Story	\$10
Empowered to Influence	\$10
Church Facilitator / Church Coordinator training	\$0
Interface Seminar	TBD
Mobi 101 Seminar	TBD

The USNCT Fee is payable to Simply Mobilizing USA and covers materials, royalties, operations and advancement. The fee is applicable for all registrations/participants. When course fees are collected by the host organization, the USNCT Fee payment is due once the course has officially started but may be deferred until halfway through the course to allow for late registrations.

Host Fees

The Course Plan may reflect a course fee including an additional amount to cover host-incurred expenses. This is called the **Host Fee**. Hosting expenses can vary greatly. For online courses, there may be little or no cost to be recovered. For on-site courses, costs could be considerable. The Course Plan must declare what kind of costs will be recovered through additional course fees, and a basic budget for the course showing how the course fees are calculated. In general, the following categories of costs may be recovered through the Host Fee portion:

1. **Food** – including snacks, drinks, and meals (including the Kairos cultural meal)
2. **Lodging** – if the host provides lodging for participants
3. **Other** – printing, facility use, custodial, advertising, supplies
4. **Facilitator expenses** – travel, meals, lodging for the Facilitating Team

Subsidizing or Discounting Fees

Any **subsidy** or **discount** of Course Fees for Participants must be arranged through the Event Manager and Host working together. However, it is still expected that the full USNCT Fee will be paid to SMUSA.

In **very rare cases**, the USNCT may consider reducing the USNCT Fee for a course. This will usually not be associated with a specific course, rather with a national promotional program. In these cases, the USNCT will communicate the purpose and process associated through normal channels.

Documentation of Course Fees

The following instructions are specifically for Courses where the Course Plan and Approved Course are in the Course Manager (CM2). Section 6 of the Course Plan, and the **Publicize** section, **Finance** section, and **Report** section of the Approved Course must be fully and accurately completed.

Fees documented in the Course Plan

The Course Plan should be submitted as early as possible to allow the USNCT to review it thoroughly. The creator of the Course Plan should anticipate that the USNCT may request additional information or require changes to the Course Plan prior to approval

Fees documented in an Approved Course

The Approved Course must be completed in a way that clearly shows the Course Fee. For Kairos courses in the CMS, the Publicize / Cost (\$) section must describe what is included in the Course Fee. The USNCT Fee (\$50) must be shown as part of the total Course Fee.

Fees documented in a Completed Course

Upon completion, the **Finance** section of the Course Record must be updated to show the expenses by category.

Course Offerings

Some SM courses provide opportunity for participants to make donations to the broader work of SMUSA. Accordingly, SMUSA has designated a number of SMUSA Projects for which the donations may be designated. The Event Manager should review them at <https://simplymobilizing.us/projects> and ensure that communications pertaining to the offering comply with the options shown there. Offerings collected for any other purpose will be considered general offerings to SMUSA.

As noted in the policy above, the offering *should* be handled by the Host. Therefore, checks should be made payable to the Host, and the Host will receive, deposit, and acknowledge both checks and cash using their existing donation process. The Event Manager will coordinate with Host financial personnel to achieve this. The total amount of the offering will be paid by the Host to **SMUSA** with a memo indicating any project designations.

NOTE: If the Host *elects to not handle the offerings*, the Event Manager will have to make arrangements with **SMUSA** directly. The Event Manager should address this before the course starts to avoid misunderstandings.