



IBBA Affiliate Education Policy Manual

2018

International Business Brokers Association

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Introduction

The International Business Brokers Association (IBBA) is the world's largest organization supporting the education and professional development of the business broker. With everything that the IBBA does and provides, education remains at the heart of our mission and purpose.

This brief manual is intended to aid our Affiliates in understanding the IBBA's educational policies, and in helping us maintain high standards of excellence in our educational delivery. Our Affiliates are an important part of fulfilling our mission to provide the best education to business brokers everywhere.

Partnering to bring world-class education to business brokers everywhere.

The term 'Affiliate' means any third-party organization who partners with the IBBA to deliver IBBA education locally. It is preferred that courses be given through non-profit local, state or regional business broker associations. However, consideration shall also be given to for-profit organizations such as franchises or large business brokerage entities.

Please review this manual in its entirety before submitting a request to offer IBBA education at your next event. Questions and request submissions should be directed to education@ibba.org.

Submitting an Initial Request

At least 50 days prior to the date of the event, the Affiliate must email education@ibba.org, indicating the date(s) and course(s) it intends to provide. IBBA Headquarters will then provide the list of approved instructors for the stated course(s).

Affiliate is responsible for contacting the approved instructors to determine availability and fees. The IBBA does not dictate the fees charged by instructors for Affiliate education and is not a party to any arrangements made between Affiliate and the chosen instructor.

Affiliate may not schedule any instructor who is not approved by the IBBA to teach the course. Use of a non-approved instructor will prohibit the students from receiving IBBA educational credit, even though fees have been paid to the IBBA.

An instructor should be secured no later than 30 days in advance of the intended event date. Once the instructor and event date(s) are confirmed, an Affiliate Field Course Agreement (“Agreement”) will be sent to the Affiliate’s authorized representative for execution (see Exhibit A). The event should not be promoted until the Agreement has been fully executed.

Achieving Approval for Non-Approved Instructor

If Affiliate believes that an individual is qualified to be an approved instructor for a course but is not currently on the approved instructor list, the individual should refer to the IBBA’s Instructor Policy Manual for details and instructions on how to achieve approved instructor status for a course.

Affiliate Course Pricing and Fees

Unless otherwise stated in writing, the pricing and fees in the then-current form of the Agreement apply. See Exhibit A for the current Agreement.

Affiliate Event Promotion

Affiliate has sole responsibility for promoting its educational event. The IBBA may support Affiliate’s efforts by performing activities such as:

- Sending email blasts to its database of members and nonmembers.
- Posting information on IBBA social media accounts.
- Listing the event on the IBBA’s calendar on IBBA.org.
- Asking other Affiliate groups to send out information about the event.

Affiliate Event Fees

The Affiliate will be completely responsible for all expenses involved in producing the event, which normally will include the instructor expenses, facility charges, meal costs, and all promotional costs incurred. IBBA will not be responsible for any expenses or payments related to the Affiliate event. Notwithstanding the above, the IBBA will not charge the Affiliate for the IBBA's support efforts as specifically listed in the "Affiliate Event Promotion" section, herein.

Retake Pricing

If an individual wants to re-take an IBBA course being offered at an Affiliate event, the individual may retake that course at any venue where that course is available, given availability of space. The sponsor of the event, whether it be another Affiliate, or the IBBA itself, is entitled to charge a reasonable fee to cover the cost of food/beverage, materials, etc., but not to exceed 50% of the standard course price. The IBBA will not charge these individuals any additional course fees.

Course Materials

Affiliate is responsible for the cost of materials associated with its chosen course(s). IBBA staff will submit the print order to a local printing facility (such as FedEx/Kinkos); this ensures the materials are printed correctly and according to standards. Course materials typically include the participant guide, handouts and evaluation forms, and all materials are printed in black and white. Items such as name tent cards, if desired, are the Affiliate's responsibility to create and print.

Affiliate must submit the number of enrolled students to the IBBA at education@ibba.org no later than 7 days ahead of the event date, to ensure adequate time for printing and delivery of course materials. We typically recommend ordering two extra copies of the course materials. IBBA cannot guarantee that the course materials will be ready in time if the enrollment number is received late.

Post Affiliate Event Requirements

Within 7 business days following the event, the Affiliate must send the final attendee roster to education@ibba.org. The roster must include the person's name, email address and membership status (i.e. IBBA Member, Affiliate Member, Non-Member). IBBA Headquarters will then send an invoice to the Affiliate for the applicable fees.

The invoice must be paid in full and the exam results submitted by the course instructor for students to be awarded the applicable continuing education credits.

Summary of Primary Activities and Timeframes

Activity	Timeframe
Submit initial request	At least 60 days prior
Secure Instructor	At least 45 days prior
Submit enrollment number	At least 7 days prior
Submit final attendee roster	Within 7 business days
IBBA will invoice affiliate	Within 5 days of receiving final roster
Affiliate will send IBBA payment	Within 7 days of receiving invoice
Applicable education credits awarded (if instructor submitted exam results)	Within 5 days of receiving payment

EXHIBIT A: SAMPLE AFFILIATE FIELD COURSE AGREEMENT



DATE

IBBA Affiliate Field Course Agreement

The IBBA has authorized the AFFILIATE NAME ("Affiliate") to instruct the following courses, from DATE:

1. Course #00: Advanced Recasting (00 credit hours).

The approved instructor for COURSE is INSTRUCTOR.

Please review the details below, and sign and return this document. Approval is not final until this Agreement is cross executed by the IBBA.

1. Affiliate will adhere to the course pricing as outlined in the table below:

Course Hours	IBBA Member Per Person Price	Affiliate Member Per Person Price	Non Member Per Person Price
4 hour	\$175	\$200	\$275
8 hours	\$325	\$375	\$450
16 hours	\$750	\$799	\$875

2. The Affiliate agrees to pay the IBBA a per person fee as outlined in the table below:

Course Hours	IBBA Member Per Person Fee	Affiliate Member Per Person Fee	Non Member Per Person Fee
4 hour	\$50	\$75	\$125
8 hours	\$100	\$130	\$200
16 hours	\$225	\$275	\$385

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Example of Fees Paid to IBBA				
Course (hours)	# of Member Students	# of Affiliate Member Students	# of Non Member Students	Amount owed to IBBA
#220 (8)	3	5	3	\$300+\$650+\$600=\$1,550
#107 (4)	3	5	3	\$150+\$375+\$375=\$900
EXAMPLE TOTAL DUE TO IBBA:				\$2,450

The above table is for illustrative purposes only. The actual amount due to the IBBA will depend upon how many member/non-member students attend each course.

3. The final registration count must be submitted to the IBBA no later than 7 days in advance of the course start date.
4. The IBBA will submit the course material order to a print facility selected by the Affiliate. Course materials typically include the participant guide and any necessary handouts. All materials are printed in black and white. Affiliate is responsible for picking up the materials and for the materials print cost.
5. Items such as name tents and evaluation forms are to be printed by the Affiliate if desired.
6. Affiliate will be completely responsible for all expenses involved in producing the event, which normally will include the instructor expenses, facility charges, any meal costs, and all promotional costs incurred. IBBA will not be responsible for any payment related to the Affiliate event.
7. Affiliate is responsible for ensuring the instructor grades the exams and submits them to the IBBA.
8. Within seven (7) days after the completion of the course, Affiliate will email the final roster of attendees to IBBA Headquarters. The roster must indicate membership status.
9. IBBA will invoice Affiliate within 5 business days of receiving the final roster of all attendees.
10. Affiliate will send invoice payment to the IBBA within 7 business days of receiving the invoice.
11. Members will not receive course credit until the graded exams and invoice payment are received.
12. If an individual wants to re-take an IBBA course being offered at an Affiliate event within 1 year, the Affiliate is entitled to charge a reasonable fee to cover the cost of food/beverage, materials, etc., but not to exceed 50% of the standard course price. The IBBA will not charge any fees for these retake individuals.

By signing below, you affirm that these terms and conditions have been read and understood, and that you have the authority to sign this Agreement on behalf of the Affiliate.

Affiliate

IBBA

Print Name

Kylene Golubski, Executive Director, IBBA

Signature

Signature

Date: _____

Date: _____

The International Business Brokers Association
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