



IFMA Qualified Instructor Handbook

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INTERNATIONAL FACILITY MANAGEMENT ASSOCIATION

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IFMA POLICY FOR INSTRUCTORS

Purpose of this Handbook: To guide and facilitate instructors' understanding of IFMA's educational policies and the processes supporting the delivery of IFMA's educational offerings.

Expectations and Responsibilities of Instructors

- I. The designation of IFMA Instructor is a process that includes a review of the instructor candidate's qualifications, completion of required training, an assessment process, and an ongoing commitment to professional growth and development. The Instructor Qualification Process is outlined in Section II of the of the Recruit, Qualify, and Maintain Instructors portion of this manual.
- II. 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.

VISION

To serve as the resource and representative for facility management.

MISSION

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

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 and business
- Human factors
- Leadership and strategy
- Operations and maintenance
- Project management
- Quality
- Real estate and property management
- Technology
- Environmental stewardship and sustainability
- Emergency preparedness and business continuity

IFMA:

IFMA is the largest and most widely recognized professional association for facility management. The association's members are represented through chapters, councils, communities and special interest groups worldwide. Globally, IFMA certifies facility managers, conducts research, provides educational

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 development of facility management professionals. 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.

- III. IFMA instructors should be aware of the different roles and responsibilities of IFMA's Professional Development/Education staff in order to contact the appropriate employee about issues that concern IFMA Professional Development/Education products and services.

PROFESSIONAL DEVELOPMENT/EDUCATION CONTACT INFORMATION

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- IV. IFMA instructors should be familiar with IFMA education products and services, so that current and future FM practitioners can take advantage of IFMA education services and improve their knowledge and skills. An example of education products includes:

- ◆ IFMA Education Courses (face to face and online)
- ◆ IFMA Credentials (FMP, SFP, CFM)
- ◆ CFM Exam Prep Workshop

Detailed information concerning the education products can be found on the IFMA FM Training web site, www.fm.training or from the education brochures.

- V. All IFMA qualified instructors should have a clear understanding of the following in order to comply with IFMA established policies.
 - ◆ Steps involved in the recruitment and qualification of IFMA instructors
 - ◆ The differences between the delivery of effective presentations and course instruction

- ◆ The importance of continuing education and requalification for instructors
- ◆ IFMA education delivery methods, the role of chapters in delivering IFMA education, and copyrights and intellectual property rights on educational material developed and used by IFMA
- ◆ Steps involved in the delivery of learning and the role and responsibilities of instructors.
- ◆ IFMA contracts and agreements

IFMA APPROACH TO TRAINING

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

- I. Develop or revise course materials in concurrence with IFMA's Global Job Task Analysis. Align with credentials, FMP, SFP and/or CFM.
- II. Contractor(s) develop course materials. The contractor team may be composed of: professional educators, course designers, content developers, 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
 2. Online
- V. Presentation of materials 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 and the Global Job Task Analysis on a three to five year cycle, or as defined by industry standards (e.g., IACET, ANSI, ACE).
- VIII. Standard procedures for all instructor led IFMA Courses:
 1. All instructors are expected to successfully complete the self-study course and thoroughly review the written participant manual and instructor PowerPoint & notes prior to the course.
 2. A virtual meeting with an IFMA qualified master instructor and/or IFMA staff shall be conducted as needed for existing qualified instructors to discuss content issues, classroom challenges, additional teaching tools and so forth. These meetings will be recorded for those who are unable to participate in the virtual meeting.
 3. Instructors shall regularly monitor the IFMA instructor community where information will be shared and distributed.
 4. 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.
 5. If concerns arise with a student during a session, do not hesitate to contact the IFMA staff. It is critical for the instructor to be able to keep the participants focused; staff is available to handle personal complaints or issues.
- IX. Standard procedures for all corporate, chapter, council, government and other instructor led

courses:

1. IFMA employs a consultative approach with its agreements. This may necessitate additional requirements which will be addressed in the specific contract.
2. Instructors will be compensated according to the terms of their consulting agreements.
3. All instructors and all groups will be under the necessary license agreements prior to teaching an IFMA course.

RECRUIT, QUALIFY, & MAINTAIN INSTRUCTORS

I. QUALIFIED INSTRUCTOR PROCESS

<https://www.fm.training/ifma-qualified-instructor>

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

- A. All applicants, regardless of which course/credential they wish to teach, must submit the following information:
- Current resume including your employment history and educational background
 - Two letters of recommendation from current CFMs, FMPs, SFPs or IFMA Fellows
 - Two references (name, company, phone, e-mail) from recent instructing engagements
 - Letter of Interest explaining why they want to teach for IFMA
 - Instructor applicants must prove Subject Matter Expertise in the area of course interest by submitting a detailed list of courses you have taught as instructor-only, co-instructor roles (and candidates part), length of courses, topics, a summary of learning objectives, number of participants, course sponsor and location of courses.*
 - Completed and signed application
 - Signed Qualified Instructor Agreement
 - Signed Intellectual Property Rights and Non-Disclosure Agreement
 - Signed Proprietary Interest Release Form
 - Formal evaluations from past course instruction experiences. Evaluations should include co-teacher feedback, student feedback and course sponsor feedback.
 - Headshot (jpeg, png or eps) to be used by IFMA for marketing purposes (optional)
 - Brief bio to be used by IFMA for marketing purposes (optional)
- B. Send all information via email to the Program Support Specialist at samantha.rosenthal@ifma.org .

II. INSTRUCTOR QUALIFICATIONS

Instructor Qualifications:

- Education: Bachelor's degree plus FMP, SFP or CFM credentials (*see below for additional qualifications related to the CFM and SFP*)
- Experience: A total of eight (8) years of experience in Facility Management or related field, and two (2) years experience as a course instructor is required in order to qualify as an IFMA instructor. The Senior Director of Professional Development reserves the right to waive any of the education requirements for those candidates who can demonstrate equivalent education, training and experience as an instructor.
- Competency: Instructor candidates must demonstrate competency in a given topic through formal education, formal training and job experience.

Instructional Experience:

Instructor candidates shall demonstrate experience in providing instruction by listing courses the candidate has taught as instructor-only, co-instructor roles (and candidate's role), length of courses, topics, a summary of the learning objectives, number of participants, course sponsors, and location of courses.

Demonstrated Performance:

Instructor candidates shall submit summaries of evaluations from past course instruction experiences. The evaluations should include relevant co-teacher feedback, student feedback, and course sponsor feedback.

Additional Requirements Specific to CFM, SFP or FMLS:

In addition to the Instructor Qualifications outlined in section II above, to be qualified as an instructor for the CFM Exam Prep Workshop or the FMLS, applicants must have a valid CFM designation.

In addition to the Instructor Qualifications outlined in section II above, to be qualified as an instructor for the SFP courses, applicants must be well versed in a wide array of sustainability topics, specifically the eight core concept areas of sustainability as defined by IFMA: energy, water, materials and resources, workplace management, indoor environmental quality, quality of services, waste and site impact. Each instructor candidate for the SFP shall also possess a current credential in facility management (at least a CFM or FMP) and a strong background knowledge in sustainability (such as LEED AP, Green Globes evaluator, BREEAM evaluator or equivalent). The Senior Director of Professional Development reserves the right to waive any of the credential requirements for those candidates who can demonstrate equivalent education, training and experience as an instructor.

Train-the-Trainer Course:

To become qualified as an IFMA instructor, applicants shall provide documentation of completing a "Train-the-Trainer" course or documentation of adult teaching experience within the past 5 years. The "Train-the-Trainer" course must include participant presentation and feedback on the instruction in order to be included for qualification. If the instructor candidate has not completed an IFMA-provided Train-the-Trainer course, the curriculum of the Train-the-Trainer course shall contain the following, as a minimum:

- The Instructors role in learning
- The learning process
- Influences on learning
- Identifying course content
- Specifying behavior types
- Instructional planning
- Written instruction materials
- Oral presentation methods
- Questioning strategies
- Discussion and group participation methods
- Effective demonstration methods
- Use of instructional media
- Use of instructional devices
- Ways of measuring and evaluating student achievement
- Effective learning environments
- Class supervision

Online Requirement for all Instructor Candidates:

To ensure integrity and consistency of content, each instructor candidate will be required to purchase IFMA's instructor kit, successfully complete the student self-study courses & final assessments they will be teaching and participate in instructor meetings.

Completion of a supervised modular teaching session from a course:

For each IFMA course offered, each instructor candidate may become qualified by teaching at least one module from the course. Arrangements to teach via satellite can be coordinated; however, instructors will be required to cover the fees for this option.

III. INSTRUCTOR QUALIFYING PROCESS

- A. The instructor qualification by IFMA is a formal process. Section I, Qualified Instructor Process, outlines the application process for Instructor candidates. IFMA shall select instructors based on the following criteria:
- i. Formal training in instructional methods
 - ii. Instructor capabilities and experience
 - iii. Demonstrated content competency and expertise
 - iv. Knowledge of facility management
 - v. Ability to successfully complete self-study materials for new credentials or

workshops such as the FMP, SFP, Essentials of Facility Management Workshops and so forth.

- B. Once the instructor candidate has submitted the required documentation to the Professional Development/Education Department of IFMA, the material will be reviewed, and a recommendation will be made accordingly. The recommendation may include some or all of the following:
- i. Approval of the candidate, as submitted.
 - ii. A face-to-face or telephone interview with the candidate.
 - iii. Submission of additional supporting documentation.
 - iv. Requirements for IFMA to audit an existing candidate's course.
 - v. Requirement for the candidate to audit, or co-teach, an IFMA course.
 - vi. Demonstrate knowledge of IFMA instructional materials.
 - vii. Non-approval of the candidate, as submitted, with recommendations how to remedy whatever issues remain.

IFMA's Director of Professional Development has the final authority to approve or deny qualified instructor status. There is no guarantee those who submit instructor applications will be qualified, nor can IFMA guarantee that future changes could not potentially alter the overall instructor program after an instructor is qualified. These changes could include, but not be limited to, outsourcing the on-going instructor qualified and training process, expanding the training requirements to maintain qualified instructor status or reducing/eliminating the number of instructors needed.

Once an instructor is qualified or pending with conditions, and prior to teaching a course, instructors must become familiar with the FMP, SFP, Facility Management Learning System, Essentials of Facility Management and/or CFM Workshop materials by completing the self-study program and successfully passing the final assessments for each module. In addition, all instructors are required to attend an FMP, SFP, Facility Management Learning System and/or CFM Workshop-specific preparation class created in order to review the instructor-led materials, PowerPoint's, and the instructor portal. IFMA may offer this training in an on-line or hybrid format.

Instructors will be sent the student self-study credential program upon receipt of a completed instructor agreement and payment. After the instructor successfully completes the self-study courses and passes all the final assessments and/or any conditions noted in their qualifying letter, IFMA will release the instructor slides, facilitator guide and instructor portal password. IFMA reserves the right to remove an instructor's access to the on-line portal, terminate their qualified status and remove them from the qualified instructor list on IFMA's website if the terms of the agreement or handbook are violated.

- C. All costs associated with becoming and maintaining IFMA qualified instructor status are at the expense of the instructor (or the entity for whom they work). All attempts are made to keep these expenses reasonable, but expenses will occur. Some expenses that will be associated with becoming a qualified instructor include, but are not limited to:
- Instructor materials for new or updated courses (US \$595 FMP, US \$595 SFP, US \$595 Facility Management Learning System, US \$150 Essentials of Facility Management Workshops, no charge for CFM Workshop for new courses. Cost of the

- revised materials has not yet been finalized)
- Conditions set forth during the qualifying period such as: co-teaching, taking a train-the-trainer course, additional product review.
- Mandatory meetings/training as identified by IFMA to meet and maintain accreditation standards.

IV. INSTRUCTOR MAINTENANCE

Part of being an IFMA qualified instructor requires continuing education so that instructors remain current on both educational methods and techniques as well as course content.

IFMA's qualified instructors are not employees of IFMA and therefore are responsible for handling their own contracts with potential clients.

Ongoing Educational Requirements:

- A. Instructors will be required to maintain instructor qualifications consisting of continuing education in instructional methods and ongoing classroom instruction hours. Instructors will be required to sign yearly agreements with IFMA via an on-line renewal process. Credentials will be reviewed on a 3-year basis. Ongoing instructor requirements will consist of the following:
 - i. Documented course instruction of at least 40 hours over the 3-year period.
 - ii. Continuing professional development hours in course instruction of at least 16 hours over the 3-year period.
- B. Instructors shall attend the training session for the new instructor portal and shall use this portal to the fullest extent possible.
- C. IFMA qualified instructors may only teach for those entities licensed to use IFMA materials. These licensed entities will purchase the appropriate materials from IFMA. If a qualified instructor owns a consulting company and wants to offer courses in a public venue, they are required to apply for a Training Affiliate license agreement. Please contact credentials@ifma.org for complete information.
- D. Some of IFMA's licensed affiliates may be granted options via their license agreement to offer education via a virtual platform based upon their capacity as demonstrated to IFMA. Qualified instructors cannot offer this option on their own unless their company is licensed by IFMA as a training affiliate and written permission is granted.
- E. IFMA does not guarantee, promise or imply a qualified instructor will be contracted by a licensed affiliate (including: chapters, councils, corporations, training affiliates, IFMA Headquarters, colleges or universities) to teach an IFMA course. The licensed affiliate has the right to contract out with the qualified instructor of his/her choice.
- F. Instructors agree not to violate IFMA's Intellectual Property and Nondisclosure Agreement and Proprietary Interest Agreement. Unless with the prior approval of IFMA, evidenced by some writing, instructors may not in any way modify the course content(s), course materials or instructor materials by, for example: changing a course name, adding any material to, deleting from, or updating, the materials purchased/provided from IFMA as texts for the courses offered or supplementing the materials.

- G. Instructors shall not aggressively 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.
- H. Instructors shall wear appropriate attire (business/business casual) while teaching for a licensed affiliate.
- I. Inappropriate Comments/Materials: Instructors warrant and represent that, as a representative of the FM profession, 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.
- J. Course Evaluation: All instructors and courses will be evaluated according to the Course Evaluation form provided on-line.
- I. Instructor Evaluation: IFMA reserves the right to observe instructors in the classroom, monitor instructor ratings, and/or remove an instructor's qualified status. Conditions may be required and could consist of developing a plan to remediate specific concerns and a time frame in which to make the stipulated changes. Concerns about course evaluations should be directed to the Director of Professional Development.
- J. Instructors shall attend additional training or meetings as necessary. Mandatory requirements will be at the cost of the qualified instructor. IFMA will make reasonable efforts to control expenses.

Some reasons for additional training or meetings may include:

- ◆ 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 CONDUCT

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

Code of Conduct

1. I shall have as my primary goal developing and managing safe, humane, and functional work spaces.
2. I shall integrate the needs of management with the needs of people in the workplace to develop and manage humane and effective work environments.
3. I shall have as an achievable goal maintaining objective, professional judgments. I shall not compromise this judgment by undertaking any activity, accepting any contribution or having any conflict of interest that would prevent acting in the best interest of my employer, clients, or those people for whom I provide or maintain workplaces.
4. I shall practice in a manner that supports the rights of employers, employees and clients, and shall not discriminate because of race, sex, creed, age or national origin.
5. I shall continually seek new information to maintain and upgrade my professional skills relative to the design, construction, maintenance and management of the physical environment as it relates to people and work processes.

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

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 unless they are an IFMA qualified instructor. 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

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. 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 (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 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

DELIVERY OF IFMA INSTRUCTIONAL MATERIAL

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 using a given teaching method, instructors should modify or improve the method of content delivery so that learning objectives are achieved and students succeed.

INSTRUCTIONAL MANUAL

All qualified instructors will be provided with all necessary materials well in advance to use during their classes. All of the manuals are comprehensive and written in a narrative textbook style. Each manual 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 students' attention through an analogy or personal experience that is 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 section covers 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 students' 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.

Assessments

The assessment is part of the learning event and should be administered toward the end of the event. The assessment under the enhanced FMP and SFP will be administered on-line. The assessment for the Essentials workshop is in the classroom or online depending on the delivery option selected.

Instructors must communicate with participants the specific passing standards IFMA has established.

The pass rate can be found in the respective instructor materials.

Evaluation/Feedback

The purpose of this evaluation is to determine students' opinions regarding the **accomplishment of the learning objectives**. Secondary purposes are to assess the training system and instructor effectiveness.

AUDIOVISUAL EQUIPMENT

Instructors are responsible for coordinating their AV requirements with those they contract out to for services. 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.

***** 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.***

CRITERIA FOR OBTAINING IACET CEU CREDITS

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 Credential's 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
- Completion of both formative and summative assessments
- Completion of course evaluation

IFMA Professional Development/Education Department will record CEUs awarded to attendees and will retain this information for seven years. Upon written request, IFMA will furnish a transcript showing education completed and CEUs earned.