



Instructor Handbook

International Facility Management Association
Professional Development
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IFMA POLICY FOR INSTRUCTORS

Purpose of this Handbook: It is to provide guidance and to help instructors understand IFMA's educational stance and the different processes in which they are involved.

Expectations and Responsibilities of Instructors

- I. Instructors should be able to communicate with course participants and other interested parties about IFMA's mission, vision, and role in the FM profession, so that current and future FM practitioners recognize the benefit of membership.

MISSION

To provide exceptional products, services, and opportunities that support and advance the facility management profession.

VISION

To serve as the resource and representative for facility management.

PURPOSE

IFMA is a member-centered association that exists to guide and develop facility management professionals. In support of its members, IFMA promotes the Facility Management profession by providing leadership, recognition and standards of excellence.

Facility Management:

Facility management is a profession that encompasses multiple disciplines to ensure functionality of the built environment by integrating people, place, process and technology.

Facility Management core competencies:

- Communication
- Finance
- Human and environmental factors
- Leadership and management
- Operations and maintenance
- Planning and project management
- Quality assessment and innovation
- Real estate
- Technology

IFMA:

IFMA is the largest and most widely recognized professional association for facility management, supporting approximately 17,300 members. The Association's members are represented in 126 chapters, 16 councils and one Special Interest Group (SIG), in 54 countries worldwide. Globally, IFMA certifies facility managers, conducts research, provides educational programs, recognizes facility management degree and certificate programs and produces World Workplace, the largest facility management-related conference and exposition.

IFMA was established in 1980 as a not-for-profit, incorporated association dedicated to promoting excellence in the management of facilities. Globally, IFMA spots trends, conducts research, provides educational programs, and assists corporate and organizational facility managers in developing strategies to manage human, facility and real estate resources.

- II. IFMA instructors should be aware of the different roles and responsibilities of IFMA's professional development (PD) staff in order to contact the appropriate employee about issues that concern IFMA PD products and services.

IFMA Professional Development Contact Information

IFMA Professional Development
1 East Greenway Plaza Suite 1100
Houston, TX 77046-0194
713-623-4362
713-623-6124 fax
www.ifma.org

PROFESSIONAL DEVELOPMENT STAFF

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- III. IFMA instructors should be familiar with IFMA PD products and services, so that current and future FM practitioners can take advantage of IFMA professional development services and improve their knowledge and skills. Instructors should be familiar with up to date information for the following PD Products:

- ◆ IFMA Professional Development Courses (face to face and online)
- ◆ IFMA Credentials (FMP and CFM)

Detailed information concerning the PD products can be found on the IFMA web site, <http://www.ifma.org> under Learning, or from the PD brochures.

- IV. All IFMA approved instructors should have a clear understanding of the following in order to comply with IFMA established policies.
- ◆ Steps involved in the delivery of learning and the role and responsibilities of instructors.
 - ◆ IFMA contracts and agreements

IFMA APPROACH TO TRAINING

I N T E R N A T I O N A L F A C I L I T Y M A N A G E M E N T A S S O C I A T I O N

IFMA uses the following standard approach to needs assessment, development, delivery and updates to educational materials.

- I. Develop or revise course materials (RFP release) concurrent with assessment of FM's needs. Align with credentials, FMP and/or CFM.
- II. Contractor(s) develop course materials. The team may be composed of: Subject Matter Experts, Instructors, FM Practitioners, and CFMs.
- III. Pilot the course; train the trainer; and validate the course.
- IV. Deliver products to current and future FMs.
Delivery modes may include:
 1. Instructor-led at conferences and events and/or at the chapter level
 2. Online
- V. Presentation of material to demonstrate learning of skills is conducted using the following:
 1. Leading discussion (using study circles/discussion groups)
 2. Interactive content presentations
 3. Group learning activities
 4. Role play
 5. Case study analysis
 6. Problem solving scenarios
 7. Multimedia
 8. Surveys and self assessment
- VI. Evaluation of Learning
 1. Formative: Learning activities that apply knowledge
 2. Summative: Attainment of learning objectives
- VII. Ongoing updates and evaluation of materials – feedback, advice regarding trends, changes in facility Management practices.
IFMA conducts a review of course materials within a three year cycle.
- VIII. Standard procedures for all face to face IFMA Courses:
 1. All instructors are expected to thoroughly review the online course and the written participant and instructor guides prior to the course.
 2. A conference call or meeting with IFMA staff shall be conducted with each instructor one month to 2 weeks prior to course delivery. This meeting will cover: expectations for instructors, course status, any special needs, description of participants to help develop in class examples, questions on the slide presentation/manuals.
 3. Standard opening: Each instructor will be expected to: greet each participant, review the schedule for the day, and make any announcements that are provided from IFMA staff.
 4. If concerns arise with a student during a session, do not hesitate to contact the IFMA staff present. It is critical for the instructor to be able to keep the participants focused; staff is available to handle personal complaints or issues.

RECRUIT, QUALIFY, & MAINTAIN INSTRUCTORS

INTERNATIONAL FACILITY MANAGEMENT ASSOCIATION

I. INSTRUCTOR RECRUITMENT

- A. All applicants must submit the following information:
- 1) Letter of Interest explaining why they want to teach for IFMA
 - 2) Signed Intellectual Property Rights and Non-Disclosure Agreement
 - 3) Signed Proprietary Interest Release Form
 - 4) Resume
 - 5) Two letters of recommendation
 - 6) Application
- B. Instructor applicants must prove Subject Matter Expertise in the area of course interest by submitting a **Resume** stating their educational background, work history, affiliation, and credentials. A background check will be conducted by IFMA.
- C. To be qualified as an instructor for the CFM Exam Review Course, applicants must have a valid CFM designation in order to teach the course.
- D. Send all information to: IFMA Professional Development
1 East Greenway Plaza Suite 1100
Houston, TX 77046

II. INSTRUCTOR QUALIFICATION PROCESS

The purpose of our instructor qualifying process is to provide consistent, high quality learning to develop FM professionals throughout their career.

- A. Complete a Train the Trainer Course
To become qualified, applicants shall provide documentation of completing a "Train the Trainer" seminar or documentation of adult teaching experience. The "Train the Trainer" course must include a participant presentation and feedback on the instruction in order to be included for qualification. If a candidate has not attended a "Train the Trainer" program, IFMA will work with the candidate to plan a means to complete this requirement. This coursework may be waived for instructors who were approved and qualified before 2005.
- B. Complete Online Instructor Requirement
To ensure integrity and consistency of content, each instructor candidate will be given access to IFMA's online course in their area of expertise. This will accomplish three things: create a discussion for instructors to share in their area of expertise, become familiar with format for online mentoring, and provide excellent review of learning materials.
- C. Complete a supervised modular teaching session from a course.
For each IFMA course offered, one new candidate may become qualified by teaching at least one module from the course. This is waived for instructors experienced in teaching IFMA courses.

III. INSTRUCTOR MAINTENANCE

- A. IFMA shall select instructors based on the following criteria:
- i. Instructor Ability
 - ii. Content Expertise
 - iii. Knowledge of Facility Management
- B. Instructors shall be notified by Professional Development, well in advance to deliver an IFMA course. Instructors shall also be provided with necessary instructional materials in advance to prepare for course delivery.
- C. Courses are delivered based on schedule and demand. IFMA does not guarantee all instructors the opportunity to teach. IFMA reserves the right to choose instructors to deliver a course.
- D. Instructors agree not to violate IFMA Intellectual Property and Nondisclosure Agreement and Proprietary Interest Agreement.
- E. Instructors agree not to promote their own company or the company for which they work. Instructors are allowed to mention their professional affiliation and to distribute business cards at the beginning or end of class but cannot "promote" their company during the course. Instructors are expected to represent IFMA and not their own company.
- F. Instructors shall wear business attire (suit and tie) during class sessions.
- G. Inappropriate Comments/Materials
Instructors warrant and represent that, as a representative of IFMA, the content of their lectures and their methods of instruction shall not contain any materials or content that could reasonably be considered prurient, defamatory, or obscene. Instructors further represent and warrant that any and all educational materials utilized in the course shall not violate, infringe, or impede the legal or equitable rights of any person, firm, corporation, or other organization.
- H. Course Evaluation
All instructors and courses will be evaluated according to the Course Evaluation form provided. The evaluation form requires attendees to assess the quality of the course in terms of the following six dimensions: learning objectives, instructor, learning activities, content, materials, location and facility. Instructors will be reviewed only in the areas in which they have influence. Evaluation results will be tabulated and can be made available to the instructor if he/she desires
- I. Instructor Evaluation
IFMA reserves the right to observe instructors in the classroom, monitor instructor ratings, place instructors on probation or to dismiss an instructor. Probation consists of developing a plan to remediate specific concerns and time frame to accomplish it. Concerns about course evaluations should be directed to the Director of Professional Development.
- J. Instructors shall attend additional training or meetings as necessary. The following are reasons this may be required:
- ◆ Course Update/Revision
 - ◆ Course Pilot (new courses)
 - ◆ Recurring Training (every three years)
 - ◆ Online Teaching/Facilitation
 - ◆ Train the Trainer (to serve as trainer)
 - ◆ IFMA Professional Development Updates

IFMA INSTRUCTOR CODE OF ETHICS

I N T E R N A T I O N A L F A C I L I T Y M A N A G E M E N T A S S O C I A T I O N

All IFMA members and anyone affiliated with IFMA are expected to comply with the IFMA Code of Ethics. When in doubt, they have the responsibility to seek clarification from IFMA.

As an Instructor

- IFMA instructors shall represent IFMA with highest professional standards and ethical behavior when dealing with course participants, IFMA staff, and other associations and organizations.
- IFMA instructors shall deliver IFMA courses only during IFMA scheduled, approved, or sponsored sessions.
- IFMA instructors shall abide by all instructional agreements and procedures established by IFMA Professional Development. This includes, but is not limited to, course revision and updates, course scheduling, delivery, and/or cancellation, authorized expenses, Intellectual Property Rights and Non Disclosure Agreement, and Proprietary Interest.
- IFMA instructors shall support IFMA Professional Development efforts to improve content and delivery of courses.
- IFMA Instructors shall ensure that they are current in their expertise and content research.

This document is a guideline and does not represent the entire breadth of what constitutes good conduct and ethical behavior.

INTELLECTUAL PROPERTY RIGHTS AND NONDISCLOSURE AGREEMENT

I N T E R N A T I O N A L F A C I L I T Y M A N A G E M E N T A S S O C I A T I O N

IFMA owns unlimited, exclusive rights to all works, including literary works, pictorial, graphic and sculptural works, architectural works, works of visual art and any other work that may be the subject matter of copyright protection; advertising and marketing concepts; information; data; code; formulas; designs; models; drawings; computer programs, including all documentation, related listings, design specifications, and flowcharts; trade secrets; and any inventions, including all processes, machines, manufactures and compositions of matter and any other invention that may be the subject matter of patent protection; and all statutory protection obtained or obtainable thereon. IFMA therefore assumes all worldwide rights, title and interest in and to Intellectual Property created, made, conceived, reduced to practice or authored in connection with the performance of this assignment or with the use of information, materials or facilities of IFMA. IFMA shall be free to make, have made, use, offer for sale, sell, modify, translate and import products utilizing all Intellectual Property.

Contractors and sub-contractors understand and agree that all materials submitted become the property of IFMA. Contractors and sub-contractors agree that all materials produced for the course, including second and subsequent editions, if any, updates, supplements, derivatives, in whatever medium (the "work") will be considered a work made for hire, as that term is defined in the federal copyright statute; that as such, IFMA will be considered to be the "author" of the "work" and will own all rights, title and interests in the work, including the right to copyright it; and that contractor will cooperate as necessary with IFMA in assisting IFMA to secure copyright in its own name in the work. Contractors and sub-contractors will not offer the same course to any other person or entity, for compensation or without compensation, without the express written permission of IFMA. Contractors and sub-contractors represent and warrant either that the work is his/her own original work or in the public domain or that Contractor has secured the necessary permissions to use works copyrighted by others. Contractor agrees to defend, indemnify and hold harmless IFMA for breach of this warranty.

IFMA Instructors are provided with course materials for the sole of purpose of teaching IFMA courses. They are not at liberty to conduct a course without IFMA's coordination and approval. Instructors agree to not revise course content and pertinent presentation materials without expressed written consent of IFMA.

Any parties in possession of IFMA course materials, such as previous course participants, also agree to abide by this agreement.

Instructor's Printed Name

Instructor's Signature

Date

PROPRIETARY INTEREST RELEASE AGREEMENT

INTERNATIONAL FACILITY MANAGEMENT ASSOCIATION

Disclosure

Existing proprietary interests of providers will be disclosed during contractual arrangements. Providers' existing proprietary interests must be listed in the contract prior to contract execution in order for IFMA to recognize. If proprietary content of the provider is used to produce contracted deliverables for IFMA, IFMA will make no claim to this content if disclosed as provider proprietary interests in the contract.

Examples of appropriate disclosures are the following:

- "The Instructor holds patent rights to this instrument".
- "The Instructor has a financial interest in this instrument".
- "The Instructor is a consultant to the (name of company)".
- "The Instructor owns more than 10% of stock in (name of company)".

A disclaimer of proprietary interest may be appropriate, especially if such interests are unclear. An example of an appropriate disclaimer follows:

- "The Instructor has no proprietary interest in the development or marketing of this instrument, and no financial interest in the (name of company)".

Representation

Provider proprietary interests will be appropriately referenced in instructional materials published by IFMA. IFMA retains the right to review and approve the branding of any proprietary interests included in the contracted deliverables. Provider branding is limited.

Providers will not promote the exclusive use of any commercial product in published instructional materials or during instruction. Provider discussion of their proprietary interests during instruction is limited to relevant contexts and includes consideration of alternative products or companies that are comparable to the provider's.

Instructor's Printed Name

Instructor's Signature

Date

Instructor Application

Type or print clearly

Name _____ SSN _____

Home Address: _____

City _____ State _____ Zip _____

Home Phone _____ Fax _____ Email _____

Chapter _____

Teaching Preferences _____

Current Employment History

Employer _____

Address _____

City _____ State _____ Zip _____

Work Phone _____ Fax _____ Email _____

Current Job Title _____

Immediate Supervisor _____

May we contact your employer? Yes No

Previous employment Company name and address

Academic Background (highest degree earned)

Degree(s)	College/University	Major/Specialty	Date Completed
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Professional designations, credentials, and certificates _____

Distinctions (scholarships, awards within the industry, honors) _____

Professional affiliations/memberships _____

Teaching experience (course name and location)

Interests: On-site Course Instruction Online Course Instruction

I affirm that the above information is true to be the best of my knowledge. The International Facility Management Association has my approval to verify/contact any of the information provided.

Signature

Date

Please submit to:

Ronna Winchester
IFMA Professional Development
1 East Greenway Plaza, Suite 1100
Houston, TX 77046-0194, USA

DELIVERY OF IFMA INSTRUCTIONAL MATERIAL

I N T E R N A T I O N A L F A C I L I T Y M A N A G E M E N T A S S O C I A T I O N

Instructors should not accept teaching methods as they stand when they do not produce the desired outcomes. If a student or group of students has trouble succeeding under a given teaching method, instructors should change or improve the method so that learning objectives are achieved and students succeed.

INSTRUCTIONAL MANUAL

All approved instructors asked to teach for IFMA will be provided with all necessary materials well in advance to use during the class. All of the manuals are comprehensive and written in a narrative textbook style. Each of the manuals is divided into major sessions, and each session is divided into chapters. Each chapter has the following components:

Introduction

During introduction, instructors must state the overall course objective to provide students a general idea of what knowledge and skills to attain. Instructors must also gain the student's attention through an analogy or personal experience that's related to the course motivating students to study the material and participate in class.

Learning Objective

A learning objective is a precise statement that specifies a learned capability a student must demonstrate, the condition under which the student is to exhibit the capability, and the standard of acceptable performance upon completion of training. It is pertinent that instructors clearly state the learning objectives so that students can direct their attention to the important content, communicate the standard of performance expected following the training, and serve as a self-check for progress.

Information

This portion carries the information to be learned by students. The topics and subtopics covered in this portion support the learning objectives, are student-centered, lead students in the direction of the behavior specified in the objective, guide students toward the mastery of the task with instructor and student reinforcement, are properly paced, and are easy to understand. It cannot be assumed students have any prerequisites skills that directly relate to the content prior to the course. Therefore, instructors must ensure information is covered thoroughly so that students essentially achieve the objectives and instructors are able to measure students' acquired knowledge and skills.

Learning Activity

A learning activity allows participants to apply the concepts taught and is administered by the instructor to assess the student's accomplishment of knowledge and skills. Learning activities should be accomplished under job-like conditions.

Review

This part contains the summary of the major points covered in the lesson and may also be utilized to address student concerns and questions.

Evaluation/Feedback

The purpose of this evaluation is to determine students' accomplishment of learning objectives. Secondary purposes are to assess the training system and instructor effectiveness. Instructors must communicate with participants the specific passing standards IFMA has established.

AUDIOVISUAL EQUIPMENT

IFMA will provide instructors with necessary audiovisual equipment, overhead computer projection units, easels, charts, etc. for the delivery of the course for which contracted. Instructors, on the other hand, must use their own laptop computer to deliver any software for the course. Computer hardware and related equipment can be provided by IFMA. Requested equipment will be set up in the meeting room prior to commencement of the course session and the instructor should submit a request to the Manager, Education Relations at least thirty (30) days prior to the start of the contracted course.

In terms of software, all presentation materials are created in MS PowerPoint and are delivered by means of a computer projection unit and a laptop. All instructors are expected to be familiar with MS PowerPoint to deliver presentations. Other courses may have additional software requirements such as MS Excel or Microsoft Project during the lecture portion of the course for demonstration purposes. The type of technology to be used for course delivery will be determined during the course development stages.

***** Note: The proper use of MS PowerPoint slides listing bullet points and/or a collection of articles is to enhance delivery of training. These tools should not replace instructor/student interaction and the use of the workbook during course delivery.***

ADJUNCT FACULTY

Adjunct faculty not specifically on contract with IFMA will be at the contracted course instructor's expense and must be approved by IFMA.

ONLINE TEACHING/FACILITATION GUIDELINES

I N T E R N A T I O N A L F A C I L I T Y M A N A G E M E N T A S S O C I A T I O N

It is a widely accepted fact in the training field that the degree of learner engagement and interaction in an E-Learning course directly correlates with the success of the participant's learning experience. To address the issue of distance learning and assure a successful E-Learning experience for our members, please adhere to the following guidelines for teaching/facilitating IFMA's online courses.

There will be two types of instructors for online courses:

Online Instructor/Mentor: contracted for 6 months to 'hang out' among the participants, answering questions, giving general guidance. Learners will have 3 opportunities to contact you throughout the course. This is the process for the online competency courses (Coming Fall 2005).

Course Instructor: contracted per course to facilitate course assignments, discussion, and assessment (Courses to be developed).

All Instructors should:

1. Review the online materials, assignments and assessments and be thoroughly familiar with them before the start of the course.
2. Review all online materials above and provide instructional design feedback to IFMA for improving the quality or interactivity of course. You are the subject area expert!

Course Instructors should:

1. Build a social community by creating an introductory discussion, where learners introduce themselves.
2. Visit the discussion board daily and respond to postings.
3. Answer content-related emails from learners who might need attention in private.
4. Refer learners to online technician for technical problems.
5. Monitor assignments, discussions, and quiz results.
6. Monitor learner participation and engagement and intervene as appropriate.

CRITERIA FOR OBTAINING IACET CEU CREDITS

INTERNATIONAL FACILITY MANAGEMENT ASSOCIATION

IACET CONTINUING EDUCATION UNITS

IFMA has been designated a Certified Provider of Continuing Education Units by the International Association for Continuing Education and Training (IACET). As a Certified Provider, we have a responsibility to provide education that adheres to the IACET standards. Meeting these standards requires a partnership between the requesting IFMA group and IFMA Headquarters to ensure that all requirements are satisfied.

These are the criteria set forth by IACET:

- Each activity is planned in response to educational needs which have been identified for a target audience.
- Each activity has a clear and concise written statement of intended learning outcomes.
- Qualified instructional personnel are involved in planning and conducting each activity.
- Content and instructional methods are appropriate for the intended learning outcomes of each activity.
- Participants must demonstrate their attainment of the learning outcomes.
- Each learning activity is evaluated by the participants.
- The group has an identifiable unit, group or individual with clearly defined responsibilities for developing and administering learning activities.
- The group has a review process in operation that ensures the CEU criteria are met.
- The group maintains a complete record of each individual's participation and can provide a copy of that record upon request for a period of at least seven years.
- The group provides an appropriate learning environment and support services.

Any questions regarding the approval process for CEUs should be directed to the Certification Manager at IFMA's International Headquarters.

WHAT TO TELL STUDENTS

Students must accomplish the following in order to receive CEU credits:

- 100% attendance
- Participation in all learning activities
- Completing both formative and summative assessments
- Completion of course Evaluation

IFMA Professional Development Department will record CEUs awarded to attendees and will retain this information for seven years. Upon written request, they will furnish a transcript showing IFMA education completed and CEUs earned. All members/non members alike must include a check for \$5.00 along with their written request for a transcript. Please advise students to allow 6 weeks after any course before requesting CEU records for that course.