



IAP2 Federation – Trainer Licensing Program 2017 Pilot Process and Steps

IAP2's Train-the-Trainer (T3) process provides a path for an individual to become certified as an IAP2 Licensed Trainer to deliver the *Foundations in Effective Public Participation* course. The overall process from recruiting applicants through licensing is outlined below. The process and steps provided in this document describe the 2017 Pilot Program, specifically. Changes made be made to the process and steps before full-scale implementation scheduled for 1 March 2018. Additional details are provided in the Trainer Candidate Handbook and Application Form and the T3 Instructor Manual and Application Form as well as on the [How to Become an IAP2 Trainer](#) webpage.

This document contains six sections as follows:

- Section 1, Overview of Process for Applicant to Become an IAP2 Foundations Licensed Trainer, provides a snapshot of the four-step process from application through evaluation and mentoring.
- Section 2, Recruitment of Trainer Candidates, describes the Trainer Candidate Handbook, the application process and requirements, the IAP2 point-of-contact for applicants, and application deadlines.
- Section 3, Selection of Trainer Candidates, describes how applications will be reviewed and candidates selected and notified, and the appeals process.
- Section 4, Candidate Training (Phase 1 of Licensing Process), describes the overarching methodology driving this training phase as well as the webinars and in-person classroom training. This section also discusses how applicants will be assessed after both the webinar and classroom training stages.
- Section 5, Trainer Performance Evaluation (Phase 2 of Licensing Process), describes how each candidate will be supported and evaluated during co-delivery of the Foundations course.
- Section 6, Follow-up Mentoring (Phase 3 of Licensing Process), summarizes the opportunity for one year of mentoring.

Section 1. Overview of Process for Applicant to become an IAP2 Foundations Licensed Trainer

To become an IAP2 Foundations Licensed Trainer, an individual must successfully complete an application and a three-phase training process:

- Application
 - Pay a non-refundable application fee (US \$500*).
 - Submit a complete Trainer Candidate Application Form.
- Phase 1 of T3 Licensing Process: Candidate Training
 - Pay a non-refundable fee (US \$1,750*) for the Candidate Training Phase.
 - Develop the knowledge and skills required to deliver the Foundations Program through successful completion of six online instructor-led webinars and a two-day in-person classroom applied practice session.
 - Pass evaluation criteria for both the online training and the classroom training.
- Phase 2 of T3 Licensing Process: Trainer Performance Evaluation
 - Pay a non-refundable fee (US \$1,500*) for the Trainer Performance Evaluation Phase.
 - Co-deliver the course with an experienced Foundations Licensed Trainer.
 - Pass evaluation criteria for required skills and knowledge.
- Phase 3 of T3 Licensing Process: Follow-up Mentoring
 - Pay a non-refundable fee (US \$500*) for the Follow-up Mentoring Phase.
 - Receive mentoring from a T3 Instructor for two complete course deliveries or up to one year.

* *Note:* All fees quotes will be discounted to 40% of the rates for applicants from Developing Countries as designated by the [United Nations Conference on Trade and Development](#) (UNCTAD).

Section 2. Recruitment of Trainer Candidates

The recruitment process consists of identifying individuals who qualify for trainer licensing and getting them to apply.

- a. **Trainer Candidate Handbook.** IAP2 recommends that individuals interested in applying first read the *IAP2 Trainer Licensing Program for Licensing Foundations Program Trainers: Trainer Candidate Handbook* in order to learn about the Program requirements and IAP2 expectations of Licensed Trainers. The Handbook describes:
 - Application and selection of Trainer Candidates;
 - Three-phase T3 process; and
 - Licensing, including fees, terms and conditions, and responsibilities.In addition, the Handbook includes a Self-Assessment exercise to encourage self-reflection and help potential applicants determine if they should pursue becoming an IAP2 Licensed Trainer.

- b. **Application Process.** Applicants must complete the Trainer Candidate Application Form, which identifies the minimum requirements:
 - A minimum of five years of experience in the field of public participation / community engagement / public consultation
 - Experience in presenting and explaining P2 concepts in at least one public setting, such as conference presentations, seminars, courses, lectures, or similar activities; and at least one private (one-on-one) setting, such as mentoring or coaching a colleague, student, or mentee.
 - Demonstration of the Core Competencies of a Public Participation Professional (CP3) as established by IAP2 USA or IAP2 Canada through a detailed description of at least three projects and attestation from independent sources.
 - Evidence of a deep interest and motivation in becoming an IAP2 Licensed Trainer.

Applicants also:

- Must be a current member of IAP2 in good standing.
- Must have completed the 5-day IAP2 *Foundations in Effective Public Participation* course (formerly the “Certificate” course).
- Confirm their ability to participate in a series of six approximately 2-hour instructor-led online webinars, and that they have access to the technology required to fully participate in the webinars and complete the assigned homework.
- Confirm that, after being licensed, they understand that they will have sole responsibility for marketing the IAP2 Foundations Program in their

geographical area/organization. Applicant agrees and understands that IAP2 is not responsible for marketing the course.

- c. **IAP2 Contact.** IAP2 will identify a contact person who applicants may contact for support if they have questions. For the 2017 Pilot, the point of contact is Cassandra Hemphill, the IAP2 Federation Professional Development Manager (pdm@iap2.org).
- d. **Application Deadlines.** Deadlines for application should be set for prescribed dates (e.g., February 28) to accommodate scheduling of events.

Section 3. Selection of Trainer Candidates

The process of selecting qualified Trainer Candidates involves a two-step process of reviewing applications against a set of objective criteria.

- a. **IAP2 Review of Applications.**
 - **Preliminary Review.** The Professional Development Manager (PDM) will conduct the first review of applications to ensure that they contain the required information. The PDM will:
 - Inform applicant by email within 3 business days of receipt that the application has been received.
 - If information is missing, inform applicant what information must still be supplied within 10 business days of receipt of application. Applicants will given 10 business days to remediate and resubmit their application.
 - Check applications against minimum criteria.
 - Forward applications that pass the minimum criteria to the Trainer Candidate Selection Panel with a recommendation clearly indicating if/how minimum requirements were or were not met.
 - **Selection Decision.** The Trainer Candidate Selection Panel will conduct a review of applications to ensure criteria have been fully met.
 - Criteria for Selection Panel Membership to include: Highly experienced IAP2 Trainers, T3 Instructors, while explicitly avoiding conflicts of interest; practitioners with the necessary assessment skills (e.g., trainers, educators, or frequent presenters).
 - Every effort will be made to ensure cross-cultural, international, and multi-lingual experience and capacity across the Selection Panel.
 - A designated member or members of the Trainer Candidate Selection Panel will conduct telephone interviews with applicants and attestors, as necessary, to clarify application data.

- **Informing Applicants of Results.** The PDM will inform all applicants of results within 62 days after close of applications as follows:
 - Successful applicants will be notified of results and specific next steps (Candidate Training Phase).
 - Unsuccessful applicants will be notified of results and specific reasons why criteria were not met and, if appropriate, what the applicant can do in terms of a development path to ensure success on future application. The PDM will also inform an unsuccessful applicant of the appeals process.

b. Appeals Process.

- An unsuccessful applicant must inform the PDM in writing within 10 business days of receiving the notice of results that they wish to appeal the decision and the basis for their appeal.
- The PDM will inform the Trainer Candidate Selection Panel, who will review the material to determine next steps. If the applicant presents a strong case, the Trainer Candidate Selection Panel may determine to collect additional information and conduct further interviews.

Section 4: Phase 1 of Licensing Process: Candidate Training

Candidate Training is the process of developing the candidate’s knowledge and skills needed to deliver the Foundations Program.

- a. Methodology.** IAP2 will place Trainer Candidates in cohorts of three to five and assign each cohort to one or more T3 Instructors. Assignment to cohorts will be made to ensure geographical alignment whenever possible.

T3 Instructors will:

- Deliver webinar training (six sessions, each approximately two hours in duration) and one classroom-style training designed as applied practice for candidates (two -8-hour days).
- Formally evaluate the Trainer Candidate at the end of the webinar training and again at the end of the classroom training.
- Provide guidance to Trainer Candidates in their cohort in the preparation of training assignments, and provide systematic feedback and coaching at the individual level to each member of the cohort throughout Phase 1.

It is envisioned that different T3 Instructors may deliver the webinars and the classroom training.

b. Webinars

- IAP2 will coordinate a schedule with the T3 Instructor and the cohort for the delivery of the six webinars listed below:
 - Orientation to Candidate Training
 - Engaging Adults Learners
 - “Planning for Effective Public Participation” course (two webinars)
 - “Techniques for Effective Public Participation” course
 - Developing Case Studies

These sessions will cover the knowledge component of the training (e.g., course content and design, including objectives and instructional strategies) and average 2.0 hours in duration. It is recommended that the six webinars take place on a bi-weekly (every two weeks) basis over a 12-week period.

- **Evaluation.** At the end of the webinar training, Trainer Candidates will be required to submit a set of assignments covering the work completed over the course of the webinars.

The objectives of the evaluation are to confirm a Trainer Candidate’s ability to:

- Identify and apply core content (i.e., critical knowledge points) of the Foundations Program.
- Personalize training delivery by creating personal examples for key learning points.
- Develop case studies to meet target group learning requirements and express depth and breadth of personal experience.

The rating of the overall evaluation will be on the following scale:

1. Unacceptable, does not meet IAP2 Trainer Criteria
2. Requires significant improvement to meet IAP2 Trainer Criteria
3. Acceptable but requires some improvement to meet IAP2 Trainer Criteria
4. Very good, meets IAP2 Trainer Criteria
5. Excellent, exceeds IAP2 Trainer Criteria

To advance to the classroom training component, Trainer Candidates must achieve at least a rating of “3.”

- Trainer Candidates who receive a rating of “1” or “2” will not be permitted to continue to the next phase.
- Trainer Candidates who receive a rating of “3” must complete additional assignments to address the improvements required, within a 6-month period. Before a Trainer Candidate can be advanced to classroom training, the T3 Instructor must review the completed assignments and determine that the work merits a “4” or “5.”

IAP2 will inform Trainer Candidates of evaluation results and provide a description of next steps within three weeks of receipt of submitted work.

c. Classroom Training

- The two-day classroom training provides Trainer Candidates with the opportunity to practice their delivery of at least two sections of the Foundations Program in front of their peers (i.e., cohort members) and the T3 Instructor, and obtain feedback on their performance.
 - If possible, classroom sessions will be organized in conjunction with Affiliate conferences so that Trainer Candidates and the T3 Instructor can save on travel costs.
- The intent of the classroom session is twofold: (1) to provide a safe environment to practice delivery of the course content, and (2) to provide Trainer Candidates with feedback on the skills and knowledge components that IAP2 considers critical before delivering to an actual audience of paying participants.
- **Evaluation.** The T3 Instructor will evaluate both deliveries given by the Trainer Candidate using the Observation Checklist provided in the T3 Instructor Manual. Based on the two performances, the T3 Instructor will use the results to provide an overall evaluation using the following scale:
 1. Unacceptable, does not meet IAP2 Trainer Criteria
 2. Requires significant improvement to meet IAP2 Trainer Criteria
 3. Acceptable but requires some improvement to meet IAP2 Trainer Criteria
 4. Very good, meets IAP2 Trainer Criteria
 5. Excellent, exceeds IAP2 Trainer Criteria

To advance to Phase 2 of the Licensing Program, Trainer Candidates must achieve at least a rating of “3.”

- Trainer Candidates who receive a rating of “1” or “2” will not be permitted to continue to the next phase.
- Trainer Candidates who receive a rating of “3” must complete additional assignments to address the improvements required, within a 6-month period. Before a Trainer Candidate can be advanced to classroom training, the T3 Instructor must review the completed assignments and determine that the work merits a “4” or “5.”

IAP2 will inform Trainer Candidates of evaluation results and provide a description of next steps within three weeks of the end of classroom training.

Section 5. Trainer Performance Evaluation (Phase 2 of Licensing Process)

Phase 2 involves the process of evaluating the Trainer Candidate's actual program delivery against the required demonstrated skills and knowledge (see Observation Checklist in T3 Instructor's Manual), and officially recognizing the candidate's ability to independently deliver the Foundations Program provided that the candidate meets specified criteria.

a. Co-delivery

The Trainer Candidate will complete two co-deliveries with an experienced Foundations Licensed Trainer (e.g., T3 Instructor or other Foundations Licensed Trainer) as circumstances permit, teaching a different half of the course each time, and observing the delivery of the other half of the training.

- **Delivery Support.** The T3 Instructor will provide support to the Trainer Candidates during the delivery of the Foundations Program as required to ensure Candidates are fully prepared to provide a quality experience for Foundations Program participants. This includes:
 - Coaching the Trainer Candidates to ensure that they (a) are prepared for their individual deliveries, (b) have planned the division of work and collaborated on the selection of sections to deliver, and (c) are able to provide a seamless delivery of the Program.
 - Monitoring the full delivery of the Program and providing input to the delivery as required (e.g., recommendations to the Trainer Candidates as to instructional strategies and content interpretation).
- **Evaluation.** A T3 Instructor will use the Observation Checklist to ensure standardized criteria are used in assessing the Trainer Candidate's performance. (The Observation Checklist is the same checklist used in the Applied Practice described in Step 4c, above.) When the T3 Instructor determines that the Trainer Candidate has adequately demonstrated the required skills and knowledge, the Instructor will complete the evaluation and approve the licensing.

The T3 Instructor will use the results to provide an overall evaluation using the following scale:

1. Unacceptable, does not meet IAP2 Trainer Criteria
2. Requires significant improvement to meet IAP2 Trainer Criteria
3. Acceptable but requires some improvement to meet IAP2 Trainer Criteria
4. Very good, meets IAP2 Trainer Criteria
5. Excellent, exceeds IAP2 Trainer Criteria

In order to be licensed, Trainer Candidates must achieve at least a rating of “3” in both deliveries.

- Trainer Candidates who receive a rating of “1” or “2” will not be permitted to continue.
- Trainer Candidates who receive a rating of “3” must complete additional assignments to address the improvements required, within a 6-month period. Before a Trainer Candidate can be advanced to classroom training, the T3 Instructor must review the completed assignments and determine that the work merits a “4” or “5.”

Section 6: Follow-up Mentoring (Phase 3 of Licensing Process)

The T3 Instructor will provide follow-up mentoring services for a two complete deliveries or 1 year to ensure an experienced trainer supports the newly certified Licensed Trainer during initial deliveries by providing advice and guidance (e.g., customizing content for different audiences).