

**COUNTRY LIAISON PROGRAM**  
**SEPTEMBER 2008**

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# PROGRAM GUIDELINES

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Country Liaisons are CCIM designees who are appointed by the International Activities Committee to work with International Partner Organizations or other potential partners. Liaisons will strengthen ties with existing partners and explore new relationship opportunities for the Institute. The program appoints CCIM designees with strong country knowledge to serve as liaison to countries where the Institute has course delivery agreements.

## **Name**

The name of the program is the Country Liaison Program.

## **Key Groups, Individuals and Terminology**

Country Liaison: The US or Canadian CCIM designee who is selected by the International Activities Committee to fulfill the duties listed within this document.

International Partner Organization (IPO): The international organization is the entity the CCIM Institute has contracted with to deliver its courses.

Host Country: The home country of the International Partner Organization. Current host countries:

- China
- Japan
- Korea
- Mexico
- Poland
- Russia
- Taiwan

International Administrator: The primary contact at the International Partner Organization

## **Liaison Duties**

It might be unreasonable for a liaison to fulfill some of the duties listed here, especially since liaison-related work will be conducted during routine business travel. The duties listed here are intended to give an idea of the level of participation a liaison should have with the IPO. These are not mandatory duties. Using their expert knowledge of the Host Country, liaisons will recognize unique ways to make an impact the IPO's partnership with the CCIM Institute.

1. Term of service
  - a. Serve as a Liaison for two years.
  - b. Liaisons may be renamed for additional terms based on performance after review by IAC and availability of other qualified applicants.
2. Promote the benefits of CCIM membership and education.
3. Communicate international course delivery and content issues expressed by the IPOs with the International Activities Committee and the International Operations Advisory Board.
4. Make reasonable efforts to contact the individual CCIM members of the International Partner Organization. Make sure they are aware of CCIM benefits, policies and practices. Methods of direct contact could include, but are not limited to:
  - a. Article in IPO's member newsletter (translated, if necessary)
  - b. E-mail to association membership
  - c. Posting on association website
  - d. Presentation at membership meeting

5. Attend IPO's annual membership and/or education meeting and make a presentation about CCIM.
6. Encourage and motivate members and leadership of the International Partner Organization to attend the CCIM spring and fall meetings and conventions as well as other CCIM sponsored events.
7. Host members and leadership of the International Partner Organization during official CCIM functions and other visits to the United States.
8. Maintain regular communication with the international staff at the CCIM Institute. Keep them informed of pertinent International Partner Organization issues, plans and questions.
9. Stay informed of Institute policies that affect the host country and International Partner Organization. Communicate any changes in policy to IPO. Relay implementation problems or questions to appropriate Institute staff.
10. Use contacts, country knowledge, local experts and other resources to publish information on opportunities, trends, regulations and other topics of interest to US members who might be interested in expanding their business to the liaison's host country.
11. Understand the contract between the CCIM Institute and the IPO the liaison is assigned to.

### **Limitations**

Liaisons should look for ways to expand their effectiveness beyond the duties listed above. But there are certain things liaisons are not authorized to do:

- Liaisons' views, opinions and positions are not necessarily those of the Institute and should not be attributed to the Institute.
- Liaisons cannot sign contracts or make verbal or written agreements or commitments on behalf of the Institute.

### **Becoming a Country Liaison**

Any CCIM designee in good standing is eligible to become a country liaison. If a designee meets this preliminary qualification, the applicant will be evaluated on the following criteria:

#### **Required Qualifications**

1. US or Canadian CCIM designee in good standing

#### **Desired Qualifications**

1. Business experience in the host country.
2. Language proficiency in the host country's primary language.
3. Previous volunteer experience with the CCIM Institute

### **Reporting**

Liaisons are required to submit an Annual Report to the International Activities Committee at the Annual Business Meetings. Also, a Trip Report is required for program-related travel for which the liaison is requesting reimbursement. Please refer to the appendix for more information on the [Annual Report](#) and [Trip Report](#).

Liaisons are also encouraged to report general country information, emerging industry trends, pending and new legislation or other information that could be of interest to the CCIM Institute and its membership.

These information reports can be sent to the Institute's International department for consideration for *CIRE Magazine*, CCIM Podcasts, website postings, newsletters or other Institute communications.

Liaisons should also explore non-Institute media as a way to share their country expertise and strengthen the reputation of the Institute and the Liaison Program.

## **Conflict of Interest**

Liaisons are required to sign the [Conflict of Interest](#) form if they haven't signed it already for another volunteer role with the CCIM Institute.

## **Compensation**

Program related expenses are reimbursable up to \$2,000/annually. When a liaison's travel includes program-related activities, the liaison is required to submit an expense report and a [trip report](#).

# APPLICATION (APPENDIX I)

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First Name \_\_\_\_\_

Last Name \_\_\_\_\_

Company Name \_\_\_\_\_

Address 1 \_\_\_\_\_

Address 2 \_\_\_\_\_

City \_\_\_\_\_

State/Province, ZIP/Postal Code \_\_\_\_\_

Country \_\_\_\_\_

Phone Number \_\_\_\_\_

E-mail address \_\_\_\_\_

Foreign languages spoken and level of proficiency \_\_\_\_\_

Please check your requested host country

<input type="checkbox"/> China	<input type="checkbox"/> Russia	<input type="checkbox"/> Poland	<input type="checkbox"/> Japan
<input type="checkbox"/> Mexico	<input type="checkbox"/> Korea	<input type="checkbox"/> Taiwan	

On a separate page or on the following page, please address numbers 1 – 4:

1. What kind of business or non-business experience do you have in your requested host country?
2. What are your objectives as a liaison to this country?
3. Please describe your volunteer experience with the Institute.
4. Will your role as a liaison overlap with your professional practice? Please elaborate on why it will or will not.

# CONFLICT OF INTEREST DISCLOSURE STATEMENT (APPENDIX II)

As a volunteer, independent contractor, or employee of the CCIM Institute (the "Institute"), I acknowledge and hereby agree that I shall act in the best interest of the Institute at all times in which I am acting on behalf of the Institute. This includes avoiding conflicts and potential conflicts of interest where my loyalty to the Institute might be divided between my role as a volunteer, independent contractor, or employee of the Institute and another professional, business, volunteer, or personal activity or responsibility. To avoid such conflicts, I agree to promptly disclose situations where it may appear I have conflicting responsibilities to other entities or have a conflict of interest as defined in the CCIM Conflict of Interest Policy. I encourage the Institute to thoroughly review any aspect of potential conflicts that it deems appropriate. I will take all necessary steps (e.g., not serving on committees, withdrawing from my position in the Institute, etc.) if the Institute determines that such steps are necessary to eliminate the conflict and/or to protect against legal liability to the Institute or me arising from the conflict of interest, as may be determined by the board.

Listed below are the potential, current, or future conflicts of interest of which I am aware. Further, I agree to keep this form current by updating it annually as well as updating it whenever the information contained herein may become inaccurate.

1. The following professional, business, volunteer, or personal activities or responsibilities may give rise to a conflict of interest:  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
2. I am or have a professional, business, volunteer, or personal relationship with the following vendors or independent contractors with which the Institute does business:  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
3. The following personal relationships (e.g., spouse, relative, friend, etc.) may give rise to a conflict of interest:  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
4. I have received reportable income/compensation from the Institute and or related entities in the past (not including expense reimbursements) for services.  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**I have read the CCIM Institute Conflict of Interest Policy and hereby agree to adhere to the terms contained therein. Furthermore, I honestly to the best of my knowledge have accurately completed this Disclosure Statement. Other than as disclosed above, I know of no professional, business, volunteer, or personal activity or responsibility—including vendor relationships—that may give rise to a conflict of interest.**

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Signature

Date

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Name (please print)

CCIM Position

## **ANNUAL REPORT (APPENDIX III)**

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There is no set format for the liaison's annual report to the International Activities Committee at the Annual Business Meetings. The following ideas are meant to spur some thought on items to include in the report

1. How many times did you make contact with the IPO leadership over the past year?  
Members?
2. What seemed to be the most pressing operational issue concerning the IPO and the CCIM Institute?
3. What progress have you made last year in strengthening the ties between the IPO and the Institute?
4. Did you meet with representatives from other groups that are interested in holding CCIM courses?
5. What major developments occurred over the past year in the commercial real estate industry in your host country?
6. Did you attend any meetings, forums or events hosted by the IPO or other groups? If so, which ones? What important issues were discussed?
7. What are your goals as a liaison for the upcoming year?

# TRIP REPORT (APPENDIX IV)

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**Date of travel:** \_\_\_\_\_

**Location Visited:** \_\_\_\_\_

**Purpose/Scope of Work**

What is the reason for the visit and what do you hope to accomplish?

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**Activities on the trip**

Can be in bullet point form. In what activities did you participate? Please photocopy any business cards and include them in this report.

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**Results of the visit**

With regard to the Institute's Strategic plan and objectives, please list what you consider to be the most important accomplishments during your visit. What are the implications and benefits of this trip for the Institute? Other interesting items to note.

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**Action Items**

What do you or Institute staff need to do as follow-up to this visit?

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**Additional Information**

What are your observations during this trip with regard to real estate conditions and general economic conditions in this location?

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