



# IBBA Instructor Policy Manual

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2022

**International Business Brokers Association**

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## Introduction

IBBA instructors are prominent leaders within the Business Intermediary profession. With a blend of practical expertise and training acumen, instructors are a primary means by which the IBBA executes its Mission to educate and elevate our industry. Instructors for IBBA courses are selected and approved by the IBBA Management Staff using policies and requirements developed in collaboration with the IBBA Education Committee. We seek instructors with both real world experience, and a proven track record of being an excellent instructor/presenter.



Adherence to these policies ensures a high level of consistency and professionalism in the IBBA's course delivery, while providing an enlightening and enjoyable experience for our students.

## Requirements to Become an Approved Instructor:

- Being an IBBA or M&A Source member in good standing.
- Minimum 5 years' experience in the industry or related field.
- Being a Certified Business Intermediary or Merger & Acquisition Master Intermediary.
- One of the following:
  - Presented an IBBA workshop with an average evaluation score of 4 or higher (on a scale of 0-5).
  - Assisted in presenting an IBBA course with an average evaluation score of 4 or higher from the Approved Instructor.
- Subject Matter Expert in the development of an IBBA course or workshop.
  - Candidates who are not the course Subject Matter Expert ("SME") must have first audited the course prior to teaching it.
    - To audit a course means the candidate attends the entire class, assists the Approved Instructor and possibly teaches part of the course as directed by the Approved Instructor.
    - When auditing a course, assigned instructor candidates will sit at the instructor table and will assist the Approved Instructor presenting the course, as directed by the Approved Instructor.
- Attainment of advanced professional education/accreditation.

All the above is required but can be waived at the discretion of the Education Chairman or IBBA Management.

Although not mandatory, it is recommended that all candidates successfully complete a presentations skills course. All new instructors will be closely monitored and evaluated through the reviews of the course participants for at least two classes taught before reaching the Approved Instructor status.

In addition to the esteem and prestige associated with serving as an IBBA instructor, Approved Instructors will be eligible for compensation and/or benefits from the IBBA, as well as from IBBA Affiliates for whom Approved Instructors may provide instructor services.

If you meet the requirements and are interested in becoming an IBBA Approved Instructor, please submit the application on the following page to [education@ibba.org](mailto:education@ibba.org).

### Types of Instructor Status:

- Instructor Candidate
  - An Instructor Candidate is working towards becoming an Approved Instructor.
- Approved Instructor
  - An Approved Instructor has met all requirements to be an Instructor for the IBBA.
- Suspended
  - A Suspended Instructor is when an Approved Instructor is being reviewed by the Education Committee due to, but not limited to, low evaluation scores or misconduct.
- Cancelled
  - A Cancelled Instructor is any instructor that had their Approved Instructor status revoked due to, but not limited to, low evaluation scores or misconduct.



## Approved Instructor Application

### PERSONAL INFORMATION:

FIRST: \_\_\_\_\_ MI: \_\_\_\_\_ LAST: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

CITY: \_\_\_\_\_ STATE/PROVINCE: \_\_\_\_\_ ZIP/MAIL CODE: \_\_\_\_\_ COUNTRY: \_\_\_\_\_

PHONE: \_\_\_\_\_ FAX: \_\_\_\_\_

EMAIL: \_\_\_\_\_

Course(s) you are applying to be an instructor for: \_\_\_\_\_

### Requirement verification:

- I am an IBBA or M&A Source member.
- I have a minimum of 5 years' experience in the industry or related work. Please describe related experience:  
\_\_\_\_\_

- I am a Certified Business Intermediary or Merger & Acquisition Master Intermediary.
- I am a Subject Matter Expert in the development of an IBBA Course or Workshop.
  - I am not an SME, but I have audited the course I am applying to be an Approved Instructor for.
- I have done one of the following:
  - Presented an IBBA workshop earning an average evaluation score of 4 or higher.
  - I've assisted in presenting an IBBA course with an average evaluation score of 4 or higher from the instructor.

I have attained advanced professional education/accreditation from \_\_\_\_\_.

**I do not meet all the above requirements. I have included a resume for consideration of a waiver.**

### Acknowledgement:

I have read and understood the Code of Ethics and agree to abide by the Standards of Ethical Conduct found at [www.ibba.org](http://www.ibba.org).

I declare and affirm the statements made in the foregoing application, including accompanying statements are true, complete and correct. I authorize the investigation of all statements contained in this application.

I have read and understand the policies outlined in the Instructor Policy Manual.

PRINT NAME: \_\_\_\_\_

SIGNATURE OF APPLICANT: \_\_\_\_\_ DATE: \_\_\_\_\_

## Instructor Code of Conduct and Dress

When teaching an IBBA course, Instructors are ambassadors for the IBBA. We want to provide a professional, safe and comfortable learning environment for all students. By agreeing to teach an IBBA course, Approved Instructors agree to the following:

- Non-Discrimination:
  - Instructors do not and shall not discriminate based on race, color, religion (creed), gender, gender expression, age, national origin (ancestry), disability, marital status, sexual orientation, or military status, in any of its activities or operations.
- Non-Harassment:
  - The IBBA has adopted a zero-tolerance policy toward discrimination and all forms of unlawful harassment, including but not limited to sexual harassment. This zero-tolerance policy means that no form of unlawful discriminatory or harassing conduct by or towards any person during courses will be tolerated. The IBBA is committed to enforcing its policy at all levels within the Association. Any instructor who engages in prohibited discrimination or harassment will be subject to discipline, including immediate discharge from Approved Instructor status.
- Neutrality:
  - Instructors must not support or help either side in a conflict, disagreement, etc. During a dispute, instructors must remain neutral.
- Non-Solicitation:
  - Instructors shall not solicit students for the instructors' own benefit.
- Diversity:
  - Instructors must strive for diversity in examples that represents all people groups equally. Be committed to inclusion and to respecting and accommodating diversity including those differences arising from civil status, sexual orientation, religion, gender, age, disability, race and ethnicity.

Allegations of discrimination, harassment or solicitation may result in immediate revocation of Approved Instructor Status.

IBBA Instructors are a representation of the IBBA. Consistent with this role, all IBBA Instructors shall dress professionally and appropriately. Male Instructors are required to wear a jacket and tie while teaching an IBBA Course. Female instructors are required to wear dress pants or skirt and a blouse while teaching an IBBA Course.

In the event an Approved Instructor needs to cancel their assignment, they must notify IBBA Headquarters at least 30 days before the event. Failure to do so may affect the Approved Instructor status.

## Course License Agreement

By agreeing to teach an IBBA course, Instructors acknowledge that course materials remain the sole and exclusive property of the IBBA. Instructors agree that any course materials will not be recirculated or made available to any other person or entity.

## Editing/Updating Course Materials

Course materials will be sent as soon as the Approved Instructor enters into an agreement to teach a course. It is the responsibility of the Approved Instructor to review all materials and make any necessary changes. To make changes, the Approved Instructor must provide the Tracked Changes in Microsoft Word, Excel or PowerPoint documents. If the change is not clear, it will not be implemented. All changes must be sent to the Education Manager at [education@ibba.org](mailto:education@ibba.org) 30 days prior to the event. This will allow enough time for the Education Manager to implement the changes. The changes will first be sent to the Lead SME ("LSME") for approval. Once approved, changes will be documented and implemented by the Education Manager.

## Documentation

### Grading

The Instructor is responsible for all grading without bias and accurate recording. The instructor is responsible to notify any students if a failing grade was given. Once all grades are submitted to IBBA headquarters, the instructor must destroy all course materials, including but not limited to the exams.

### Evaluations

All evaluation forms must be completed by all students and sent by the Approved Instructor to IBBA headquarters no later than 7 days after the course.

If an Approved Instructor receives an average score of 3 or below in any category on the Evaluation Form, the instructor will be contacted to discuss the feedback. Two consecutive evaluation forms with ratings at or below 3 will result in a review of the individual's Approved Instructor Status by the Education Committee.

## Compensation

### IBBA Education Events

Expense reports are due to IBBA headquarters no later than 30 days following the event.

Otherwise, IBBA will not be required to reimburse expenses. The expense report template will be sent to instructors prior to the event.

Instructors are responsible for making their own travel reservations. The table below outlines instructor fees and allowable expense limits.

Course Hours	Instructor Fee
4-Hours	\$500.00
8-Hours	\$700.00
<b>Item</b>	<b>Allowable Amount</b>
Hotel	4hr-1 night, 8hr-2 nights
Airfare	Up to \$500.00
Ground Transportation	Up to \$40.00
Meals	Up to \$50.00 per day

The following needs to be included in all expense reports:

1. ITEMIZED receipts (no credit card signature slips will be accepted without the back-up itemized receipt, itemized receipts PLUS the signed copy to show tip) to ensure proper reimbursement.
2. Tape or staple receipts in an organized manner to an 8 ½ x 11 sheet of paper. Use multiple sheets if necessary.
3. Write on the front of each receipt what it is for (e.g., dinner for myself 5/6, airfare, etc.)
4. The IBBA does not reimburse costs for colleagues or spouses, so all guest expenses should be left off the form.
5. Submitted reimbursement form and receipts must be postmarked no later than 30 days after the even. Items postmarked after that date will not be reimbursed.
6. For fastest reimbursement, scan documents and email to [education@ibba.org](mailto:education@ibba.org).

### Affiliate Education Events

Affiliates are responsible for contacting Approved Instructors to determine availability and fees. The IBBA does not dictate fees between Approved Instructors and the Affiliate for Affiliate education and is not a party to any arrangements made between Affiliate and the chosen Approved Instructor. The IBBA will provide Affiliates with a list of Approved Instructors. Note that in order to teach IBBA Courses to an Affiliate, or any third-party organization, the Affiliate or organization must first enter into an Agreement with the IBBA to use the IBBA Course Materials. (A separate Affiliate Education Policy applies to such situations.)