



POWERED BY

California Community Colleges

Unit 7 – Teaming with the Right Instructors

Contents

- Know the qualities required of a good Contract Education instructor
- Understand the purpose and contents of an instructor handbook
- Use instructor recruitment best practices to increase your instructor pool and understand the importance of building instructor loyalty

The Importance of Good Instructors

One of the most important aspects of your Contract Education program is the relationship between you and your instructors (presenters, teachers, consultants), over the long term.

Your clients will assess the image and credibility of your Contract Education program based on their reaction to the instructors. You may have state-of-the-art promotional material, client-driven needs assessment strategies, excellent facilities, professional handouts, and the latest technology, but real success in contract education depends upon an instructor's ability to meet the expectations of the participants in the classroom.

A good instructor:

- Manifests confidence, but not arrogance, in his or her own ability;
- Quickly creates relationships based on mutual respect and trust with clients;
- Is not always too tightly bound by schedules but can find time to train on demand;
- Exhibits high levels of creativity and energy;
- Is an excellent listener and has the capability to ask probing questions of learners;
- Is results-oriented but exhibits good process on the way to results;
- Is clear and precise in his or her communication;
- Takes care to keep you abreast of new developments in your mutual projects;

- Has the capacity to work diplomatically with all levels of staff;
- Can demonstrate that he or she “knows the stuff” and works to stay current in the field; and
- Is careful with materials and physical resources.

Working with independent contractors can be a challenge. You’ll have to do considerable work up-front to be sure they understand the culture of your Contract Education program and how you want things done. But the reward for your investment of time is long-term, win-win relationships with instructors who teach, scout out opportunities on your behalf, and work well with your staff.

Keys to good relationships

Some of the key things you can do to foster good relationships include:

- Develop an instructor’s handbook;
- Define explicitly how you want your part-time instructors to represent you and your Contract Education program;
- Establish and communicate quality expectation for handout materials;
- Establish a policy for handling follow-on leads from clients;
- Conduct a well-structured initial interview;
- Think in terms of a long-term relationship; and
- Facilitate the meeting with your client and instructor.

Develop an Instructor Handbook

Communication is the key to developing a relationship that works for both you and your instructors. Put your expectations in writing so you can avoid misunderstandings. Make the book thin, simple, and clear.

The instructor handbook should clearly indicate your expectations regarding payment, curriculum development, leads generated, and other issues that have had to be addressed with individual instructors over the years. Some topics to cover include:

- How the instructor should handle follow-on leads generated as a result of delivering a training or service for your Contract Education program;
- Your expectations for the quality of the handout materials; and
- The standard payment schedule.

Define how you want your part-time instructors to represent you and your Contract Education program

Express up-front how you want your Contract Education program represented by your instructors. In the initial “hiring” interview, state your expectations clearly and ask if the instructor is willing to meet or exceed those expectations. If he has initial questions or concerns about meeting your minimum requirements or is hesitant to accept your pay scale, save yourself a lot of time and frustration and don’t pursue the professional relationship.

Establish and communicate quality expectations for handout materials

Handout materials can be an excellent marketing tool for your Contract Education program. Review all participant materials before they are copied and distributed to the participants in any workshop.

Make sure that your Contract Education program is clearly visible as the provider of the training. Instructors can identify their expertise and company name in the biography section of the handout but should not have the name of their company printed on each page. When clients pick up a copy of the handout, they should know immediately that your Contract Education program is the provider.

Show instructors a sample of the standard of quality you expect in your handouts. Let them take a sample copy.

Establish a policy for handling follow-on leads

Leads you gain as a result of your instructor’s interaction with your client or client’s employees should be turned in to you for follow-up.

Get a signed statement from your instructors indicating they understand the process of referring leads that come to them as a direct result of training programs they conduct for your Contract Education program. Prevent awkward situations for your instructors by providing them with a few of your business cards so clients will call you, not them, when they need help.

The following is a sample instructor agreement form.

Contract Training Instructor Agreement — Short Form

This Agreement is made between (The name of your institution), at (your address here) and (the name, title, and business name of the consultant or teacher) with a principal place of business at (list address).

Insert Title, Date, Time and Place for the Instructional Event

Insert Compensation Amount, and Date

Expenses

We will reimburse you for the following expenses (list them here):

-
-
-

You must submit receipts to (Insert name and how long in advance receipts must be turned in. Tell whether the reimbursement will be included in the instructor's regular paycheck or in a different check)

Materials

(Insert the name of your institution here) will furnish all materials, tools and equipment used to provide the services required by this Agreement, provided you submit a form requesting them fourteen days in advance of the class date listed above. This form should be (faxed, mailed, etc.) to (Name of person and address).

Your Status with Us

You and (Insert the name of your institution here) agree to the following rights consistent with a contract trainer's relationship with us:

- You have the right to perform services for others during the term of this Agreement, provided they are not a client of ours.
- You have no obligation to perform any services other than the training described here, but are expected to work as a professional team member with all Institution employees in the design and delivery of this training. You are expected to answer follow-up client calls for xxx days.
- You
 - must pass on leads for further training or consulting to (Insert the name here).
 - are required to attend meetings organized by (Insert the name of your institution here.)
 - do have to obtain (Insert the name of your institution here.)'s pre-approval for changes in our contractual agreements with the client.

Confidentiality

You will not disclose or use, either during or after the term of this Agreement, any proprietary or confidential information of (Insert the name of your institution here) or its clients) our prior written permission except to the extent necessary to perform services on our behalf.

Notices

All notices and other communications in connection with this agreement should be made in writing and directed to (Insert the name and contact person of your institution here.)

Signatures

By: _____ (Institutional representative)

_____ (Signature line)

(Insert the name of your institution here.)

Date: _____

By: _____ (Typed or printed name of instructor)

_____ (Signature line)

Date: _____

Taxpayer ID Number: _____

Hiring Instructors

Following a simple interview process will help you make the process of hiring instructors easy and efficient.

Steps for the hiring process

Your interview process should include the following steps that anyone, regardless of the trainer's qualifications, should follow:

Step 1: Request a cover letter and current resume. The cover letter should indicate all areas of expertise as well as preferred teaching topics.

Step 2: Set up the interview – if the letter and resume pass muster.

Step 3. Conduct the interview. Cover special points of interest including:

- Your vision, mission, and operational philosophy;
- Payment schedule;

- Handling leads generated by your promotional materials or training programs;
- Soliciting personal business;
- Curriculum development and copyright; and
- Handout format requirements.

Step 4. Conduct a simulated teaching presentation. Don't hire anyone until you have personally seen him successfully deliver a training session. Observe the individual in an actual teaching situation. You cannot always tell by visiting one-on-one whether a teacher will be able to effectively facilitate group discussion. You can visit a teaching session, see a video, or have the person demonstrate teaching skills in a simulated teaching session.

Step 5. Share your handbook. Give potential instructors a copy of your handbook. Ask them to read it and sign a statement indicating they agree to abide by the terms indicated. Their agreeing to do so indicates they understand your expectations and are willing to comply with the terms specified.

Paying Instructors

Pay instructors what they're worth and what your program can support. Instructor reimbursement represents a major portion of most Contract Education program budgets. Keeping this expense under control and in line with your budget is an important way to ensure your program's fiscal success. If you want to keep your production costs at less than 50 percent, then you cannot pay the instructor more than 50 percent of the contract price.

Remember that instructors in Contract Education may expect to earn more than instructors in other areas of your institution. You should be familiar with the local rates for instruction in each of the areas you offer and should price your contract at a rate that covers reasonable, fair wages for the instructors. At these rates, you should expect that instructors are full-team players in finding leads and passing them off to you.

Clear Contracts Protect Everyone

A clearly articulated contract is the precursor to a good working relationship. It can save you from making small mistakes (wrong contact person) to costly process errors (like poorly scoped work). A well-executed contract is simple and precise and it clarifies the assumptions of both parties by making them explicit.

Here's a checklist for creating effective contracts. Use all the points that apply to a particular training. When you're not sure if a point applies, ask yourself to defend why is *shouldn't*, not why it should. Better safe than sorry.

- Make critical assumptions explicit.
- Detail the scope of the work.
- Have a timeline.
- Describe staffing.
- Define milestones and checkpoints on longer projects.
- Specify the final product or outcome.
- Define terms of ownership.
- Define client responsibilities.
- Define project contingencies if success depends upon them.
- State conditions for changing the scope of the work.
- State the terms for cancellation or termination.
- State the terms of your guarantee.
- Articulate the payment schedule.

Unless the project warrants something else, stick with simple, concise, clear contracts. Look after both your interests and those of the client. Your goal should be that the client feels glad to sign it – not uneasy or with a sense of a higher-up or the corporate attorney should have been consulted.

Foster and Maintain Long-Term Relationships

Your relationship with your instructors is as important as that with your staff and your client. Realizing that importance and keeping in touch with your instructor cadre is one of the most important – and rewarding – components of your Contract Education program.

Once you hire an instructor, make it a priority to keep the lines of communication open with that person. Keep her informed as changes take place that affect her or may be of interest. Let her know of upcoming events so that she feels like a part of your Contract Education program. Reinforce the expectations stated in the handbook by maintaining a consistent management style as you work with her. It won't take long for her to develop a sense of your standards of quality. Set your standard and stick to it!

Provide feedback to your instructors on a regular basis. Written evaluations from the participants are helpful, but it is also important for you to observe them and

provide feedback as appropriate. Solicit input from your instructors regarding their perception of the training. Provide an “instructor’s evaluation” form in the trainer’s packet to give them an opportunity to express both positive and negative aspects of the training from their point of view.

Read class evaluations and share both positive and negative feedback with your instructors. Allow them the opt to evaluate the class and participants as well. Observe your instructors occasionally to see them in action. They will feel more a part of your program when you take the time to offer feedback personally.

Communication is the key to developing a partnership with your instructors. Expect your instructors to be prepared, on time, and enthusiastic in their delivery. If possible, be present at the beginning of each training to ensure the instructor has everything he needs. Also, an introduction by you or a member of your staff helps reinforce your role and provides an opportunity to promote future opportunities.

Develop Loyalty Around Follow-On Business

Instructor contracts should include a non-compete clause, and you could, technically speaking, follow through with litigation on one. But a preventive measure makes more sense than anything else in the case of instructor loyalty.

Look at the provider (instructor) and ask if he or she is someone you really want to work with. Taking business out from under you is a symptom of something that might be fundamentally undesirable in a long-term alliance with an instructor. People who steal your business are also likely to give you endless argument around issues of who owns the materials, content “turf” issues, and so on. The habit itself stems from a lack of understanding of the value of genuine collaboration.

One of the preventive measures you can take is to be sure the relationship is truly mutually beneficial. Here are some ways you can bring benefit to an instructor relationship:

- They don’t have to market. You sell, they teach. It takes a pile of work off their plates and allows them to focus on the tasks of being a content delivery expert, which should make them more competitive as providers of instruction.
- They get to continue to teach for you. In the long run, of course, if they take business which is yours, they will lose the connection with you, and so, the use of your contacts and facilities.

- They get more business because they ride on the coat tails of your reputation and your staff's efforts.
- This all assumes that you sell more than they do. It also assumes that they actually intended to have a long term relationship with you in the first place —that they didn't come to get an in with one of your big clients and then leave with them. This does happen, of course, but it's a rare case.

Here are some strategies you might consider to bolster instructor relationship:

- Offer instructors a percentage of income, in addition to pay, of any contract they land. Of course, this number has to fit into your ratios and still keep your price competitive enough to get the contract. I would explain this to the teacher so he or she can see how it works.
- Be very clear up front (in writing and in speech) about what to do when a client offers to work with them. (Clients will offer to go around you... it's just convenient sometimes.) Be clear with the clients before a contract begins that if they want to schedule more, they need to come to you.
- Then teach the instructor to echo that by saying to the client, "More training? Sure! Let me connect you with our director." Often a problem in this area points to a lack of specificity in communication about it. We assume they would pass a lead off to us.
- Create "perks" for instructors who do not only turn over things to you, but generate business assertively. Do you ever offer them your space (in non-productive times) inexpensively for their own work? Do you offer any clerical support? Do they get more flexible scheduling? Do they get first offer on good work? Do you write letters of reference and send them to training to help them keep their edge? An instructor is less likely to steal business if he or she thinks there's something valuable to be lost in doing so.
- Look from the client's perspective and ask why they would approach an instructor independently. How can you make it BETTER to go through you? You probably can't make it cheaper, so you have to lean on value-added activity.
- For your very best instructors, give away business in VERY clearly defined areas of non-competitive activity. Pass leads their way. Give them RFPs. Introduce them to opportunities that your connections provide. In short, make it too good to risk endangering the relationship.

If you use non-competitive clauses, can you enact them? Do you have, and do you want to spend time on solutions that involve litigation?

If you have a teacher who takes business, at least use the opportunity to learn how you can improve the process. Ask the instructor:

- If it's true they took your business.
- If so, why?
- Do they recall in their interview going over the instructor handbook. Show them a copy of where they signed off saying they would not walk away with your business.
- If there is something you could have done to prevent this.

Sample Policy for Handling Leads Generated in our Programs

Using this policy statement as a guideline, insert text into the body of letters of agreement or in your instructor handbook to clearly communicate to instructors that you expect that all leads generated as a result of their association with you will be given to the institution, not handled privately by the presenter.

I understand that the college wants me to direct all leads for follow-on business generated *during training and after* to (insert name and contact information of person to whom the leads should be directed.)

I agree to do so for the duration of (most institutions use a period of one year) from the date of this training.

When possible and appropriate, (the institution name here) will hold my interest in mind when awarding this work. (insert name of person to whom the leads should be directed) will let me know what has transpired with the lead so I can maintain a quality relationship with the client who requested our assistance.

I have been notified of this policy and agree to comply. I have been given a copy of this agreement, signed and dated by institutional representative and me, below.

Tips for Recruiting Instructors to Your Program

Ideas for recruiting instructors include:

- Calling local professional organizations;
- Contacting your local ATD (American Society for Talent Development);
- Contacting clients and asking for references;
- Asking past participants in training who they've had that you should be using; and
- Asking your best instructors who they know.

How to Find Curriculum Resources

There are many sources online from which you may buy prepared curriculum resources. This may reduce your profit, but it also may save time and money if you are paying someone to design them from scratch. Start by looking online.

An instructional designer is your best bet if you want fully customized materials and if you want to and can afford to own the materials outright. This person's training and experience should include how to build curriculum that is based upon the learning outcomes that your client values. You could work together in the state or institution to share resources if your ownership rights and fair use rights allow for that.

Many of your instructors can develop curricula outside of their area of expertise, by using a subject matter expert to provide the technical information required to build the class. They will know the basic sequences and tools required to learn and retain.

Network with other providers of training (you could use an association like LERN to help you find contacts) in other states or regions to find out what they use. Attend conferences and ask colleagues and peers.

Ask training departments inside client companies what their best resources for training materials are. Many companies do materials across diverse subject areas.

How to keep your materials up-to-date

Like any other maintenance task, keeping curriculum up-to-date should be scheduled. Your bread-and-butter curricula should be assessed every couple of years. Let instructors know well in advance when they need to check to see if the material is up-to-date and make modifications if it is not. Follow up will be key to keep those instructor updates on track.

You can also make one of the evaluation form points a question about whether the materials were up-to-date. participants who are advanced enough to recognize out-of-date materials will be happy to let you know.

If your instructors are not the best choice for participating in this aspect of teaching, you'll need a subject matter expert *who is active in the field* to know if materials are current. Instructors who teach full time are not always themselves up-to-date on new knowledge and industry requirements. You may need to hire an industry-savvy expert to help out.

It's even the case that materials you buy online may not be up-to-date, so be sure you have the ability to get a refund if they are not. Ask a subject matter expert to assess them for you.

Since it costs money to update materials, be sure to budget for this in your pricing of courses. The most profit is gleaned from courses that have a three-plus year shelf life so you can spread development and maintenance costs over those years. If a course is a customized, one-time offering, you'll need to charge more, since you have no other way to recoup the development cost.

Ownership

There is always discussion about who owns the curriculum developed by an instructor. Make it simple – if you pay for the curriculum development, you own it. There will be curriculum you will want to own and curriculum you will not want to own. Make it clear in your instructor agreement who owns the curriculum developed for the contract.

Summary

The key to success with instructors is to create win-win, long-term relationships and to keep in touch with what makes the relationship most exciting and rewarding for them. This requires frequent communication and clear expectation setting.