



**IAAO**

INTERNATIONAL ASSOCIATION  
of **ASSESSING OFFICERS**

*Valuing the World*

# **Education Manual**

*(Revised December 2025)*

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# INTRODUCTION

*IMPORTANT – IAAO manuals are intended to provide information and guidance. Much of the content of this manual is based upon content in the IAAO Bylaws and Procedural Rules. If there are discrepancies between this manual and the IAAO Bylaws and Procedural Rules, those IAAO governing documents shall prevail. It is the responsibility of the Education Committee to recommend updates to this manual as necessary to ensure its accuracy.*

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## THE EDUCATION COMMITTEE DEFINED

The Education Committee is composed of seven or more members, including one associate member, three coordinators, and three regular or senior instructors. The IAAO President appoints the Chair from among the regular members.

The Education Committee develops, coordinates, maintains, and guides the educational programs of IAAO. The Committee establishes processes for the training, development, and recruitment of new instructors, conducts evaluations of instructor performance and develops criteria for qualifying instructors. Student feedback is reviewed quarterly while pass / fail rates are reviewed annually at the start of a year for the previous year.

The Education Committee will monitor the need to add additional courses and workshops and implement as outlined in the strategic plan.

### **In addition to special projects assigned by the IAAO Board of Directors, the Committee annually:**

- Reviews IAAO curriculum to ensure it conforms to the vision, mission, and strategic goals of the Association.
- Ensures accurate updating and maintenance of the Apendium (Body of Knowledge).
- Ensures the education program reflects the latest valuation and assessment standards, standards of professional conduct and practice, and ethics provisions.
- Plans and monitors the education program and self-paced courses of study.
- Evaluates and updates the Instructor Evaluation Workshop (IEW) to develop and maintain a cadre of diverse and qualified instructors.
- Recommends criteria and requirements for instructor categories; and
- Monitors and evaluates the quality of instructors.

## COMMITTEE APPOINTMENTS

The president and president-elect determine the number of members of each committee and task force, with one member designated as chair for a one-year term. To be eligible for appointment as a committee chair, a member must have met the eligibility criteria listed in the IAAO procedural rules. There may also be a staff liaison, task forces, and subject matter experts assigned to support the work of the committee as needed.

### Committee Roles

The chair coordinates the work of each committee. The chair is responsible for directing the members and activities of the committee to ensure that goals and objectives are met.

#### **The responsibilities of the chair are to:**

- Determine methods by which the committee's charges are met.
- Prepare agendas for meetings and distribute required resources.
- Set expectations for members' contributions and responsibilities.
- Delegate and monitor work assignments.
- Ensure committee work is completed in an efficient and cost-effective manner.
- Recommend committee appointments.
- Ensure that meeting notes are taken and that the minutes are produced.
- Distribute minutes of meetings; and
- Report to the board of directors as requested.

#### **Committee members work toward the fulfillment of IAAO's objectives by:**

- Reviewing all relevant material/background information.
- Completing assignments assigned by the chair.
- Meeting all deadlines.
- Supervising the work of assigned task forces and assisting as necessary; and
- Participating in all meetings and activities of the committee.

Committee chairs must complete IAAO Workshop 171 prior to service on the committee. Committees hold in-person meetings as approved by the president. All expenses for these meetings are paid per IAAO's expense guidelines. In addition, committees use electronic communication for ongoing collaboration throughout the year.

# COMMITTEE TIMELINE

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## SPRING LEADERSHIP DAYS

- Assist headquarters in the rollout and possible improvements of the IEW
  - Review the schedule to deliver rewrites/revisions of current educational material
  - Review education manual for any needed updates
  - Review past year priorities for any needed revisions
- 

## MAY

- Review nominees and selects the recipients of the Professional Development Lifetime Achievement Award and Instructor of Excellence Award
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## FALL LEADERSHIP DAYS

- Review the student enrollment numbers for in-person, virtual and self-study educational offerings monthly and the total numbers of the same annually.
  - Review current course and workshop offerings and materials to set priorities for revisions, updating, rewriting, or retiring.
  - Review delivery plan for any new educational course or materials.
  - Establish education priorities for budget planning.
  - In odd years, evaluate the instructor honorarium.
- 

## THROUGHOUT THE YEAR

- Review the status of the task forces assigned under the Committee
- Review instructor performance and maintenance requirements including the possible addition of continuing education requirements
- Recommend requirements for distance learning educational offerings
- Address any concerns by membership regarding IAAO education

# TASKS AND PROCEDURES

## Types of Educational Offering Formats

IAAO offers five-day educational courses, a workshop series, one-day forums, self-study, and webinars as well as custom contract work. These offerings may be delivered in-person or virtually. A specific number of continuing education credit hours are granted to attendees who attend 90% of an IAAO course or workshop.

- **Five-day educational courses** consist of 30 instruction hours, exclusive of the final examination. Although the structure of each course varies depending on the nature of the material covered, most classroom courses are lecture-discussion type and use problem-solving exercises.
  - Examinations for each course are not mandatory but are highly recommended.
- **Workshops** consist of one- to three-day programs. Examinations, when offered, are not mandatory but are highly recommended.
- **One-day forums** are offerings that do not include an examination.
- **Self-study** is a self-guided course taken at the student's own pace. Examinations for each course are not mandatory but are highly recommended.
- A **webinar** is an online seminar.

# CURRICULUM

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## PLANNING

The Professional Development Department (PDD) shall create and maintain a comprehensive plan that lists all current IAAO education offerings for which continuing education units are awarded (e.g., courses, workshops, one-day forums, and self-study courses). The comprehensive plan will, at a minimum:

- Indicate the most recent revision, update, and/or rewrite date for all offerings.
- Indicate which education offerings are scheduled for revision, update, rewrite, or retirement.
- Indicate all retired education offerings, including date retired.

### Spring Leadership Days

The PDD and the Education Committee (Committee) shall annually review the comprehensive plan during Spring Leadership Days, to coincide with the Committee's task of reviewing the past year's attendance data. The PDD and the Committee shall consider any relevant data and circumstances as part of this review.

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## TYPES OF CHANGES TO CURRICULUM

*Revise:* Clerical corrections that account for errors, such as mathematical, grammar, and formatting.

*Update:* Changes or modernization of material to reflect more current procedures or value estimates as well as changes due to USPAP updates. Any education offering should be considered for update if it has not undergone a rewrite within the five years preceding this review.

*Rewrite:* Substantial changes to the course material

*New:* A course or workshop not previously offered by IAAO. New courses and workshops are identified by a unique course/workshop number and name.

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## DEVELOPMENT

### Procedures

New education offerings and rewrites of all current IAAO materials for which continuing education units are awarded (e.g., courses, workshops, one-day forums, and self-study courses) shall follow these procedures for development.

#### 1. Curriculum Proposal

- a. All new education offerings and rewrites shall make use of the Curriculum Proposal Form. Any IAAO member or IAAO staff member may submit a curriculum proposal to the Professional Development Department (PDD).
- b. The PDD shall periodically present all curriculum form submissions, along with recommendations for projects, to the Education Committee (Committee) for review and consideration.

- c. The PDD shall present Committee-approved curriculum proposals and corresponding Project Plan to the IAAO Board of Directors (Board) for approval.

## **2. Learning Needs Analysis**

- a. Following Board approval, the PDD shall design and conduct a learning needs analysis.
- b. During the process of conducting the learning needs analysis, the PDD shall provide regular progress reports to the Committee.
- c. Upon the conclusion of this process, the PDD shall report its findings and make recommendations to the Committee for approval.

## **3. Subject Matter Expert Selection: Content Contributor**

- a. The PDD and the Committee shall determine the requirements for subject matter experts (SMEs) to serve as content contributors for the project. These requirements should consider the results of the learning needs analysis, along with opportunities for SMEs with diverse backgrounds and perspectives.
- b. The PDD shall issue a Request for Proposal (RFP) based on the requirements for the project. In addition to the RFP, the PDD may reach out directly to specifically identified SMEs to request that they consider the role.
- c. The PDD, along with the Chair of the Committee, and/or the Chair's appointee(s) shall review the RFP submissions and recommend a minimum of two (2) SMEs to the Committee for approval.
- d. The PDD shall offer contracts to the approved SMEs.

## **4. Course Development**

- a. The PDD shall present a course design plan for Committee approval.
- b. The PDD and the Content Contributor SMEs shall collaborate to produce instructional content, activities, and assessments.
- c. The PDD shall provide the Committee with regular progress updates on the project timeline and major checkpoints along the course development process.
- d. To facilitate efficient planning, the PDD shall advise the Committee when it is appropriate to arrange for a pilot course for the material.

## **5. Pilot Testing and Course Materials Review**

- a. The PDD and the Committee shall coordinate at least one (1) pilot course of the material and reach an agreement for the date and mode of delivery (online or in-person) of the pilot course.
- b. The PDD shall make all student materials available to the Committee.
- c. The PDD and the Committee shall collaborate to choose an appropriate instructor, along with one (1) or more Peer Reviewers. The process of selecting Peer Reviewers shall follow the same procedure as developed for the selection of the Content Contributor SMEs.
- d. In addition to the Peer Reviewers, the PDD representative, Education Committee Chair, or their appointees representing either the PDD or the Committee, shall be invited to participate.
- e. The PDD shall report to the Committee on the results of the pilot course, based on evaluations and feedback from all participants and the Peer Reviewers. The report should include areas in need of improvement, along with other recommendations for changes.
- f. If revisions are substantive in nature, the PDD and the Committee should consider another pilot course.

- g. After all changes from the pilot course have been incorporated into the material, the PDD shall make available the final student materials to the Committee for approval.
6. **Upon approval from the Committee, the course shall be adopted into the curriculum following an “instructor rollout”** (See section on Maintaining Instructor Status > Staying Current on IAAO Course Material) and has received Appraisal Qualification Board approval (if required).

## Course Material

Course materials include the Student Reference Manual (SRM), PowerPoint® presentations, exercises, quizzes, exams, and answer sheets and other supplemental materials created as part of the course or workshop (e.g., job aid, textbook, prework assignment).

**No instructor may alter or delete any course materials provided in an IAAO course.** Instructors must use the most recent version of the student reference manuals for each assignment. The most recent version can be obtained by contacting the Professional Development Department. Failure to do so may be cause for immediate suspension of the instructor’s active status and possible removal from teaching IAAO assignments in the future.

Student reference manuals contain problems and case studies for classroom instruction. Instructors are strongly encouraged to use PowerPoint® and other technologies available in the presentation of IAAO materials. Instructors may provide, at their own expense, additional teaching materials, including extra problems, visual teaching tools, and study sessions. Instructors assume responsibility for obtaining copyrights or permission to use copyrighted material as additional teaching material.

All materials must be obtained through the Professional Development Department. **Materials may not be duplicated or distributed without explicit written permission from IAAO.**

## Addressing Errors in Student Materials

Students taking the courses have an opportunity to report errors through the evaluation at the end of the course or workshop. The following steps describe the process for addressing those errors:

1. Instructor and student comments are received through the normal evaluation process; students may provide comments in the course evaluation survey following completion of the course while instructors provide feedback via email to the Professional Development Department. Feedback will be reviewed by Professional Development staff, who will correct any obvious clerical and/or mathematical errors.
2. Questions involving the substance of the education material will be sent to the Education Committee, who will identify subject matter experts as needed.
3. Professional Development staff will work with SMEs, who will make the appropriate changes in the education material and notify instructors of the changes.

For courses offered in a virtual/live-online format, the Professional Development Department may virtually audit a course for the specific purpose of identifying and correcting errors in real time.

# EDUCATION PROGRAMMING

## TYPES

IAAO offers three different types of programs for instructor-led educational offerings: Certified, Contract, and IAAO-Conducted.

This chart identifies the sponsor’s (coordinator’s) responsibilities as they relate to certified and contract courses. The paragraphs that follow explain the chart in detail.

<b>SPONSOR...</b>	<b>In a CERTIFIED offering</b>	<b>In a CONTRACT offering</b>
Secures instructor and pays fee	X	IAAO
Arranges classroom facilities (live or virtual)	X	X
Pays cost of A/V equipment	X	X
Completes student registration (including collecting tuition and fees)	X	X
Determines the minimum class enrollment	X	IAAO (minimum 25)
Is billed on a per-student basis	X	X
Receives student materials from IAAO	X	X

### Certified Program

Local coordination of IAAO educational programs is limited to IAAO chapters, affiliates, government agencies, independent education providers, and higher educational institutions. In a certified program, the coordinator is responsible for securing the instructor and the sponsor will be responsible for all expenses and honoraria incurred by and for the instructor if this is the agreement between the sponsor and the instructor. The instructor must be a currently approved IAAO instructor. The Professional Development Department maintains a listing of instructors by classification (Junior, Regular, or Senior), by platform (i.e., virtual/live-online or in-person) and by courses that they are approved to teach. A list of differences of classifications is found in the Instructor Category section of this manual. Once an instructor is selected, it is the responsibility of the coordinator to contact the instructor and work out the details of the assignment (date, number of students, lodging, transportation, fees, and expectations as well as learning platform if in a live-online format).

The coordinator will arrange for classroom facilities. The coordinator will also assume the cost of all audiovisual equipment ordered for the program(s), if any. The coordinator will handle all registration, including the collection of tuition and fees. IAAO will bill the coordinator on a per student basis for each student attending.

The coordinator determines the minimum class enrollment.

IAAO will provide program materials to the coordinator, including the program’s Student Reference Manual, quizzes, solution pages, and final examination and other supplemental materials required to complete the course or workshop. IAAO will assume a one-time shipping charge based on the enrollment estimate given by the coordinator at least 15 business days in advance of the first day of the program(s). If a final enrollment figure is not given at least 15 business days before the first day of the program(s), the coordinator agrees to pay the necessary additional charge which may be incurred by IAAO to ensure the timely arrival of the material. If additional material is to be shipped by IAAO because of an underestimate of enrollment by the coordinator, the additional charges will be assumed by the coordinator. The coordinator will receive a shipping inventory sheet which will list the number

of boxes sent, contents of the boxes, date shipped, and method of shipping used. For virtual courses, electronic materials will be sent directly to students. If a hardcopy is requested an additional shipping fee may be incurred not to exceed \$25 per shipment.

## **Contract Program**

In a contract program, the coordinator will arrange for all classroom facilities, and IAAO selects the instructor, unless the contract specifies otherwise. When conducting a contract program, IAAO does not reimburse for travel expenses and pays the instructor a flat fee negotiated by the PDD using the Instructor Honoraria as a guide, dependent on the instructor's status. The coordinator also assumes the cost of all audiovisual equipment ordered for the program(s). The coordinator will handle all registration, including collection of tuition and fees. IAAO will bill the coordinator on a "per student basis" for each student attending.

Contract courses have a minimum enrollment requirement of 25 students.

IAAO will provide program materials to the coordinator, including the program's Student Reference Manual, quizzes, solution pages, and final examination and other supplemental materials required to complete the course or workshop. IAAO will assume a one-time shipping charge based on the enrollment estimate given by the coordinator at least 15 business days in advance of the first day of the program(s). If a final enrollment figure is not given at least 15 business days before the first day of the program(s), the coordinator agrees to pay the necessary additional charge which may be incurred by IAAO to ensure the timely arrival of the material. If additional material is to be shipped by IAAO because of an underestimate of enrollment by the coordinator, the additional charges will be assumed by the coordinator. The coordinator will receive a shipping inventory sheet which will list the number of boxes sent, contents of the boxes, date shipped, and method of shipping used. For virtual courses, electronic materials will be sent directly to students. If a hardcopy is requested an additional shipping fee may be incurred not to exceed \$25 per shipment.

Teaching assignments will usually be made 30 or more days before the first day of the program. All assignments are made on the assumption that the instructor will teach one class of 50 or fewer students for 30 instructional course hours or the assigned number of workshop hours and proctor the final examination.

## **IAAO-Conducted Program**

An IAAO conducted program is one in which IAAO is responsible for promotion, student registration, on-site distribution of materials, classroom facilities, audiovisual equipment, preparation and shipment of materials, instructor selection, honorarium, exam processing, and student record maintenance. IAAO will assign instructors and send a confirmation letter and contract for teaching assignment to the instructor. Teaching assignments will usually be made 30 or more days in advance of the first day of the program. All assignments are made on the assumption that the instructor will teach one class of 50 or fewer students for 30 instructional course hours or the assigned number of workshop hours and proctor the final examination. For virtual courses, proctoring will be handled through an electronic proctoring service provided by IAAO.

IAAO senior instructors receive preference when making assignments. Instructors are selected based on student survey results, pass/fail rates, and the instructor's skill set as determined by the Professional Development Department usually more than 30 days prior to the start of the class. Instructors will be selected on a rotational basis. If an instructor declines an assignment, his/her name will be returned to the bottom of the rotation.

# COORDINATOR CERTIFICATION PROGRAM

**All IAAO Coordinators are required to complete the following within a two-year certification cycle:**

- Sign and adhere to all necessary paperwork per the Professional Development Department:
  - IAAO Confidentiality Agreement
  - Education Manual Acknowledgement including content specific to coordinator requirements, procedures, and expectations
  - IAAO Code of Ethics Agreement
- Attend instructor/coordinator meetings provided throughout the year by the Professional Development Department or review the recordings. Valuable information is provided in these meetings on material updates and procedural changes.
- Commit to reviewing student feedback for every course provided in which feedback is given (provided by the Professional Development Department).
- Complete IAAO Workshop 171: IAAO Standards of Professional Practice and Ethics (one-time requirement).
- Take IAAO Workshop 411: Building a Healthy Workplace (one-time requirement). If state or local laws prohibit the content of the course, coordinators are allowed to opt-out.

*NOTE:* Similar to the Instructor Certification Program that resides in the IAAO-U portal, PDD will develop a Coordinator Certification Program (CCP) in which coordinators will be able to access the above requirements. The CCP will launch on June 30, 2024. The proposed deadline for completing the above-referenced requirements is December 31, 2024. PDD will follow up throughout December to ensure all have maintained certification.

# ROLES AND RESPONSIBILITIES: COORDINATORS

Local coordination of IAAO educational programs is limited to IAAO chapters, affiliates, government agencies, independent education providers, and higher educational institutions. Coordinators are prohibited from providing IAAO materials from any source other than IAAO. IAAO reserves the right to disallow certification hours and refuse to grade examinations should non-authorized material be used. In addition, the IAAO logo, name and trademark are protected by copyright laws. Their unlawful use is prohibited by law including within website names and URLs.

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## SETTING UP A PROGRAM: Courses, Workshops, and One-Day Forums Application Procedures

### Coordinator checklist for certified programs

- Determine the fee to be paid to the instructor
- Send contract to the instructor
- Determine travel and lodging arrangements
- Determine classroom setup and be sure that the instructor's needs are being met
- Determine instructor's A/V requirements
- If virtual, provide a platform for the course if the instructor is not doing so.
- Establish SRM distribution (whether in class or at registration)
- Complete IAAO Education Program Application found in the Education/Coordinator section of the IAAO website.
- Collect fees

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## COORDINATOR CHECKLIST FOR CONTRACT PROGRAMS

- Determine travel and lodging arrangements
- Determine classroom setup and be sure that the instructor's needs are being met
- Determine instructor's A/V requirements
- If virtual, provide a platform for the course if the instructor or IAAO is not doing so
- Establish SRM distribution (whether in class or at registration)
- Complete IAAO Education Program Application found in the Education/Coordinator section of the IAAO website.
- Collect fees

For IAAO conducted courses, IAAO assumes all responsibilities of the coordinator.

## RETURNING MATERIALS

The coordinator assumes liability for all program material and textbooks from IAAO and agrees to return unused materials to IAAO in their original shrink-wrap, if applicable, within five days after course completion. IAAO will not accept returned textbooks or opened student materials not in their original condition or after five days following the class. In addition, only two Student Reference Manuals and supplemental materials (e.g., unopened Solution Sets, textbooks, etc.) will be accepted for return without a restocking fee. An additional three Student Reference Manuals and supplemental materials may be returned and will incur a 25% restocking fee. The maximum number of sets of student materials allowed for return is five.

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## MARKETING AND PROMOTION

IAAO will promote all programs scheduled at least two months in advance of the program, through the IAAO *Fair + Equitable* and IAAO's website.

Sponsors and coordinators have the option of having their programs listed in these publications.

# ROLES & RESPONSIBILITIES: INSTRUCTORS

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## RESPONSIBILITIES

The procedures outlined below are to be followed unless the Professional Development Department has given prior written approval for variations. Instructors should read this section to familiarize themselves with the functions of IAAO.

### **IAAO instructors *must*:**

- Admit all students who have registered for the offering.
- Teach the program assigned to them.
- Teach the specified number of hours for workshops and courses (exclusive of the final examination) in accordance with IAAO requirements for CEUs
- Administer all final examinations or direct students to online proctored exams set up by the Professional Development Department.
- Report any violation of examination security, class admission procedures, or alterations in the class schedule.
- Maintain a class attendance record and return it to IAAO and the coordinator. Students will not receive CEUs without a record of attendance. For virtual, live-online courses, this means students must have a webcam and be seen by the instructor who will take attendance several times throughout each day.
- Collect all materials and exams following the appropriate exam time allotted.
- Distribute instructions to students for completing online evaluation form for all classes instructed.
- Complete and return the logistical report/instructor comment report (formerly known as “the pink sheet”). Any corrections should be recorded on the instructor comment form included in the material and returned with test results. IAAO staff will review the errors to establish which are clerical/formatting errors and which represent appraisal problems. When the error is clerical or formatting, it will be corrected by staff on the electronic copy and a hardcopy reproduction printed. When the error is not easily identified as clerical or formatting, staff will work with identified SMEs to correct in a timely manner.

### **IAAO Instructors are *not* responsible for:**

- Collecting tuition or fees.
- Distributing materials that should be distributed by the sponsor; or
- Administering examinations to anyone not properly registered.

### **IAAO Instructors *must not*:**

- Allow students to take the examination without IAAO permission.
- Give answers to any examination questions.
- Grade student examinations; or
- Indicate to a student whether they passed the examination.

## APPLICATION AND SELECTION REQUIREMENTS

All IAAO instructors must be members in good standing. All instructors must complete the Instructor Evaluation Workshop (IEW).

Prior to attending an IEW, all applicants are required to submit a detailed application to the Professional Development Department. All applications must be accompanied by a full resume. Any applicant with insufficient relevant experience or education may be rejected.

**Each applicant must present proof satisfying at least one of the following requirements:**

- A minimum of a bachelor's degree in any field and five years of experience directly related to the subject matter to be taught.
- Five years of teaching experience in real estate valuation directly related to the subject matter to be taught. To qualify as teaching experience, the educational offering must meet at least one of the following minimum requirements:
  - Approval by the Appraisal Qualifications Board Course Approval Program.
  - Offered by a governmental valuation licensing/certification agency for credit.
  - Taught through an accredited college or university; or
  - Approved for credit through an established professional valuation organization, jurisdictional assessor, or valuation agency.
- Five years of specialty teaching (cadastral mapping or assessment administration) experience directly related to the subject matter to be taught.
- Seven years of real estate valuation experience directly related to the subject matter to be taught.
- Seven years of specialty experience (cadastral mapping or assessment administration) experience directly related to the subject matter to be taught.

One year of valuation experience is defined as a calendar year where more than 50% of the professional time was spent appraising real property, personal property, or businesses; and where a significant portion of income was derived from performing (real property, personal property, or business) valuation services.

One year of specialty experience is defined as a calendar year where more than 50% of the professional time was spent performing cadastral mapping or assessment administration and where a significant portion of income was derived from providing cadastral mapping or assessment administration services.

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## **INSTRUCTOR EVALUATION WORKSHOP (IEW)**

Each instructor for IAAO must have attended and passed an Instructor Evaluation Workshop (IEW) either in classroom or virtually. The IEW must have been sanctioned by the Education Committee.

The IEW is an intensive three-day interactive workshop used to qualify individuals to teach for IAAO. The IEW can be taken in either a virtual format, an in-person format, or both.

Students who successfully complete the virtual IEW may later take the in-person IEW at a discounted rate for the entirety of the workshop or choose to present only on the final day at a further discounted rate. Either option, if passed, qualifies for teaching in-person courses.

Students who successfully complete the in-person IEW may later take the virtual IEW at a discounted rate for the entirety of the workshop or choose to present only on the final day at a further discounted rate. Either option, if passed, qualifies for teaching virtual courses.

### **Expectations**

The IEW is not intended to teach individuals how to instruct, but to evaluate participants' ability to teach IAAO material in a classroom setting. Each participant is expected to understand the general subject matter and any specific course material to a degree they can answer typically asked questions from students on the course. They should expect to spend at least 30 hours in advance preparing an initial five-minute presentation. During the IEW, they will be expected to develop three additional five-minute practice presentations, and one final 10-minute presentation. Participants must demonstrate and are evaluated on their teaching style, classroom presence, ability to engage learners, clarity and accuracy of their classroom presentation, familiarity with and comprehension of the course material, and organization of subject matter.

### **Senior Instructor Evaluation Panel**

The instructor evaluation panel is selected by the Professional Development Department and approved by the Education Committee. The panel must be senior instructors who are experts in the coursework. Members of the panel will be rotated each year to allow for a broader range of opinions of the participants, especially for those who have taken the workshop more than once. It is advised that one panel judge has experience judging at least one previous IEW.

The instructor panel's decision is final. Participants who do not pass the IEW will receive specific feedback from the instructor panel and are welcome to attend a future IEW.

## INSTRUCTOR CATEGORIES

There are junior, regular, and senior instructors. The following is the progression of instructors:

### Junior Instructor

**A junior instructor is defined as having successfully completed the following:**

- An IEW
- Attended at least 50 minutes of each 60 minutes of instruction and passed the final examination or served as either an author or reviewer of the IAAO course or workshop they wish to instruct.

Equivalent education and examination challenges do not substitute for this requirement.

### Regular Instructor

A regular instructor must successfully complete an evaluation assignment and have attended at least 50 minutes of each 60 minutes of instruction and passed the final examination, or served as either author or reviewer, of the course or workshop they wish to instruct. Equivalent education and examination challenges do not substitute for this requirement.

### The Evaluation Assignment

An evaluation assignment pairs a junior instructor with a senior instructor. Evaluation assignments are arranged by the Professional Development staff. A junior instructor may accept an evaluation assignment for a course he/she is eligible to teach. During the assignment, the junior instructor must teach at least 10 hours of a 30-hour course; however, is not permitted to instruct on the afternoon of the day preceding the exam.

The senior instructor will function as an evaluator of the junior. The senior instructor will complete an evaluation form provided by the Professional Development Department. Specific information about the junior instructor and about the procedures for overseeing and evaluating the junior instructor will be given to the senior instructor prior to the course.

The Education Committee will take both the senior instructor's evaluation and the student evaluations of the junior instructor from the course into consideration before granting regular instructor status to the junior instructor.

Junior instructors on an evaluation assignment do not receive an honorarium, but travel, hotel, and food will be reimbursed by IAAO up to the maximum allowed if the assignment is completed within three years of their initial IEW completion. The maximum expense reimbursement is subject to IAAO expense reimbursement policy. Contact the Professional Development Department for more information.

### Senior Instructor

A senior instructor must have met the requirements of a regular instructor, hold an IAAO professional designation, and have completed three teaching assignments as a regular instructor.

## COURSE ELIGIBILITY

Before being allowed to teach a workshop or course, an instructor must take the class in-person or virtually. In addition, they must pass the student exam, if one exists, with a minimum score of 85%. If an instructor has challenged the exam and achieved a passing score, they must still audit the course (at no expense) before being allowed to teach it. For courses with instructor exams, the instructor must pass that exam with a minimum of 85% as well. Alternatively, an instructor may be eligible to teach a workshop based on the workshop eligibility matrix.

All instructors should provide the Professional Development Department with a list of courses they feel qualified to teach. Instructors must have relevant knowledge and experience, and be aware of their strengths.

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## MAINTAINING INSTRUCTOR STATUS

**All instructors must meet the following requirements within the two-year certification cycle.**

- Pay IAAO member dues
- Complete all necessary paperwork per the Professional Development Department (e.g., confidentiality agreement, signed acknowledgement of current instructor requirements and procedures, etc.).
- Attend instructor meetings provided throughout the year by the Professional Development Department or review the recordings. Valuable information is provided in these meetings on material updates and procedural changes. Instructors who do not meet this requirement must attend the current year's meeting before they will be added to the active instructor list.
- Complete IAAO Workshop 171: IAAO Standards of Professional Practice and Ethics initially, then another ethics offering every two years.
- Take IAAO Workshop 411: Building a Healthy Workplace. If state or local laws prohibit content of the course, instructors are allowed to opt out.
- Attend at least one hour of education every year related to presentation, facilitation skills, adult learning theory, use of technology in the classroom, or public speaking, either live or online. Training will be made available on the IAAO learning management system under the Instructor Resource Center. Documentation shall be submitted to the Professional Development Department as proof of completion.
- All instructors, except those currently serving on the IAAO board or as an officer, must instruct an IAAO course/workshop/one-day forum at least once in a period of two consecutive years. Instructors who do not meet this requirement will be removed as active instructors and must attend and pass another IEW in its entirety.
- Senior instructors must maintain their IAAO designations including the USPAP requirement.

### Guidelines if Instructor Lapses

Anyone who has not met the requirements by the end of their certification cycle will be placed on probation for six months from teaching any course. Those who do not satisfy all the requirements within these six months will lose their instructor status. To regain their status, they will be required to satisfy the requirements (including paying previous and current years' dues) and complete an in-person IEW or complete an evaluation assignment with a senior instructor.

Instructors are responsible for checking their status via the Instructor Certification Program in the IAAO learning management system where outstanding requirements can be found.

Instructors who are serving on the board or as an officer may request the Education Committee allow more time to fulfill these requirements.

There is no tenure for instructors. Maintaining instructor status depends on continued good teaching practices in the classroom and good standing with IAAO.

## **Staying Current on IAAO Course Material: Rewrite**

**When there is a rewrite of a course/workshop, instructors must pass the student exam with a minimum score of 85%, and meet one of the following criteria to become certified on the new material:**

- Audit the course/workshop at no charge.
- Attend a course overview at the next IAAO Annual Conference following the rewrite.
- Attend a local review, which can be offered by local chapters or state coordinators and are instructed by previously certified instructors.
- Participate in a webinar review of the updated course materials.

If changes in a rewrite are significant, the Education Committee may limit options to an audit of the course/workshop at no charge. In such case, a passing score of 85% on the student exam is required.

## **Staying Current on IAAO Course Material: New Curriculum**

**When a new course or workshop has been developed, instructors must meet one of the following criteria to become certified on the new material:**

- Attend a course overview at the next IAAO Annual Conference following the course development and pass the student final exam, if one exists, with a minimum score of 85%.
- Attend a local review by an instructor who is qualified in the material and pass the student final exam, if one exists, with a minimum score of 85%.
- Participate in a webinar review of the new course/workshop and pass the student final exam, if one exists, with a minimum score of 85%.

Instructors have 12 months from the date of public notice on the IAAO website that a new course or workshop has been developed to meet the requirements and, if not, the instructor must attend and pass the exam for the course or workshop at their own expense.

The rollout of a new course will be presented to current instructors by the Subject Matter Expert(s) (SME) who created the new material. Feedback from both the SME and those attending the class will be considered for any revisions to the course. The instructors attending will take the final exam and must pass with a score of at least 85% to begin the qualification process to teach the new material. If an instructor's exam exists for the material, they must also pass that exam.

If the new course is such that the course materials cannot be adequately covered with the above options, the Education Committee may require instructors to audit the course/workshop at no charge to become approved and pass the student final exam, if one exists, with a minimum score of 85%.

The exam may be taken after the training, or with a proctor according to IAAO rules and procedures. IAAO will provide the proctored exam at cost (expenses only) for each instructor attending the course overview, local review, or webinar.

The Director of Professional Development and/or the Education Committee may make exceptions as deemed appropriate.

# INSTRUCTOR ASSIGNMENTS

## Process

The Professional Development Department is responsible for assigning instructors to IAAO-conducted as well as contract courses and workshops. This is done initially by email, followed by a written confirmation letter and contract. Only staff may make instructor assignments. The sponsor of a certified program is responsible for selecting the IAAO approved instructor.

On occasion, a sponsor or coordinator may directly ask an instructor to teach at its IAAO contract program. Unless this is for a certified program, the instructor shall refer all such requests to the Professional Development Department. All certified program negotiations concerning salary and expense reimbursement are carried out between the instructor and the contracting coordinator.

### **The confirmation letter from IAAO confirms the teaching assignment and provides the following information:**

- Last revision dates of the SRM – instructors are expected to update their materials to reflect the most accurate and current content to be in alignment with the materials students will receive.
- Program to be taught
- Dates and location of the program and whether live in-person or live-online/virtual
- Location of classroom facilities and name and address of the local sponsor

For contract and IAAO-conducted courses (including both in-person and virtual), instructors sign and return the contract to IAAO, retaining a copy for themselves. A countersigned copy of the contract will be forwarded to the instructor.

## Course Materials

Instructors should consult their dashboard in Learn (the IAAO LMS) to determine if they have the most current courseware. Because courses see frequent updates and revisions it is required that instructors check revision dates of the courses listed in the LMS (located in [learn.iaao.org](https://learn.iaao.org)).

Digital copies of courseware will be provided at no charge to instructors. Instructors may print the SRM for their own use. Requests for hardcopies of SRM's are available from the Professional Development Department and require the instructor to pay the shipping fee.

## Virtual Teaching Requirements

With the increased use of virtual format for courses, instructors will need to meet requirements to teach IAAO material. Instructors who obtained their status before the invent of virtual IEW, will be grandfathered in to teach virtually if they meet the following requirements prior to the 2021 in-person IEW:

1. Take an instructional course from IAAO on the use of virtual technology
2. Teach a virtual course achieving positive feedback from students and the coordinator of the course

After the 2021 in-person IEW, instructors will be required to pass a virtual IEW to teach virtually.

## Evaluations

The Director of Professional Development shall review all course and workshop evaluations as they are submitted. The Education Committee shall conduct a quarterly review of all student comments and an annual review of instructor pass/fail rates. The review will be done anonymously. The Committee will only have the instructor identification number as an identifier for each instructor to eliminate bias. The Committee shall recommend training and quality improvement measures for the instructor cadre.

### Pass/Fail Rates

The class list is provided to coordinators showing the number and names of students who passed, failed, or did not take the exam (NE). Students will have the option of opting out of having their score released to coordinators to protect their privacy. Instructors will not be given names.

All instructors will be evaluated based upon their student evaluations, including student feedback and pass rates in relation to the national course average. The normal acceptable range is determined by using +/- 1.5 standard deviation from the national course average.

### Student, Coordinator, and Instructor Comments

Special attention will be paid to any significant comments by students or coordinators brought to the attention of the Professional Development Department staff. Instructors receive the same feedback and are encouraged to take appropriate action to remedy any problems. Poor instructor performance may result in either temporary or permanent suspension of instructor status.

### Evaluation Process

The Education Committee may conduct evaluations and investigate individual situations in response to complaints about an instructor. The Education Committee shall review existing guidelines biennially. The guidelines should include provisions for a quarterly review of the instructor evaluation process.

Any instructors serving on the Education Committee will be evaluated by the Chair of the Education Committee or any representative the chair appoints. The on-site coordinator, Director of Professional Development or Education Committee may take immediate action to prevent damage to the integrity or reputation of the IAAO education system.

If an evaluation is returned to the Professional Development Department that warrants review due to the disappointing nature of the pass/fail percentage or student comments between quarterly reviews, the Director of Professional Development should inform the Committee Chair immediately so the situation can be addressed. The Committee Chair and Director of Professional Development will immediately begin an evaluation of the complaint.

## Instructor Grievance Process

**The evaluation of the grievance may include one or more of the following actions:**

- interview with the instructor about the noted concerns
- interview with the coordinator about the noted concerns
- the course's surveys including the comments, pass/fail rate, number of surveys returned, and number of positive surveys weighed against the negative surveys. Any major infraction can be considered independent of other comments.
- conference call with the complainant(s) or follow-up by written correspondence to confirm the details of the complaint(s)
- telephone interviews from randomly selected participants in the course/workshop relating to the complaint(s) or the sponsor for the course

- written copy of the complaint(s) (with names of the complainant(s) omitted) sent to the instructor. The instructor will have 10 days to respond to the Education Committee and may request a meeting with the Committee.

The Education Committee Chair and Director of Professional Development will report their findings to the Committee. The Committee will then make the final decision on the appropriate action to take.

## **Education Committee Decisions Regarding Grievances**

**The Committee shall review all information and will take one of the following actions with the instructor.**

- No action to be taken
- Written reprimand to the instructor, with the reprimand being placed in the instructor's file
- Written reprimand requiring the instructor to recertify by attending an IEW before instructing again
- Conduct a review with the Chair of the Education Committee and at least two senior instructors approved by the Committee but not currently serving on the Committee. Failure to follow recommendations arising from this review may result in the removal of instructor status.
- Removal as an instructor

The Committee will notify the instructor, in writing of their findings. If the offense is considered worthy of the instructor's removal from the instructor cadre, the Education Committee may first conduct the above-mentioned reprimands, IEW, and review steps before the removal letter is sent to the instructor.

If any instructor violates the instructor's conduct requirements or commits an ethics violation, this will result in an immediate suspension of instructor status and will be reported to the Ethics Committee for review and will not be eligible for appeal or reinstatement through an IEW.

**An instructor's status will also be revoked given any of these circumstances:**

- upon a severe violation of the education manual directives
- if two reprimand letters have been sent for the same violation
- if more than three documented phone calls have been made to the individual regarding their behavior in class previously.

Unlike an infraction involving an ethics violation, the other aforementioned infractions may be appealed. The coordinator, Director of Professional Development, or Education Committee may take immediate action to prevent damage to the integrity or reputation of the IAAO education system.

## **INSTRUCTOR APPEALS PROCESS**

If an instructor wishes to file an appeal of their removal, it must be done within 30 days of the date of the letter. The instructor must send a written appeal detailing their objections to the removal and their defense of their teaching status, to the IAAO President, Director of Professional Development, and the Chair of the Education Committee.

### **Level 1 Appeal**

The Education Committee will consider the appeal, along with the previously gathered information. The Education Committee may choose to further investigate using any of the guidelines if they feel more information is needed to reach a decision in the case. The Education Committee will notify the instructor in writing within 14 days of their decision.

### **Level 2 Appeal**

If the instructor wishes to appeal the Level I decision, the instructor may appeal to the Board of Directors within 14 days of the date of the Level I decision letter. The Board of Directors' decision will be final.

The instructor will be notified in writing of each level's decision. To appeal to the next level, the instructor will need to notify the same individuals in writing of their wish to appeal further, 14 days after the date on the letter. The appeal process will take no longer than 90 days for all levels.

### **Regaining Instructor Status**

An instructor who is removed for an infraction other than a conduct, ethics or jurisdictional issue may regain their instructor's status if they take and pass another IEW. If the instructor has lost their rights to teach virtually, they will be required to take the virtual IEW and pass. Removal for other reasons may require them to take both the virtual and classroom versions of the IEW depending on the offense and the format in which it occurred.

# COURSE ADMINISTRATION

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## ON-SITE ADMINISTRATION

At a contract or IAAO-conducted course, IAAO will attempt to keep the administrative duties of an instructor to a minimum, however, it may be necessary to assign certain administrative duties to instructors, particularly when IAAO staff members are not present.

On occasion, a coordinator may request that an instructor perform an administrative function that may conflict with the instructor's duties. Instructors should inform the coordinator that they have no authority to assume such responsibilities or to alter in any way the normal procedures as outlined in this manual without authorization from IAAO.

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## DISTRIBUTION OF MATERIALS

The process for distribution of course materials vary depending on the platform for the course, in-person or virtual.

### In-person

Materials for courses or workshops will be shipped to the sponsor so that it arrives at least a week prior to the course or distributed in an electronic format, if requested. Students receive their SRM at registration or in the classroom; the coordinator will determine this. There may also be materials that the instructor distributes during the course.

The coordinator must open each shipment upon receipt and notify IAAO immediately if the shipment is incorrect or incomplete.

### Education Record Scanner Forms

Instructors shall distribute the education record scanner forms to the students on the first day of class, and have the students fill out everything except the "test section." **All students should fill out a scanner form, whether they plan on taking the exam or not so there is a record of their attendance.** IAAO asks that instructors personally review or have the class review each other's forms for errors. On the last day of the course, instructors provide the students time to review their form before handing out the examination booklet.

Instructors should send the completed scanner forms attached to the cardboard by rubber band in one alphabetical stack.

In classes where the instructor has access to a scanner, they should scan the exams and email to [courses@iaao.org](mailto:courses@iaao.org) for faster student results delivery.

*Note: Each student in the class should have the same information entered for the class number, course and section, activity number, and E Ser number.*

1. **Name:** First and last.
2. **Course Number:** The three-digit reference code number of the course.
3. **IAAO ID:** This information should be obtained from the course sponsor. Every student will have an IAAO ID, whether they are an IAAO member.
4. **Email Address:** Students should write their entire email address in this field. All results are delivered electronically and will be sent to the address indicated on this form.

5. **Activity Number:** This is the tracking number assigned to the class (i.e., 0000063571) and is used for accounting and Professional Development Department record keeping. If you are unsure of the course's activity number, it is listed on the examination security form.
6. **E SER Number:** Serial number of the course exam. Every course exam has its own unique exam serial number. Please note that this number is different from the exam booklet number. If you are unsure of the exam serial number, it is listed on the examination security form.
7. **Exam Number:** This is a five-digit number and is in the upper right-hand corner of each exam booklet. Students should *not* have the same number in the E SER NUMBER as they have in the EXAM NUMBER boxes.

### Attendance Sheets

IAAO enforces strict attendance policies for courses, workshops, and seminars, and requires attendance sheets to ensure that students receive credit from their state organizations for attending IAAO programs. The student attendance sheets should be taken on the morning and afternoon of each day of class. If the student is not in attendance for either a morning or afternoon session, the instructor should mark an X in the spot where the initials should be, so that a student cannot go back to fill in their initials for sessions that they missed. At the end of the course these forms should be returned to IAAO along with the other materials in the Examination Evaluation Packet (EEP). These attendance forms will be kept at IAAO.

Students must attend 90% of the class hours to achieve the full number of educational hours offered for the course. Anything less than 90% attendance will result in zero hours of credit.

### Virtual

Course coordinators should submit to the Professional Development Department their rosters no later than 15 business days prior the start of the course. Students will receive course materials no later than one week prior to the start of the course through the IAAO LMS ([learn.iaao.org](http://learn.iaao.org)).

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## ATTENDANCE

IAAO enforces strict attendance policies for courses, workshops, and seminars, and requires attendance tracking to ensure that students receive credit from their state organizations for attending IAAO programs. For this reason, webcams and mics are required of students attending virtual (live online) classes. (NOTE: they are required to complete an online exam as well). Student attendance should be taken on the morning and afternoon of each day of class. If the student is not in attendance for either a morning or afternoon session, the instructor should note when a student is absent. At the end of the course this information should be submitted to IAAO at [courses@iaao.org](mailto:courses@iaao.org).

Students must attend 90% of the class hours to achieve the full number of educational hours offered for the course. Anything less than 90% attendance will result in zero hours of credit.

## INSTRUCTIONAL HOURS

IAAO instructors must ensure that the courses they teach run the allotted 30 hours. No sponsor may reduce the total required number of hours. Unauthorized abbreviations of a course may cause IAAO or the sponsor to reassess the credit granted and may also affect the instructor's annual performance rating. It will be considered an instruction infraction if an instructor does not teach the full required hours and may result in the Education Committee conducting an instructor evaluation per the guidelines above.

**The following is the recommended schedule for all courses.**

Monday (registration)	7:30 a.m.-8:00 a.m.
Monday (instruction)	8:00 a.m.-5:00 p.m.
Tuesday (instruction)	8:00 a.m.-5:00 p.m.
Wednesday (instruction)	8:00 a.m.-5:00 p.m.
Thursday (instruction)	8:00 a.m.-5:00 p.m.
Friday (review/exam)	8:00 a.m.-5:00 p.m.

*NOTE:* Virtual course offerings could result in an altered course schedule to accommodate students from multiple time zones.

Instructors should allow at least a 10-minute break every hour for students and a lunch break of 30-60 minutes. Depending on the coordinator, some courses may not meet for five days in a row. Courses, for example, may meet one day a week or for several days over an extended period. Coordinators may alter the recommended schedule if they advise IAAO of their intention prior to the course and schedule for the appropriate number of hours. Schedules for workshops should consider the specified number of instructional hours. For examinations, allow 2 1/2 hours for workshops, and three hours maximum for courses.

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## STUDY PERIODS

As an option, instructors may conduct additional study periods in the classroom or other public area beyond the normal 30 instructional hours. Instructors should not require attendance at the study periods or consider them a substitute for the normal 30 hours of classroom instruction. In a review session the instructor shall not use or refer to an examination or questions in the examination.

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## UNIFORM REQUEST FOR RECERTIFICATION CREDIT FORMS

These forms are available for students seeking recertification credits from their state appraisal board or from other professional associations. For an in-person class, the coordinator receives the form with the other instructional materials. For a virtual course, students or coordinators may request the form from IAAO by emailing [courses@iaao.org](mailto:courses@iaao.org). Instructors should sign the paper form on the appropriate line, called "signature of instructor or program official". Virtual forms are already signed.

*Note: These forms should not be distributed until the completion of the course.*

## INSTRUCTOR/COURSE EVALUATION

Course evaluation information should be given to students with instructions on how to visit the link provided in the Examination Evaluation Packet (EEP) box. Please encourage all students to complete this anonymous evaluation of the instructor and course experience. Feedback will be shared with instructors, coordinators, Professional Development Department, and the Education Committee.

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## COURSE CANCELLATION

**Cancellation protocols differ depending on who cancels the offering:**

- **IAAO** – If IAAO cancels a program, the instructor will be notified as soon as possible.
- **Instructor** – Instructors unable to fulfill assignments shall immediately notify the Professional Development Department and the sponsor, if applicable.
- **Coordinator** – Coordinators must give notice of cancellation to IAAO and the instructor at least 14 calendar days prior to the scheduled start of the class. All cancellations must be in writing and sent to the Professional Development Department. The coordinators shall be liable for any airline cancellation fees the instructor incurs. After the deadline, the sponsor will assume total liability for all charges incurred by IAAO. Coordinators are responsible for returning any shipped materials to IAAO at their own expense.

# HONORARIA

IAAO shall pay its instructors an honorarium negotiated by the PDD using the Instructor Honoraria as a guide. IAAO does not reimburse expenses for instructors. All personal expenses (travel, hotel, meals, etc.) must be paid by the instructor. Instructors are free to negotiate compensation with coordinators with whom they work. This information is now contained in a Section 4 document and is available upon request from the Professional Development Department and in the Instructor Certification Program located in [learn.iaao.org](http://learn.iaao.org).

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## COURSE AUDITING

There will be no charge for instructors to audit a course they have already taken or challenged and passed. No continuing education credit will be allowed for auditing a course. Permission to audit courses must be obtained from the course coordinator. For instructors wishing to audit a course, they must contact both the coordinator and the Professional Development Department. The instructor auditing the course is responsible for their own course material.

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## PROFESSIONAL CONDUCT

IAAO instructors should always exhibit the highest standard of personal and professional demeanor. The Education Committee has adopted the following guidelines for instructors.

1. During a teaching assignment, instructors must conduct themselves with integrity and maintain an appropriate professional relationship with students, both in and outside the classroom. Instructors shall not say or do anything that reflects unfavorably on IAAO or any other organization.
2. **It is the policy of IAAO to promote a positive learning environment for all students. Instructors are prohibited by law from discriminating based on race, religion, color, sex (including pregnancy, gender identity and sexual orientation), ancestry, age, national origin, political affiliation, parental status, disability, genetic information (as defined in the Genetic Information Nondiscrimination Act), military service, or other categories protected by federal, state, or local law. Instructors are obligated to refrain from such behavior and are required to discourage such behavior from occurring in the classroom by others.**
3. While in the classroom, only material relevant and appropriate to the teaching of the course will be discussed.
4. Special sessions for review must be held only in a public classroom or a public meeting room.
5. Instructors shall not indicate or suggest answers to a final exam question or help students interpret questions on the exam. Instructors shall not attempt to grade the exam or predict the outcome of a student's exam and are not allowed to advocate for individual students or interfere with the grading of the exam in any way.
6. Instructors are prohibited from discussing candidates for public office, political parties, or IAAO internal political activities in the classroom. Instructors may not advocate for any vendor, product, or services in the classroom.

# EXAMINATIONS

## EXAM EVALUATION PACKET (EEP) FOR IN-PERSON CLASSES

### Contents

The material in the EEP includes the following:

- Examination security form
- Student attendance sheets
- Final examination booklets
- Education record scanner forms
- Logistical report/instructor comment form
- Uniform request for recertification forms

### Instructions

The coordinator shall give the Exam Evaluation Packet (EEP) to the instructor before the beginning of class. If it is a virtual course, the exam will be administered by the Professional Development Department using an electronic proctoring service and no materials will be sent.

The EEP is sealed with security labels. Upon receipt of the EEP, the instructor should check to see that the labels are intact. If the label has been tampered with, the instructor should immediately check the examination packet inside. If it appears that the examinations have been tampered with, the instructor should immediately call the Professional Development Department. Instructors shall count the examinations and note the number on the examination security form.

The instructor is responsible for maintaining possession of the EEP and ensuring that it is properly returned to IAAO. The instructor may not delegate this responsibility to the coordinator or any other person. All exams must be returned to IAAO headquarters. A return box is included in the EEP for the return of the exam materials at the end of the class.

### Examination Security Forms

To ensure accurate accounting of all IAAO examinations all sections of this form must be completed. **There are three sections to this form:**

- The top section of the form is completed at IAAO. It indicates the course date and location, course number, course name and instructor.
- The number of exams should be counted and noted by the instructor on the security form. The instructor should then sign the form.
- The bottom section is completed by the instructor after the final examination session and placed on top of the examinations in the box. The instructor shall note the following:
  - The examination starting time and date
  - The time the last student completes the examination
  - The number of examinations returned (If this number does not equal the number originally received, a written explanation must be included with the packet)
  - The number of students taking the examination, the number of students who did not take the exam, and the total number of students in the program.

## Returning the Exam Evaluation Packet

After the exam, the instructor must make sure that all examination booklets and scanner forms have been returned.

**The material returned to IAAO in the EEP must include:**

- All completed and unused scanner forms. (Place in plastic folder, when provided, or rubber band all exam scanner forms between two pieces of cardboard.)
- All used and unused exam booklets
- Examination security form signed by the instructor
- Instructor logistical problem/instructor comment form signed by the instructor (“pink sheet”).
- Attendance sheets

*Note: Any leftover solution pages should be returned to IAAO.*

The EEP will contain a return shipping box and shipping label. The instructor should mail the EEP from the course location and not carry it home. The instructor should ensure that the EEP is properly shipped to IAAO and should not relegate this responsibility to the local coordinator or sponsor. For faster results and if facilities exist, instructors should scan students answer sheets, along with attendance sheets and email them to [courses@iaao.org](mailto:courses@iaao.org) for expedited processing of student results. All exams answer sheets, booklets and scratch paper must then be mailed back to IAAO in the box provided.

The option of a virtually proctored exam is available for all IAAO courses and workshops in which an exam is offered, and the coordinator can discuss this option with the Professional Development Department.

## SPECIAL EXAMINATIONS

There are two types of special examinations: challenge and re-examination exams. An application can be found on the IAAO website.

### Challenge

- Applicants may take an examination without taking or completing the course or workshop. Should the student fail the exam and wish to attempt it again, they must take the course and the subsequent exam. Successful completion of the challenge examination does not earn credit for recertification hours.

### Re-examination

Any student who fails an examination has one year in which to take a re-examination. If the re-examination is failed, the course must be retaken. A link to the special exam application is included in the results email.

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## ELECTRONIC PROCTORING

The Professional Development Department uses an electronic proctoring service for all virtual course exams. Students will receive instructions from the Professional Development Department regarding exam block date(s), permitted resources (i.e., calculator, blank paper, formulas), and technical requirements to use electronic proctoring software. Instructors and coordinators will be included in all communication to students regarding electronic proctoring.

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## FINAL EXAMINATIONS

The instructor or other authorized proctor administers the final examination and shall not delegate this responsibility to any unauthorized individual. The instructor or proctor shall not retain a copy of the examination.

Final examinations may not be duplicated for any reason. The instructor ensures that all used and unused examination booklets, scratch paper, and education record forms are turned in to the Professional Development Department.

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## REQUESTS FOR MANUAL GRADING

Students may request a manual re-grade of an examination for a processing fee.

## **RULES FOR IN-PERSON EXAM PROCTORING**

1. The proctor shall not hold any review session utilizing an IAAO examination or referring to any questions in the examination.
2. Under no circumstances may an examination be duplicated.
3. During the examination, the proctor is not to prompt students in any way. The proctor may not give explanations regarding questions on an examination.
4. Cell phone use by a student is prohibited during a final exam.
5. The proctor must not advise a student to skip a question. If the proctor doubts the validity or clarity of a question, comments can be directed to the Professional Development Department, but the proctor is not authorized to advise students to disregard any part of an examination.
6. No student is allowed to use any reference materials, notes, or books while taking an examination. Students may not have books or briefcases on or around their desks during a final examination session. All calculations of problems should be done in the examination booklet or on the two pieces of blank scratch paper allowed per student. Any student bringing books or briefcases to the examination session must leave them in the front of the class, in clear view of the proctor before being issued a final examination.
7. Students may use non-programmable calculators.
8. Students leaving the room during an examination session for any reason must bring both the examination and answer sheet to the proctor. Proctors should announce this procedure to all students at the beginning of the examination session.
9. There should be no conversation between students during the examination session. Students should be warned that covert use of books or other study materials will be construed as cheating. Proctors are authorized to inform offending students that their examinations cannot continue and will be considered void by IAAO. Proctors are to attach an explanation of the specific offenses to the student's examination before returning it to IAAO.
10. Most students complete IAAO examinations in one to three hours, depending on the course. An examination time limit of three hours shall be in effect for all 30-hour IAAO courses. An examination time limit of 2 1/2 hours shall be in effect for all IAAO workshops, except Workshop 151 – National USPAP which shall have a time limit of one hour. IAAO two-part exams will have a maximum time limit of seven hours with a one-hour break between exams.
11. The proctor should not leave the room at any time during the examination session.
12. The proctor must collect all examinations distributed to students and none may be retained by either the student or the proctor. If a student does not complete an examination, it still must be turned in to the proctor. Proctors should ensure that all answer sheets and scratch paper are turned in by students are accompanied by an examination booklet. An answer sheet turned in without the examination booklet will be considered void.

## EXAMINATION PROCESSING

Upon receipt of the EEP at IAAO, examination processing will begin (unless the instructor has emailed the scanned answer sheets to IAAO at [courses@iaao.org](mailto:courses@iaao.org) prior to mailing). Depending upon the number of courses being offered at that time, examination processing turn-around times may vary. Professional Development Department staff strive to provide results to students no longer than two weeks after the EEP is received.

Typically, results are sent to the participants via the email address provided within one to two weeks after the program. Instructors should not guarantee a specific date or encourage students to call IAAO to find out their score. Professional Development Department policy is not to release scores when requests are made by students over the phone.

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## CERTIFICATES: ACHIEVEMENT AND ATTENDANCE

Seventy percent is the minimum passing score on all exams except for Workshop 151 – National USPAP (2020-2021), which is 74% although only pass/fail is communicated to students as part of a directive by The Appraisal Foundation. Students who have successfully completed a course will receive a certificate of achievement and their percentage score. Students who fail a course will receive their percentage score and a certificate of attendance if they have met the full attendance policy. Students that do not take the examination for a course will receive a certificate of attendance if they have met the full attendance policy.

A link to the special exam application is included in the results email for students who wish to retake the exam.

Students who have successfully completed a workshop with an examination will receive a certificate of achievement and their percentage score. Students failing or not taking the examination will receive a certificate of attendance. For Workshop 151- National USPAP, results will not include a grade report, as The Appraisal Foundation directives are to provide pass/fail results only. Full attendance is required to receive a certificate of achievement.

All students completing a workshop with no associated exam will receive a certificate of attendance if they have met the full attendance policy.

Course and workshop achievement certificates will be personalized with the student's name, course name, number of hours, and date the course was offered. The student's name will appear exactly as it was entered on the answer sheet. Hardcopy certificates are provided upon request and are complimentary if requested within six months of the course date.

# STUDENT INFORMATION

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## POLICY STATEMENT ON CHEATING

IAAO seeks to support and promote qualities of academic honesty and personal integrity in all aspects of promoting innovation and excellence in property appraisal, assessment administration, and property tax policy through professional development, education, research, and technical assistance. IAAO instructors and proctors are authorized to promote and ensure qualities of academic honesty and personal integrity when in the performance of their duty.

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## ACADEMIC DISHONESTY DEFINED

Serious offenses against the IAAO learning community include cheating, plagiarism, and all forms of academic dishonesty. Cheating or academic dishonesty is defined as the deception of others about one's own work or about the work of another. **Examples of cheating include, but are not limited to:**

- Submitting another's work as one's own or allowing another to submit one's work as though it were his or hers.
- Several people completing an assignment and turning in multiple copies, all represented either implicitly or explicitly as individual work.
- Failure to properly acknowledge authorities quoted, cited, or consulted in the preparation of written work (plagiarism).
- The use of a textbook, notes, cell phones, or other electronic devices during an examination without permission of the instructor.
- Copying from another student when taking an exam.
- The receiving or giving of unauthorized help on assignments without the expressed permission of the instructor.
- Stealing a problem solution from an instructor.
- Tampering with experimental data to obtain 'desired' results or creating results for experiments not done ("dry labbing").
- Tampering with or destroying the work of others.
- Submitting substantial portions of the same academic work for credit more than once without permission of the present instructor.
- Lying about these or other academic matters.
- Falsifying records, forms, or other documents.
- Unauthorized access of computer systems or files.

## DISHONESTY ON VIRTUAL TESTING

IAAO uses an online proctoring service for use with virtual testing. All students are required to identify themselves, their workspace, and authorized resources (including non-programmable calculator, blank paper for working problems, writing utensils, formula page). The proctoring service records all parts of the exam and identifies any anomalies that occur during the test-taking period. The Professional Development Department receives reports on each test and will disqualify testers for using non-authorized materials, failure to show workspace, getting outside assistance on exam, leaving the test-taking space, and other obvious efforts to deceive. Disqualified students may be allowed to retake an exam by paying the full re-take fee. In the case where there is an attempt to steal IAAO materials through any means including copying, whether paper or electronic, the individual in question will lose all exam-taking privileges through IAAO and may be subject to fine and/or imprisonment as defined by law. All IAAO materials, including exams are copyrighted.

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## PREVENTATIVE ACTIONS AND CONSEQUENCES

Students/candidates who are guilty of academic integrity violations such as these can expect to be penalized. Any person who knowingly assists another student/candidate in dishonest behavior is equally responsible and is subject to the same consequences as both would be characterized as an offending student/candidate.

### First level of action

To minimize the opportunities for students/candidates to cheat during an examination, instructors/proctors are authorized to:

1. Collect (set aside) all cell phones, textbooks, class notes, etc.
2. Move students/candidates several feet apart from each other (if classroom space allows)
3. Ask students/candidates to move to another seat during the exam if cheating is suspected
4. Issue a verbal warning to the student(s) addressing the inappropriate behavior or action

### Second level of action

When cheating is suspected, instructors/proctors are authorized and expected to inform an offending student that their suspect behavior cannot continue, and their examination may be considered void by IAAO. The student/candidate may be required to retake an exam on which they were suspected to have cheated.

If inappropriate behavior or action persists, the instructor/proctor will notify the student of the instructor/proctor's intent to file a report of suspected academic dishonesty.

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## REPORT OF SUSPECTED ACADEMIC DISHONESTY

Instructors/proctors are required to attach an explanation of the specific offenses to the student's assignment or examination before returning it to IAAO. The report will contain the instructor's or proctor's name, course name, or case study name, examination date, location, coordinator's name, student's name, a complete report of the suspected academic dishonesty, and all actions taken by the instructor/proctor.

A copy of the report will be issued to the Director of Professional Development, the appropriate IAAO committee (typically, the Education Committee or the Professional Development Committee), and the student. In the case of a course examination, a general notice, with student name(s) redacted, will be issued to the course coordinator.

**The instructor/proctor shall have the authority to deal with instances of academic dishonesty in a variety of ways including, but not limited to, recommending to IAAO the following courses of action:**

- Work may be redone for full or partial credit
- Alternate assignments may be given for full or partial credit
- Work may not be redone, and no credit will be given for that assignment
- The student may be dropped from the course

If a second documented report of an academic integrity incident has been upheld by the Board of Directors for any person in an IAAO course, workshop, or designation program, the person will be ineligible for participation in the IAAO designation program (if applicable).

Any student found to be academically dishonest as defined in this policy has the right to appeal through the regular channels as established by the appeals process.

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## **APPEALS PROCESS**

**The appeals process shall proceed as follows:**

1. Notice is issued to the student of alleged academic dishonesty with an opportunity for the student to respond.
2. The Education Committee Chair shall appoint an appeals committee consisting of the Chair or the Chair's designee and two senior instructors. The appeals committee will review the report of suspected academic dishonesty and any response from the student. The appeals will be processed by the Professional Development Committee with responsibility for the designation, or the Education Committee for a course examination.
3. Should the student wish to pursue it, the findings of the Committee may be appealed to a panel comprised of the Chair of the Professional Development Committee, the Chair of the Education Committee, the Director of Professional Development, a senior instructor, and a designated member of IAAO.
4. An appeal of this group may be made to the Board of Directors. Their decision is final.

## **COMMITTEE RECORDS**

All documents mentioned in this manual can be obtained from the Professional Development Department.

# GLOSSARY

**A/V** – audio/visual. Refers to audio/visual equipment that may be required by the instructor to teach the course, such as video projector, computer, etc.

**Activity number** – internal number used by IAAO Staff to identify specific course offerings. This number is used in the classroom on student answer sheets and to complete the instructor survey.

**Apendium** – the book title of IAAO's Body of Knowledge.

**AQB** – Appraisal Qualifications Board. Part of The Appraisal Foundation (TAF), the Appraiser Qualifications Board (AQB) establishes criteria for educational offerings and determines if they are approved for continuing or qualifying education.

**Associate member** – category of membership in IAAO, available to individuals who do not have any duties directly related to property valuation, those who are employed or enrolled in educational institutions, or those who are interested in property valuation or property tax administration and policy.

**Body of Knowledge (BOK)** – a collection (eight books) of the expertise required to effectively work in the assessment profession that also serves as the framework for future publications and educational offerings.

**Certified (course)** – A category of educational offering in which the sponsoring agency is responsible for securing the instructor and is responsible for all expenses and honoraria incurred by and for the instructor. The instructor must be IAAO approved. Sponsoring agency handles all registration and arranges classroom facilities. IAAO ships all materials and requested texts.

**Contract (course)** – A category of educational offering in which IAAO assigns one qualified instructor for the class and pays a flat fee. Sponsoring agency handles all registration and arranges classroom facilities. IAAO ships all materials and requested texts. There is a minimum class size of 25 students.

**Coordinator** – the individual representing the organization sponsoring an IAAO educational offering. This individual will act as the point of contact for IAAO Staff for ordering of course materials. They may also handle student registration and collection of fees, instructor selection for certified courses, and manage classroom needs (i.e., securing a space or virtual classroom, and any A/V needs).

**E SER number** – Exam Series number. An internal number used by IAAO Staff to determine the version of an exam that students receive and to ensure the proper answer key is used when grading. The E SER number should be included on answer sheets and should match the E SER number from the exam booklet.

**EEP** – Exam/Evaluation Packet. The box of contents provided to instructors for in-person courses that includes exams and answer sheets, instructions for completing answer sheets and student evaluations, and attendance sheets.

**Fair & Equitable** – IAAO's member publication, published digitally. Each issue features articles on special topics, local, regional, and international activities, and information on IAAO-sponsored programs.

**Honoraria/honorarium** – the fee an instructor receives for teaching an IAAO Course, Workshop, or One Day Forum or other IAAO offering.

**IAAO ID** – a unique identifier for each student participating in an IAAO educational offering. This number may be tied to IAAO Membership, but **anyone** who has participated in an IAAO educational offering has an IAAO ID.

**ICP** – Instructor Certification Program. Current IAAO instructors are required to complete requirements to maintain their status, including continuing education, maintaining IAAO membership and designation (if applicable), and ensuring documentation is up to date. More information can be found on our education website, <http://learn.iaao.org>

**IEW** – Instructor Evaluation Workshop. An intensive three-day workshop where qualified individuals audition to become an IAAO instructor. Events for qualification to teach either live-online or in-person are held at least annually.

**IRC** – Instructor Resource Center. A repository of articles, podcasts, videos, and other resources to help instructors to better teach adult learners.

**Learning needs analysis** – The first of five phases in the ADDIE (Analysis, Design, Development, Implementation, and Evaluation) instructional systems design model. The needs analysis is “the process of gathering data to identify specific needs—the who, what, where, when, and why of the [learning] design process.” (Association for Talent Development Glossary Terms, 2023)

**LMS** – Learning Management System. An online platform for delivering education and other learning resources. IAAO’s LMS is called *Learn* and can be accessed at <http://learn.iaao.org>

**PDD** – Professional Development Department. One of IAAO’s staff departments, part of the Professional Development pillar as part of the Strategic Plan and responsible for IAAO education and credentialing opportunities.

**Pilot class** – A class held to test drafted learning content for its intended audience in its intended setting. Pilot classes enable the learning design team to gather actionable insights and feedback from students and stakeholders while the course is being developed.

**Proctor** – the individual responsible for maintaining academic integrity during an IAAO exam. This may be an individual who meets the qualifications to be an IAAO Proctor, or an employee of a virtual proctoring service selected by IAAO.

**RFP** – Request for Proposal. This document announces a project, describes it, and may solicit bids from qualified contractors to conduct work. IAAO’s Education Committee and Professional Development Department utilize RFPs during the beginning phase of a proposed curriculum addition.

**Sponsor** – the organization or agency hosting an IAAO educational offering. Typically, the coordinator acts on behalf of the sponsor.

**SRM** – Student Reference Manual. A document to accompany the instructor presentation that may include readings, discussion questions, practice exercises, and quizzes, designed to aid in understanding and application of course concepts. Each student participating in an IAAO Course, Workshop, or One Day Forum will receive a copy of the SRM for the offering.

**TAF** – The Appraisal Foundation. An organization that sets the Congressionally authorized standards for real estate and personal property appraisers. The goal of TAF is to ensure that “appraisals are independent, consistent, and objective.” IAAO is a Sponsoring Organization of the Foundation. ([https://www.appraisalfoundation.org/imis/TAF/About\\_Us/TAF/About\\_Us.aspx](https://www.appraisalfoundation.org/imis/TAF/About_Us/TAF/About_Us.aspx))

**USPAP** – *Uniform Standards of Professional Appraisal Practice*. The generally accepted standards for appraisal in the United States.

# ABOUT IAAO

The International Association of Assessing Officers, formerly the National Association of Assessing Officers, was founded for the purpose of establishing standards for assessment personnel. IAAO is a professional membership organization of government assessment officials and others interested in the administration of the property tax. Over the years IAAO members have developed assessment practice and administration standards and many of these standards have been adopted by state and international oversight agencies, and some have been incorporated into legislation.

IAAO continues at the forefront of assessment in North America and has been expanding its reach to the global community for the last five decades. Because standards form the rules by which North American assessors perform their duties, they may not be directly applicable to an overseas audience. The standards have been updated to also present the broad principles upon which the rules are based. IAAO believes those principles may be adapted to many differing statutory and regulatory scenarios worldwide.