
PROFESSIONAL STANDARDS POLICY

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| Title: | REVIEW SESSION AND PRESENTER/TRAINER ASSIGNMENT POLICY | | |
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| Written by: | M. Parry, R. Anderson | | |
| Approved by: | Board of Directors | Date of Approval: | 12/21/2015 |

Notes: New Review Session and Presenter/Trainer Assignment Policy and Procedures, including 2020 fees.

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Policy Statement

All general principles review presentations shall be setup and coordinated internally by EnviroCert (ECI).

All registration for review presentations shall be coordinated thru ECI. ECI will assign or approve Presenters/Trainers for all sponsored events

ECI will “partner” with individuals, groups, and other organizations that follow the policies and procedures established herein (PS6002.04-2020)

BACKGROUND

ECI seeks to provide high-quality, consistent review experiences for participants in its general principles review presentations. The scope of these experiences includes but is not limited to costs, registration procedures, course materials, and physical facilities as well as the presentation skills, certification-relevant experiences, and technical competence of presenters/trainers. Consolidating and clarifying the process provides consistent and uniform policies and procedures and a more positive experience for the presenters/trainers and attendees.

PURPOSE

This Policy was developed to ensure that general principles review course participants receive a high-quality review session experience. As well, this policy will provide a consistent and effective application of policy and procedures for setting up, establishing, and efficiently delivering review sessions across the US.

APPLICABILITY

This policy applies to all ECI-developed general principles review courses.

DEFINITIONS

Approved Presenter/Trainer: Any individual who is currently approved by ECI to present one or more of its general principles review courses.

General Principles Review Course: A certification-specific review course prepared by ECI whose primary purpose is to provide an overview of the job task analysis/scope of practice that ECI has established for the certification

Certification Exam: A series of questions designed to verify that approved applicants possess the technical and ethical knowledge required by each EnviroCert Professional Certification program. These exams are administered as an independent, closed book, timed event by others according to the ECI Proctor Policy and Procedures.

RESPONSIBILITIES

ECI Approved Presenters/Trainers

Presenters/Trainers are responsible for the following items:

- Remaining current on technical review matters
- Current with certification renewal
- Current with all agreements and fees
- Current with ECI policies and procedures

Executive Director

The EnviroCert Executive Director is responsible for the following items:

- Monitoring policy and procedure implementation by staff
- Providing annual summary reports regarding the status of the review courses to the EnviroCert Board
- Investigating and resolving presenter/trainer assignment issues
- Escalating issues to the Board as needed

ECI Staff

The EnviroCert Staff is responsible for the following items:

- Reviewing presentation session demands, setting up and coordinating all facets of regional and local presentation events
- Assigning presenters/trainers for specific sessions
- Initiate event marketing through the ECI website, social media, and other marketing efforts as noted in Section 1.5 below

- Coordinating with partnering groups, organizations, and individuals, which will include review, acceptance, and coordination for review sessions
- Monitoring the assignment of presenters/trainers for compliance with this policy
- Assisting the Executive Director with investigating and resolving presenter/trainer assignment issues
- Recommending changes to this policy to the Executive Director as identified

Professional Standards Committee

The Professional Standards Committee

- Reviewing this policy annually
- Coordinating with the ECI Program Technical Manager for Peer Reviews of all presenter/trainers
- Revising and updating as determined necessary
- Reporting to the Board any inconsistencies or failure by staff, organization, or others to follow this policy
- Conducting independent audits and reviews
- Preparing annual reports for the Board of Directors

Board of Directors

The Board of Directors shall ensure:

- Annual independent reporting by the Executive Director and the Professional Standards Committee
- Appropriate funding to ensure appropriate audits of policies and procedures and peer reviews are performed
- This policy and accompanying procedures are modified as necessary

History

ECI has previously permitted presenters/trainers, organizations, and businesses to independently conduct review sessions. This led to a large variation in attendee experience with the review events.

ECI has assumed all responsibility for the presentation events to provide a consistent and uniform set of procedures to make the process simple and straightforward for the presenters/trainers and applicants.

Updates

This policy should be reviewed annually by the Professional Standards Committee and revised as necessary.

Funds shall be allocated to allow for Peer Reviews by a designated member(s), per the Professional Standards Committee to assess policies and procedures. The Board will allocate funds and ensure that the Committee, or their appointed representative(s), perform(s) the necessary steps to ensure conformance with this policy and the application of the procedures by all parties.

The results of the policy review should be presented in a formal report to the Board of Directors independent of the Executive Director's report.

The Executive Director shall present a formal report to the Board of Directors annually. The report should include, but is not limited to, a discussion of current staff procedures, issues, problems, and positive undertakings.

Procedures

All presentation registration and coordination shall be performed and facilitated through ECI. ECI will arrange and coordinate review sessions, which will include selection of presenters/trainers, as established herein.

ECI may at its sole discretion enter into "partnering" agreements with approved presenters/trainers. These agreements provide a one-time license to conduct a general principles review course at a location, date and time mutually agreed upon under the terms of the Host Agreement and this Policy (PS6002).

ECI Review and Host agreements may be withdrawn or revoked by ECI at any time with or without cause. At the Board discretion, ECI may accept the other Host agreements in lieu of the EnviroCert agreement.

ECI will maintain a current list of all presenters/trainers and organizations that are approved to provide review sessions. That list shall be continuously updated by ECI.

This policy does not address or in any way influence presenter/trainer approval, which will be performed under a separate policy.

Presenters/Trainers, groups, or organizations are no longer permitted to set up or register applicants for review sessions.

Presenters/Trainers are encouraged to maintain a working knowledge of this policy and procedures, as well as any updates provided by ECI.

Any presenter/trainer, group, or organization found to be subverting this policy, in any manner, will be subject to disciplinary action as determined solely by the Board of Directors, which can range from verbal warnings to removal of their certification and corresponding privileges granted by ECI.

1.0. ECI Sponsored Events

ECI will identify locations, setup, and coordinate all review sessions.

1.1. Locations

ECI will establish review courses according to applicant requests, regional and local demands, and other factors.

ECI will work with local registrants and volunteers to identify and setup presentation facilities.

ECI will be responsible for room setup such as coordinating the layout for tables and chairs, A-V (audio-visual) equipment rental and setup, and other amenities as needed for the event.

Generally, unless there are special circumstances, the expenses will be limited to:

- Room rental
- Audio-visual rental

Rooms shall be at professional settings such as conference centers, colleges, community centers, offices, or hotel conference rooms.

ECI will ensure access to public restrooms.

ECI will assign presenters/trainers for the event based on the “Presenter/trainer Assignment Criteria” presented below.

1.2. Presenter/Trainer Assignment Criteria

ECI will only permit/license approved and current presenters/trainers (current Agreement and fees) to present and provide presentations for ECI certified general principles review courses.

ECI staff shall consider, but will not be limited to, the following criteria when making presenter/trainer assignments:

- Availability
- Travel costs
- Cooperation and professionalism
- Peer and student evaluations
- Complaint records

ECI is under no obligation to assign any one presenter/trainer or restrict re-using selected presenters/trainers as ECI deems necessary given various demands and requirements from applicants/clients.

Fees will be based on the current Presenter/Trainer Master Agreement, unless otherwise approved by ECI.

1.3. ECI Event Registration

ECI will coordinate and accept registration for proposed events. Fees will be established by ECI and posted on the ECI webpage.

All applicants and presenters/trainers should be aware that reviews will not be confirmed until 10 days before the event unless otherwise stated by ECI. Travel plans should be made accordingly.

At the 10-day milestone, ECI will email the respective presenters/trainers and attendees confirming the review and providing location details.

At 3 days prior to the confirmed event, the presenter/trainer will be provided a final event attendee list via email. The presenters/trainers shall contact the attendees via email with a brief introduction and any other information related to what they will need to bring to the event (manual, calculator, scratch paper, straight edge, drinks, snacks, potluck lunch items, etc.). Any changes or modifications to presentation logistics shall be approved by ECI and strictly coordinated by ECI, who will contact the attendees.

On the day of the event, the presenter/trainer shall have all attendees sign in using the standard "ECI Attendance Form" provided. The sign in form shall be provided to ECI directly after the event (scan and email or mail the original). No unregistered attendees will be permitted (except for ECI staff and ECI-approved personnel). Failure to adhere to this policy will be deemed a violation subject to discipline.

Each attendee will receive a presenter/trainer Survey and a Participation Certificate issued by ECI after the completion of the review.

1.4. Issuance of Payment for ECI Event

After receipt of the ECI Attendance Form and confirmation that all associated tasks have been properly completed (e.g. includes room was left in proper condition, no damages, etc.), the presenter/trainer shall provide a current W-9, fee invoice, and all original receipts for associated expenses. Once full documentation is completed, ECI will provide the presenter/trainer a final payment check.

1.5. ECI Event Marketing

ECI will assess, identify, and promote all ECI sponsored events. Promotion and

marketing may include, but is not limited to:

- a) social media
- b) web calendar
- c) email blast (conferences) at 90, 60, 30, and 15 days in advance (nation-wide and regional emails)
- d) conference advertising (requires Executive Director approval)
- e) emails or flyers to local organizations and stakeholders
- f) if possible, coordination with a local ECI representative
- g) emails and flyers to local City, County, State, Federal agencies, and private entities (as possible)

1.6. ECI Event Closeout

At the completion of the event, and before-mentioned tasks, ECI will perform the following:

- a) Follow up with location contacts to ensure there are no outstanding issues
- b) Compile attendee evaluations and forward to the presenter/trainer and ECI Technical Manager
- c) Follow up with attendees (thank you note included with the evaluation email)

2.0. ECI Partner Events

ECI will approve organizations, groups, or individuals to initiate and coordinate presentation events. These organizations, groups, or individuals (“Partners”) may propose to partner with ECI using the following procedures.

2.1. Submit Request to ECI

All requests to ECI shall have, but not be limited to the following minimum information submitted to ECI at training@envirocert.org.

- a) Date and Time
- b) Review(s)
- c) Location
- d) Room (and any associated costs)
- e) A-V Equipment (and any associated costs)
- f) Review Costs to Charge Applicants
- g) Cancellation Date
- h) Minimum student requirements
- i) Marketing approach and requested ECI support
- j) ECI support requests

The request may be made in a letter or email and ECI will initiate the review and approval process. Once the request is complete, ECI will respond within 48 to 72 hours.

2.2. ECI Review of Event Proposal

ECI will review proposal and notify the Partner of the acceptance or rejection.

Rejection: If the Event Proposal is rejected, the Partner (presenter/trainer/organization/group) will be notified of the reason for the rejection. If possible, suggestions or recommended changes may be included.

Acceptance: If the Event Proposal is accepted:

- a) The Registration Form will be provided on the ECI website.

Notes:

- Partners are not allowed to make any changes to the ECI registration form.
- Partners are not allowed to substitute their own registration form without ECI approval.
- Partners shall direct all applicants to return completed registration forms to ECI.

- If Partners receive registration forms, they are to immediately forward them to ECI.

- b) Once the signed Partner Event Agreement is received by ECI, the event will be posted on the ECI web calendar

2.3. Partner Event Registration Procedures

ECI will coordinate and accept registration for proposed events. The ECI website provides a list of review event fees. Deviation from this standard fee will require justification.

All applicants and Partners should be aware that classes will not be confirmed until 10 days before the event, unless otherwise stated/approved by ECI. Travel plans should be made accordingly.

At the 10-day milestone, ECI will email the respective Partners, presenters/trainers and attendees confirming the class and providing location details. ECI will develop a standard form with the pertinent information.

At 3 days prior to the confirmed event, the Partner and presenter/trainer will be provided a final event attendee list via email. The presenters/trainers shall contact the attendees via email with a brief introduction and any other information. Any changes or modifications to presentation logistics shall be approved by ECI and strictly coordinated by ECI, who will contact the attendees.

ECI will work with the sponsor to determine how room and AV equipment needs will be addressed for ECI Partner Events. IF ECI arranges for one or both, ECI will pay for the reservations and deduct that expense from the Partner earning.

On the day of the event, the Partner shall have all attendees sign in using the standard "ECI Attendance Form" and then mail or email the complete form to ECI as soon as possible. No unregistered attendees will be permitted (except by ECI staff and ECI-approved personnel). Failure to adhere to this policy and will be deemed a violation subject to discipline.

Following the event, each attendee will receive a Presenter/Trainer Survey and a Participation Certificate from ECI.

2.4. Issuance of Payment for Partnering Event

After receipt of the ECI Attendance Form and confirmation that all associated tasks have been properly completed (e.g. includes room was left in proper condition, no damages, etc.), ECI will provide the Partner an accounting summary of all attendee fees paid, and deduction summary of ECI registration fees, room, A-V costs, etc.

ECI will issue the summary form for the Partner to review and approve. If the Partner has reimbursable expenses, they shall provide a current W-9, fee invoice and all original receipts for associated expenses.

Upon approval of the accounting, ECI will issue the Partner a final payment check.

2.5. ECI Event Closeout

At the completion of the event, and before mentioned tasks, ECI will perform the following:

- a) Follow up with location contacts to ensure there are no outstanding issues
- b) Input attendee evaluations and forward to the presenter/trainer and Technical Manager
- c) Follow up with attendees (thank you note included with the evaluation email)
- d) File presentation records and enter notes in CMS under "Candidate History"

Related Documents

ECI Documents:

ECI Presenter/Trainer Agreement
ECI Attendance Form
Attendee Evaluation Reports (internal document)
Peer Evaluation Reports (internal document)

Other Documents:

ECI Certification Committee State Representative Duties
ECI Fees (Please visit ECI website for current fees)

Related Links:

<https://envirocert.org/exams-reviews/> - EXAMS & REVIEWS