



# Center for Career Advancement

*Education for Your Competitive Edge*

## **SIOR CCA INSTRUCTOR HANDBOOK** **Policies and Procedures**

Updated October 20, 2009

*The SIOR Education Council and Faculty Committee leadership retain the rights to revise or modify these policies and guidelines, select the educational program and appropriate instructors for each program, and reassign or cancel any teaching assignment at any time.*

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## **FACULTY COMMITTEE: ROLES AND RESPONSIBILITIES**



The Faculty Committee is a committee under the SIOR Education Council. The purpose of the Faculty Committee is to provide SIOR with instructors that are skilled communicators, industry experts, and represent SIOR well to client groups and prospective members. Faculty members instruct SIOR designation courses, non-designation courses, seminars, and occasionally instruct at SIOR conventions. The faculty has two subcommittees that focus on the following:

### **Instructor Recruitment Subcommittee**

This subcommittee establishes the criteria for becoming an SIOR instructor and remaining an instructor and actively recruits instructors from both inside and outside SIOR.

### **Training and Development Subcommittee**

The Training and Development Subcommittee develops programs that cross train instructors on SIOR course and seminar topics. In addition this subcommittee arranges educational programs that provide value to faculty members on a wide array of “train-the-trainer” topics.

### **Job Descriptions – Faculty Leadership**

**Faculty Chairperson** is responsible for the following:

- Ensures execution of committee goals
- Works with staff to manage the instructor evaluation process
- Works with staff and the Education Council on course administration (site selection, topic selection, etc.)
- Works with faculty and staff to identify existing topics that are in need of an update and to notify the Education Council accordingly.
- Consults with Education Council on course updates and new topic development

\*The Faculty Chairperson is a voting member of the Education Council

**Faculty Vice Chairperson - Recruitment** is responsible for the following:

- Establishes criteria for becoming an SIOR instructor and remaining an instructor.
- Recruits both SIOR and non-SIOR candidates for the SIOR Faculty.
- Assists candidate faculty through the selection process.

\*The Faculty Vice Chairperson - Recruitment is a non-voting member of the Education Council

**Faculty Vice Chairperson - Training** is responsible for the following:

- Creates and executes instructor training programs that cross train SIOR faculty members on a variety of SIOR course topics
- Arranges value added educational opportunities for faculty at SIOR national meetings (one per year) that focus on “train-the-trainer” topics
- Works with staff and Faculty Chairperson on developing budgets for the above referenced events.

\*The Faculty Vice Chairperson - Training is a non-voting member of the Education Council.

## BECOMING AN INSTRUCTOR: APPLICANT CRITERIA



1. It is suggested that a prospective instructor hold an SIOR designation; other NAR affiliate designation; or be considered an “expert” on a particular real estate topic. The candidate, if an SIOR or other NAR-affiliate designee, should be a member of its organization in good standing. The prospective instructor is not to have any ethics complaints successfully adjudicated against him/her or any disciplinary action by the prospective instructor’s state real estate commission
2. The prospective instructor should be an active commercial real estate practitioner or be involved with commercial real estate in some professional support vendor capacity (i.e. technology, lawyer, accountant, construction, college instructor, architect, etc.). Exceptions may be made for professionals who have retired from commercial real estate, but still wish to teach.
3. The prospective instructor must have strong podium and in-class skills, as well as overall clarity of presentation. Experience in instructing or lecturing whether at a college, a professional program or as a panel member or speaker at a symposium, seminar, lecture, convention, etc. is highly desirable.
4. The prospective instructor must have successfully completed an SIOR sponsored instructor-training course or any other NAR (or equivalent) instructor sponsored training program i.e. ITI, CCIM, etc. If the prospective instructor has sufficient experience as a college or professional speaker or has frequent experience presenting at professional venues (conventions, conferences, etc.), then the SIOR Faculty Committee may waive this step.
5. It is suggested, but not required, that a prospective instructor have attended SIOR education-related committee meetings.
6. The prospective instructor must be proficient in the use of technological presentation tools such as PowerPoint and/or Excel (in the event that the coursework that is to be taught requires either software and to manage any on-line instructing). If training is required for a new technology (for example, an online course) SIOR will provide that training.
7. The prospective instructor should be prepared to commit to at least 3 years of possible instructing. There is no guarantee on the frequency of teaching opportunities or the teaching format.

## **BECOMING AN SIOR INSTRUCTOR: STEPS**

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Prospective instructors can choose one of two pathways to become an SIOR instructor, as detailed below:

### **PATH 1:**

1. Upon submission of a completed application to SIOR headquarters, a conference call will be scheduled with either the Faculty Vice Chairperson – Recruitment or the Director of Education to familiarize the applicant with the process of becoming an instructor.
2. The prospective instructor shall present a topic idea at a SIOR World Conference at an educational breakout or Specialty Practice Board (SPB) session. A current SIOR instructor(s) and the SIOR Director of Education will audit and evaluate the prospective instructor and material for a) content knowledge; b) presentation skills; and c) delivery system. A minimum score of 4.5 out of a possible 5.0 will be required.
3. The prospective instructor shall audit, at his/her own travel expense, a SIOR designation course or co-sponsorship program led by a current SIOR instructor.
4. The prospective instructor shall then be required to “team teach” with a SIOR instructor up to two times on a topic chosen by the SIOR Faculty Committee. The student evaluations must be a 4.5 out of a possible 5.0 along with satisfactory evaluations from the instructor and the SIOR Director of Education. Evaluations will be based on content, instruction, and presentation skills.
5. The prospective instructor will be offered the opportunity to solo teach a session for a designation course of his/her specialty. A current SIOR instructor will monitor and evaluate the prospective instructor's performance. The student evaluations must be a 4.5 out of a possible 5.0 along with satisfactory evaluations from the instructor and the SIOR Director of Education. Evaluation will be based on content, instruction and presentation skills.
6. If the above steps have been achieved, the SIOR Faculty Committee shall review the information and feedback from the instructor, students and staff and will then recommend approval to the Education Council.
7. If the above steps have not been achieved, the SIOR Faculty Committee shall review the information and feedback from the instructors, students and staff and will provide verbal and written communication advising the potential instructor of their deficiencies and offering alternatives to teaching designation courses (see Alternatives to Teaching Designation Courses below).

### **PATH 2:**

1. Upon submission of a completed application to SIOR headquarters, a conference call will be scheduled with either the Faculty Vice Chairperson – Recruitment or the Director of Education to familiarize the applicant with the process of becoming an instructor.
2. The prospective instructor will be scheduled for an audition before an SIOR instructor panel. Auditions are usually held at the SIOR Fall World Conference. However, if there is demand, the Faculty Committee may opt to hold auditions at either the Spring or Fall World Conference. The audition will last 20 minutes and consist of a 10-minute PowerPoint presentation using current SIOR designation course materials and a 10 minute question and answer period. The instructor will be evaluated by the panel and must receive a minimum average of 4.5 out of a possible score of 5.0.

3. If the above steps have not been achieved, the SIOR Faculty Committee shall review the information and feedback from the instructors, students and staff and will provide verbal and written communication advising the potential instructor of their deficiencies and offering alternatives to teaching designation courses (see Alternatives to Teaching Designation Courses below).
4. If the prospective instructor has successfully completed the audition process, the prospective instructor shall audit, at his/her own travel expense, a SIOR designation course or co-sponsorship program led by a SIOR instructor. In some cases, a prospective instructor may audit a course prior to auditioning. In these instances, this should be scheduled through the SIOR Director of Education.
5. The instructor will be required to “team teach” with a SIOR instructor up to two times on a topic chosen by the SIOR Faculty Committee. The student evaluations must average at least 4.5 out of a possible 5.0 along with satisfactory evaluations from the instructor and the SIOR Director of Education. Evaluations are based on content, instructor knowledge and instruction and presentation skills.
6. If the above steps have been achieved, the SIOR Faculty Committee shall review the information and feedback from the senior instructor, students and staff and will then recommend approval or disapproval to the Education Council.

#### **FINAL APPROVAL:**

After successfully completing one of the above pathways, the prospective instructor will be approved as an SIOR instructor for any SIOR affiliated program at the request of SIOR. A letter of confirmation as an SIOR certified instructor will be issued to the instructor by SIOR staff.

#### **ALTERNATIVES TO TEACHING DESIGNATION COURSES:**

1. If a prospective instructor does not successfully pass any part of the audition or team teaching pathways, they will be notified by the Faculty Committee Vice Chair of Recruitment as such and provided with constructive feedback and the following options:
  - a. Encouragement to continue presenting at the conference breakout session and SPB levels to fine tune presentation and podium skills.
  - b. Attend an instructor training course (recommended by the Vice Chair of Training) at the prospective instructors personal cost.
2. If the prospective instructor elects to present at the conference level, the presentation will be evaluated by an SIOR instructor and the SIOR Director of Education (see Path 1, number 2).
3. If the prospective instructor attends an instructor training course, they may re-audition at the next audition opportunity (see Path 2, number 2).
4. In cases where the prospective instructor would like speaking and teaching opportunities outside of SIOR designation and affiliated courses, they will be referred to the following:
  - a. Breakout Subcommittee of the Conference Education Committee to submit a session proposal and potentially present at the conference level.
  - b. Specialty Practice Board Committee for consideration as a panelists or presenter for a future SPB educational session.

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## **BECOMING AN SIOR INSTRUCTOR: APPLICATION**

Please complete the application and submit your completed application to Lizzy Koenst, Director of Education, SIOR, 1250 New York Ave., NW, Ste. 350, Washington, DC 20005 or fax to 202.216.9325 or e-mail to [lkoenst@sior.com](mailto:lkoenst@sior.com).

### **Applicant Information**

Name:				Company:		
Street:				Suite:		
City:			State:		Zip code:	
Phone:		Mobile:			Fax:	
Email:						

### **Real Estate Employment**

List employment for the last four years, beginning with the most recent.

	<b>Company</b>	<b>Business</b>	<b>Dates</b>	<b>City</b>	<b>Contact Person &amp; Phone</b>
1.					
2.					
3.					
4.					

### **Educational Background**

<b>Undergraduate College:</b>		<b>Graduate College:</b>	
Degree:		Degree:	
Major:		Major:	
Date of Graduation:		Date of Graduation:	
City, State:		City, State:	

**Teaching Experience**

List all teaching experience that you have had in chapters, seminars, colleges, local boards, other organizations, universities, conventions, etc.

	<b>Sponsoring Organization</b>	<b>Topic</b>	<b>Class Size</b>	<b>Date(s)</b>	<b>Contact Name, Phone &amp; Email</b>
1.					
2.					
3.					
4.					
5.					
6.					

**Training Experience**

Please list any instructor training courses that you have completed (SIOR, NAR, ITI, CCIM, etc.)

	<b>Sponsoring Organization</b>	<b>Topic</b>	<b>Date(s)</b>	<b>Contact Name, Phone &amp; Email</b>
1.				
2.				
3.				

**Please attach the following documentation to your application:**

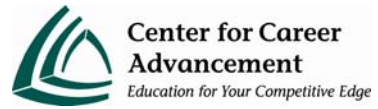
1. A letter of good standing by your SIOR chapter president, local state overlay board, or state licensing board.
2. A sample of any writings you have authored on topics of interest to the commercial real estate industry.
3. An up-to-date resume.

**Please submit your completed application to:**

Lizzy Koenst  
 Director of Education  
 SIOR  
 1201 New York Ave., NW, Ste. 350  
 Washington, DC 20005  
 Tel: 202.449.8222  
 Fax: 202.216.9325  
 Email: [lkoenst@sior.com](mailto:lkoenst@sior.com)



**BECOMING AN SIOR INSTRUCTOR:  
INSTRUCTOR AUDITION EVALUATION FORM**



Applicant Name:  
Applicant Topic:  
Audition Date & Time:  
Evaluator Name:

1. Using a scale of 1 to 5 (5 being the highest), rate the instructor applicant on the following:

	Rating (1-5)	Comments
<b>PRESENTATION SKILLS</b>		
Appearance		
Spoke clearly and confidently		
Mannerisms		
Eye contact		
<b>CLASS RAPPOR T &amp; MOTIVATION</b>		
Encouraged and answered questions		
Use of anecdotes/stories		
Showed enthusiasm for the subject		
Was interesting and entertaining		
Exhibited a sense of humor		
<b>COMPETENCE, KNOWLEDGE &amp; ORGANIZATION</b>		
Sense of Direction/Organization and Flow of Material		
Knowledgeable about Subject Material		
Prepared for Class		
Effective Use of PowerPoint		
Effective Use of Time		

2. Were the essentials of a good presentation sufficiently demonstrated by the instructor applicant? \_\_\_\_\_ Yes      No\_\_\_\_\_

3. If no, please describe any gaps:

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4. What did you like best about this presentation/applicant?

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5. What can the applicant do to improve this presentation?

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6. Any additional comments about the instructor applicant or presentation?

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## INSTRUCTOR POLICIES

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The following guidelines have been put in place by the SIOR Faculty Committee and Education Council for remaining an SIOR instructor.

### GENERAL POLICIES

1. Instructors should be willing to commit a minimum of two days each calendar year for travel and instruction (plus additional time to prepare for each class). However, there is no guarantee of teaching assignments for each instructor. In addition to class time, instructors should expect to spend time preparing for classes, interacting with staff and traveling to class locations.

In some cases, courses may be delivered online and the instructor may have to dedicate time from his/her office to deliver the course material; offer one-on-one student guidance, participate in a chat room, etc. An instructor should be technologically capable to conduct a course online (assistance of which will be provided by SIOR staff).

2. While instructing any class under the auspices of SIOR and the Center for Career Advancement, the instructor shall act in a professional manner, as outlined in the SIOR Code of Professional Standards of Practice (see 2008 guidelines) and as a representative of SIOR. SIOR instructors are not to have any ethics complaints successfully adjudicated against him/her or any disciplinary action by the instructor's state real estate commission during their tenure as an SIOR instructor.

As an SIOR instructor, your affiliation is with SIOR and not the firm that you are associated with. No lecture or communication with students should be construed as an advertisement or infomercial for your firm, product or personal services, or other speaking engagements and educational materials. This includes communication with students following courses while wearing your SIOR instructor "hat."

An instructor is allowed and encouraged to use his/her firm's name on material; offer background information about oneself; share applicable professional experience; and engage in dialogue with students about success or failures as long as it has relevancy to the educational material.

The instructor must be willing to "give" of himself/herself, answering all questions and offering real life case studies and illustrations, regardless of student affiliation.

3. At times, the SIOR Faculty Committee will offer instructor presentation training. These events may be scheduled during SIOR conferences and/or during specific planned times at a mutually agreed upon location. An instructor is encouraged to attend such training unless an excused absence is provided to the SIOR Director of Education. Travel expense reimbursement is not assured.
4. Instructors are reimbursed for course travel, overnight accommodations and food, but an honorarium is not assured for every educational event. SIOR instructor travel reimbursement guidelines have been established can be found on page 13 of the handbook and are also available from SIOR staff.
5. All material used for SIOR designation courses or on behalf of SIOR is owned by SIOR. SIOR reserves the right to take any submitted instructor material and standardize or re-package into an SIOR format or brand. If an instructor wishes to make changes to any part of the course materials, all changes must be provided to and approved by the SIOR Director of Education. SIOR staff will make approved changes to the master copy of materials.

## **TEACHING ASSIGNMENTS – COURSES, SEMINARS AND OTHER TEACHING OPPORTUNITIES**

1. SIOR headquarters offers a limited number of teaching assignments per year based on the number of courses being administered by SIOR. As such, teaching assignments will come from a variety of sources as outlined in numbers 2-5.
2. Designation course locations and dates are selected by SIOR staff with oversight and input from the SIOR Education Council Director and Faculty Committee Chair, as needed.
3. SIOR staff will select topics and instructors based upon course location, schedule, and budget. Instructors will be notified of teaching assignments as early as possible.
4. Instructors may be asked to teach course topics for other educational offerings. These include, but are not limited to, chapter seminars, commercial board and association seminars, and company and network conferences. If you are approached by a chapter or other organization to teach an SIOR topic, please include staff on all correspondence relating to the course. This will enable staff to provide the most up-to-date materials for the offering as well as provide CE credit (where available) and SIOR course credit.
5. Instructors may be asked to participate in SIOR World Conference educational breakout sessions, as requested by the Breakout Subcommittee of the Conference Education Committee. There is no honorarium for conference education programs.
6. Honoraria for chapter seminars will be the same as honoraria for SIOR headquarters designation course offerings. Honoraria for commercial board and association seminars and company and network conferences will be negotiated between the instructor, SIOR staff, and the offering entity.

## **REMAINING AN INSTRUCTOR**

1. All instructor evaluation data will be reviewed by the SIOR Director of Education and the Faculty Committee Chair following each educational offering.
2. To remain an SIOR instructor, an instructor must maintain a minimum score of 4.3 (out of a possible 5.0) on his/her evaluations or score in the top ninety percent (90%) of instructors, whichever is greater.
3. If the instructor receives a score of less than 4.3 (out of 5.0) or scores in the lower ten percent (10%) of all instructors for two consecutive SIOR teaching events; or any three (3) times during their tenure as an instructor, the instructor will be audited and evaluated by the Faculty Committee.
4. After the auditing and evaluating process, the Faculty Committee Vice Chair - Training shall offer recommendations to assist the instructor to improve him/herself and may be offered one more teaching opportunity. However, the SIOR Faculty Committee will weigh all variables and will make decisions appropriate to meet the standards for SIOR education.
5. Any final decisions for dismissal cannot be executed without a review of the evaluations and a presentation audit. A final decision must be made by the SIOR Education Council, based on recommendations from the Faculty Committee and SIOR Director of Education. A written dismissal notice outlining the reasoning behind the decision shall be provided to the instructor by the SIOR Director of Education.

## **INSTRUCTOR OF THE YEAR AWARD**

Each year, one SIOR instructor receives the "SIOR Instructor of the Year Award." The Instructor of the Year Award is determined annually from student evaluations completed by students taking the SIOR designation courses during the calendar year and is presented to the instructor with the highest average score. An instructor must teach a minimum of two times per calendar year to be eligible for the award.

The award will be presented at the SIOR Spring World Conference in the following calendar year. The winner will be presented with a plaque noting the award, will have his or her photo taken with the current SIOR President, and will have the award announced during a general session at the conference.

## **EXPENSE REIMBURSEMENT**

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The following expense reimbursement guidelines have been put into place. Any exceptions made to these policies must be confirmed by SIOR staff in writing. All expenses over the amount of \$25 must be accompanied by a receipt. If you are unsure of whether a particular expense qualifies for reimbursement, please have the expenses pre-approved by SIOR staff.

### **AIRFARE EXPENSES**

Instructors will be reimbursed for air travel to and from courses. SIOR will only reimburse for 21-day advance purchase, coach-class, non-refundable tickets.

Any tickets over \$500 (including taxes and fees) must be approved prior to purchase by SIOR staff. Tickets over \$500 that have not been pre-approved by SIOR staff will only be reimbursed up to \$500.

### **HOTEL EXPENSES**

SIOR staff will make instructor hotel reservations and the cost for the room along with taxes will be charged directly to the master account. SIOR will provide one (1) room night complimentary. If your travel arrangements require additional nights, please seek prior approval from SIOR staff.

### **GROUND TRANSPORTATION**

Instructors are asked to use the most economical form of ground transportation possible. Taxis are preferred. If an instructor requires the use of a rental car for personal/business travel outside of the course, SIOR will reimburse only for an amount equal to a round-trip taxi ride to and from the hotel and airport and will not reimburse for parking at the course location.

If an instructor is local to the course location, SIOR will reimburse for parking at the hotel along with the IRS-approved mileage rate at the time of the course.

### **MEALS**

SIOR will reimburse for meals (when not provided at the course) as is customary. Meals or beverages purchased by an instructor for students will not be reimbursed. If staff or another instructor pays the bill for instructors, instructors are not to submit expense reimbursements for that same meal. If an instructor pays for meals for other instructors, that instructor shall note on the bill who attended the meal.

### **NON-REIMBURSEABLE EXPENSES**

The following expenses constitute non-reimbursable expenses (including, but not limited to):

- Entertainment (to include beverages purchased for students)
- Travel insurance, airline upgrades, etc.
- In-room internet
- Expenses for spouses, friends, guests, etc.

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## **INSTRUCTOR POLICY ACKNOWLEDGEMENT SAMPLE**

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All Instructors are required to sign an acknowledgment at the start of each calendar year. A sample acknowledgment is below; however, a clean copy will be provided by staff to all instructors at the start of each calendar year.

I acknowledge that I have read and received a copy of the Instructor Policy Manual dated \_\_\_\_2009 and hereby agree to follow all policies addressed within the manual.

I acknowledge that I have read and received a copy of the 2009 Instructor Expense Reimbursement Policy dated \_\_\_\_2009 and agree to abide by the reimbursement policies as outlined.

Signature: \_\_\_\_\_

Name (Printed): \_\_\_\_\_

Date: \_\_\_\_\_