



This ITRC Training Program Policy Manual documents the ITRC Training Program policies supporting the ITRC Training Program Strategy dated August 31, 2006 [available at <http://www.itrcweb.org/About/Planning>]. Additionally, a series of procedures, guidance, and other tools are located at: on the ITRC team resources page under phase 3 product development to help guide the training development and delivery process. Users should also contact the ITRC Training Program Support at training@itrcweb.org to learn more about the Training Program.

The policies support the guiding principles listed in the Training Program Strategy and provide a framework of rules by which the program will operate and be managed. Exceptions may exist but require approval by the ITRC Program Administrator (or his or her representative) prior to beginning training development.

- (1) Training Program Serves as an ITRC Implementation Function** – ITRC training development and delivery is an ITRC implementation activity connected to existing or past ITRC projects (not a stand-alone function).
- (2) Basis for Curricula** – Unless an exception is requested and approved by the ITRC Program Administrator (or his or her representative), ITRC Technical and Regulatory Guidance documents are the basis for curricula. ITRC training curricula provide the student with tools to evaluate, select, and design the proper application of environmental solutions and integrate proper and critical decision making into the technical elements of the application. All training courses are developed and tested using a prescriptive process [Insert ITRC web location] including “dry run” testing before ITRC state members and other professional peers. The feedback from this testing ensures the course meets ITRC quality criteria and member needs.
- (3) Required Quality Criteria** (minimum ITRC standards)
 - a. Based on Technical and Regulatory Guidance document (or formally granted exception) (see section 2)
 - b. Provides fundamentals to advanced analysis and/or decision-making information (not a series of stand-alone lectures)
 - c. Meets quality assurance and testing requirements (see section 7)
 - d. Specific to multi-day classroom-style training – includes student practice sets (e.g., story problems, modeling exercises, hypothetical or real site analysis) – (see section 4b)
 - e. Specific to multi-day classroom-style training – includes defined panel discussion topic and objective to identify regional variations in application (see section 4b)
- (4) ITRC Course Delivery Mechanisms** – The information below describes the primary mechanisms through which ITRC will deliver training courses:
 - a. **Internet-based Training (IBT)** – Internet-based training development and delivery is required for all Technical and Regulatory Guidance documents and is developed concurrently with the technical team’s final reviews and preparation of the associated document. The IBT is to be included in a technical team’s annual work schedule for all Technical and Regulatory Guidance document project work plans. The typical schedule for IBT curriculum development occurs in parallel with the last six months (minimum) of document development to use a comparison process to ensure consistency of the written narrative of the

guidance with the training instruction. Each IBT training session is approximately 2 to 2¼ hours. IBT is developed for non-guidance documents and emerging issues ONLY on a case-by-case basis upon written request to the Training Program Liaison and approval of the ITRC Program Administrator (or his or her representative).

- b. **Multi-day Classroom-style Training (CT-Multi)** – The overriding objective of ITRC classroom training is to allow students the opportunity to further understand the details of the topic and its application, as well as promote better decision making beyond what is contained in the guidance. This training includes hands-on problem solving to engage the students into real world or site applications. Classroom-style training requires demonstrated market need for more in-depth curriculum beyond Internet-based training. CT-Multi requires a separate proposal be developed by the related technical team in consultation with the Training Program justifying the need, clarifying the goals, projecting the schedule, identifying potential funding sources, and estimating the costs. The pay-off of CT-Multi is to offer these training courses multiple times over multiple years to ensure return on investment. Therefore, these proposals require multi-year cost estimates for development, planning, and delivery before consideration within the ITRC proposal approval process. Due to the multi-year nature of classroom-style training development and delivery a multi-year commitment of resources must be considered. Curriculum development typically occurs after development of IBT but under some circumstances could be developed in parallel. Scheduling public offerings requires the following activities:
- i. advance planning – beginning at least 9 months prior the first offering
 - ii. advertising – beginning at least 6 months prior to the related offering
 - iii. opening registration – must open at least 4-6 months prior to the related offering

The typical length for a CT-Multi is 2 to 2 ½ days. More complex training integrating multiple ITRC guidance decision systems may require longer training periods.

- c. **Short Course Classroom-style Training (CT-Short)** – A CT-Short is based on either an expansion of an IBT or an abbreviated CT-Multi and assumes formal testing requirements have been met. However, for any new or significantly expanded course curriculum formal testing is required to ensure ITRC quality. It is often a case-by-case exception but will still require formal testing as defined in the IBT or CT-Multi development prior to its first public delivery. This formal testing ensures the subject is properly represented in an educational forum and is not confused with a typical scientific or engineering professional presentation. Typical length for a CT-Short is 2 to 4 hours and not to exceed 8 hours. CT-Short may be part of an existing meeting or conference.

(5) Training Team Requirements

a. Instructors

- i. ITRC Instructors must be members of the associated ITRC technical team during document and curriculum development. Industry instructors must meet ITRC Industry Affiliates Program (IAP) membership requirements as outlined by the IAP during guidance (or associated)

document development. For training courses where the development was begun prior to 1 January 2009, once the technical team formally closes, the training team continues to develop and deliver training without IAP requirements. For any course beginning development on or after 1 January 2009, industry instructors must meet ITRC Industry Affiliates Program membership requirements through the development process and delivery cycle (which is typically three years).

- ii. At least one instructor must be a state member of the technical team who developed the training and associated guidance document.
 - iii. For classroom training, an instructor serves as an instructor at multiple deliveries. A guest lecturer or a member on a panel within the ITRC training event (e.g., CT-Multi) is not considered an instructor.
 - iv. State regulators who are ITRC classroom training instructors are reimbursed for travel expenses according to ITRC Travel Policy to develop and instruct ITRC CT-Multi. ITRC classroom training instructors who are members of academia or stakeholders may be reimbursed for travel expenses according to ITRC Travel Policy depending on available funding.
 - v. Instructors should be limited to a maximum of four per event and each must play a significant role throughout the training course. In addition, alternate instructors will be a part of the training development and delivery but only four primary instructors should travel to each training location. Instructors or speakers with a special professional emphasis or regional emphasis should be invited to participate on a case-by-case basis as guest lecturers, but should not be included as a permanent part of the curriculum. More than four instructors per event may be allowed on a case by case basis with approval from training program if the team leader can demonstrate the need for more than four instructors.
 - vi. Instructors must be capable of developing and delivering educational material and trained or experienced in the training topics.
 - vii. Instructors are expected to commit to being instructors for the full life cycle of the training. The expectation is that courses will be delivered over a three year period after course development is complete.
- b. **Professional Conduct and Conflict of Interest** – It is expected that instructors will represent the ITRC, will not market products or company services and will follow the ITRC Conflict of Interest Policy. (See chapter 10 of ITRC Governance Document at www.itrcweb.org).
 - c. **Clarification of "Technical Team" vs. "Training Team"**. According to the ITRC Project Life Cycle available on the ITRC Team Resources Web page the technical team formally closes out when they complete their final guidance. ITRC *training* teams are organized, through their relationship with their *technical* team to develop and deliver the classroom-style training. The training team is composed of technical team members (instructors) and the Training Program. The training team is an active ITRC group, although not open to outside membership. The training team is part of the implementation strategy of the

project (see Project Life Cycle document) and requires basic ITRC services (e.g., website functionality for exchange training materials).

- d. **Proctors** – Proctors provide direct assistance to the instructors and students during CT-Multi sessions. In addition, proctors can assist the on-site training coordinator with registering, welcoming, and seating students, and any other support as requested for the classroom training event. Preference for proctors should be given to state personnel to reinforce the state-led nature of ITRC, but proctors from other sectors can be considered based on the needs of the training class and approval by the Team Leaders. Proctors are preferentially selected from past course students, by the training team to assist in future courses. Selecting the proctors in this fashion ensures that the proctors have a good understanding of the course material and are able to assist training participants in the classroom setting. It also offers the instructors the opportunity to evaluate the potential proctor's ability to support the training personally during a training event. Proctors require only a pre-meeting refresher at the beginning of the next offering. State regulatory personnel acting as proctors with approval of the team leaders are reimbursed for their travel costs to assist in ITRC training courses according to ITRC Travel Policy. Academics and Stakeholders acting as proctors with the approval of the team leaders may also be reimbursed for travel at the discretion of the team leaders, depending upon available funding, and according to the ITRC Travel Policy. The costs associated with traveling state regulatory personnel, academics, and stakeholders will be included in the classroom training budget planning estimates. The number of proctors will be dependent upon the total number of students anticipated for a specific training course offering (typically 2 to 4 proctors per course).

Based on course content if it is determined that the same proctors need to be used for each class, the expectation is that the proctor will be available for the delivery period of the course (for example two to four years),

- (6) **Audience** – ITRC training courses are developed for decision makers (*i.e.*, state and federal regulators and site owners) and implementers (*i.e.*, consultants) although other environmental sectors (*e.g.*, citizen stakeholders) also participate in ITRC training courses. The primary audience for a specific training is dependent upon the contents of Technical and Regulatory Guidance document(s) that serves as the basis for the training and the training itself. Targeting specific customers may be necessary on a case-by-case basis.
- (7) **Quality Assurance and Testing** – All ITRC training courses require steps to ensure quality (*e.g.*, a series of practices for course development and dry run testing with state members). Developing and delivering a quality training curricula includes the following activities:
- a. The training team works together to prepare the training curriculum.
 - i. establishing the training objective
 - ii. outlining the key training content from the Technical and Regulatory Guidance document(s)
 - iii. developing an engaging training approach (*e.g.*, for classroom-style training: practice sets, sequential problem solving, modeling exercises, case studies and lessons learned)

- iv. preparing curriculum material (e.g., slides, links to additional resources; and additionally for classroom-style training: problem sets and answer sheets, modeling exercises, or other handouts)
 - v. practicing the training approach and content to establish flow, timing, adequacy of content, transitions, and evaluate and improve instructor communication techniques
- b. A dry run of the full training course, including practice sets or problems (specific to classroom-style training) with 20-30 students, is held in-person or via the Internet in the case of IBT, near the end of curriculum development. This dry run must be a replicate of the actual training; however, the course may be stopped, and discussion held with students, in order to reorganize or change information or the training approach. Attendees should represent the pre-defined audience (*i.e.*, typically the majority being state regulators from ITRC member states). In addition, the IAP should be consulted to designate potential dry run attendees to provide input.
- c. The Training Program Liaison and Training Program Support will formally evaluate the course curriculum and delivery to determine if the course is ready for full delivery or the training team must make significant changes to the curriculum and test again before it is ready for full delivery. Testing criteria includes the following elements:
- i. confirmation of quality criteria (see section 3)
 - ii. completeness of training materials (*e.g.*, slides, problems sets with answers, etc. – depending on training delivery system)
 - iii. accuracy of training materials
 - iv. positive student feedback
 - v. instructor attendance at designated dry run location (*i.e.*, in-person location for classroom-style training and Internet for IBT)

(8) Partnering and Sponsorship of ITRC Classroom Training Courses – Host state participation is required for multi-day classroom training delivery. Sponsorship or partnership by other entities may be included but not required. Sponsors provide financial support to the ITRC for the training. Partners provide in-kind services supporting the ITRC training.

- a. **Host State(s)** – CT-Multi requires commitment from a member state to host ITRC training. At a minimum, this commitment requires a state to do the following activities:
- i. provide a lead contact person to work with the training team during planning and delivery to ensure state hosting requirements are fulfilled
 - ii. provide lists (including e-mail and contact information) of potential students on a state and/or regional basis (*e.g.*, state agency personnel, consultants, federal agencies, site owners, local government representatives, community stakeholders)
 - iii. assist in properly locating the venue and evaluating site characteristics
 - iv. provide onsite training team assistance

- v. may be requested to provide a state agency executive-level opening speaker
 - vi. identify and invite a community stakeholder(s) to participate in the training course
 - vii. provide state agency expert to serve on panel session as part of training curriculum
- b. **Federal Agencies** – May request training be held at or near a federal reservation or in a specific federal region (e.g., EPA Region 5, DOE Hanford, DoD Picatinny Arsenal). The agency must at a minimum provide the following activities:
- i. ensure a host state as described above
 - ii. provide a lead contact person to work with the training team during planning and delivery to ensure federal agency hosting requirements are fulfilled
 - iii. provide lists (including e-mail and contact information) of potential students on a state and/or regional basis (e.g., state agency personnel, consultants, federal agencies, site owners, local government representatives, community stakeholders)
 - iv. establish an expected minimum number of students from the region, site, or federal reservation
 - v. may be requested to provide a federal agency executive-level speaker
 - vi. provide federal agency expert to serve on panel discussion as part of training curriculum as requested
- c. **Local Governments** – May request a training event, and at a minimum provide the following activities:
- i. ensure a host state as described above
 - ii. provide a lead contact person to work with the training team during planning and delivery to ensure local government hosting requirements are fulfilled
 - iii. provide lists (including e-mail and contact information) of potential students on a state and/or regional basis (e.g., state agency personnel, consultants, federal agencies, site owners, local government representatives, community stakeholders)
 - iv. assist in properly locating the venue and evaluating the site characteristics
 - v. may be requested to provide an executive-level speaker from an associated local agency
- d. **Non-Profit Organizations** – May request training be held in conjunction with association events (e.g., annual meetings or conferences) and must at a minimum provide the following activities:
- i. ensure a host state as described above

- ii. provide an association mailing list (including e-mail and contact information)
 - iii. ensure a pre-determined minimum number of students
 - iv. provide financial support to the ITRC for the training, if a sponsor, or provide in-kind services supporting the ITRC training, if a partner
- e. **Private Companies** – May request ITRC training and must at a minimum provide the following activities:
- i. ensure a host state as described above
 - ii. must sponsor the full cost of a training event
 - iii. in-kind services (partnering) cannot substitute for sponsorship in order to ensure the independence of ITRC trainings
- (9) **Materials Ownership and Use** – Documents and training curricula developed by training teams are the property of ITRC under U.S. copyright laws.
- (10) **Promotion of Commercial Products and/or Companies** – It is not the intent of ITRC to promote any individual commercial products or companies but to provide tools to promote better decision making when innovative technologies and approaches are considered.
- (11) **Standard ITRC Disclaimer and Copyright Language** - The following language is used for all ITRC products, as provided by the ITRC Program Administrator:

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The following text is to be inserted into each ITRC training curriculum:

Although the information in this ITRC training is believed to be reliable and accurate, the training and all material set forth within are provided without warranties of any kind, either express or implied, including but not limited to warranties of the accuracy, currency, or completeness of information contained in the training or the suitability of the information contained in the training for any particular purpose. ITRC recommends consulting applicable standards, laws, regulations, suppliers of materials, and material safety data sheets for information concerning safety and health risks and precautions and compliance with then-applicable laws and regulations. ECOS, ERIS, and ITRC shall not be liable for any direct, indirect, incidental, special, consequential, or punitive damages arising out of the use of any information, apparatus, method, or process discussed in ITRC training, including claims for damages arising out of any conflict between this the training and any laws, regulations, and/or ordinances. ECOS, ERIS, and ITRC do not endorse or recommend the use of, nor do they attempt to determine the merits of, any specific technology or technology provider through ITRC training or publication of guidance documents or any other ITRC document.

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(12) Course Registration Fees – It is understood that although the Training Program generates revenue through tuition and sponsorship fees, revenue alone will not sustain the program. Annual organizational funding is therefore required to operate the Training Program.

- a. **Internet-based Training (IBT)** – Sponsored by ITRC and EPA Office of Superfund Remediation and Technology Innovation via the CLU-IN website with no cost to the participants.
- b. **Multi-day Classroom-style Training (CT-Multi)** – The ITRC registration fee structure for each course is based on the following table:

ITRC Course Registration Fee Summary for CT-Multi

SECTOR	REGISTRATION FEE	TRAVEL REIMBURSEMENT*
State Environmental / Regulators	0%	For selected group – typically 20 per course offering
Local Government Environmental	0%	None
Non-Profit Organization	100% (unless waived by sponsoring or partnering)	None

	agreement)	
Federal Agencies	0% based on space available if confirmed by ITRC Federal Agency Board Liaison that participant represents an organization that has a partnering agreement with ITRC 100% if participant is not confirmed by ITRC Federal Agency Board Liaison that participant represents an organization that has a partnering agreement with ITRC	None
Federal Contractors	0% based on space available if confirmed by ITRC Federal Agency Board Liaison that contractor participant represents an organization that has a partnering agreement with ITRC 100% if contractor participant is not confirmed by ITRC Federal Agency Board Liaison that participant represents an organization that has a partnering agreement with ITRC	None
Industry (IAP Members) (see IAP requirements at www.itrcweb.org)	Gold Members - 25% discount on course tuition Standard Members - 15% discount on course tuition	None**
Industry (non-IAP members)	100% (unless waived by sponsoring or partnering agreement)	None**
Academia (including full-time students and professors)	0% based on space available (not to exceed 5% of total class size)	None***
Community Stakeholders	0% based on space available	None***
Tribal Environmental Representatives	0% based on space available	None***
ITRC Training Team (instructors, proctors, support)	0%	100% for expenses (based on ITRC Travel Policy)

* Travel Reimbursement / Training Scholarship – Selected state officials/regulators are reimbursed for travel expenses incurred for attending ITRC classroom training based on ITRC Travel Policy. It is expected that ITRC will cover travel expenses for 20 state environmental officials / regulators per course offering. The coordination of this effort will

be conducted by Training Program Support in conjunction with ECOS/ITRC management who will reimburse those participants designated to receive the scholarship.

** Training Scholarships are not available for IAP or Non-IAP members of private industry.

***Travel reimbursement and Training Scholarships for academia, community stakeholders, and tribal environmental representatives may be available on a limited basis depending on funding.

- c. **Short Course Classroom-style Training (CT-Short)**
 - i. **Fees** – If the ITRC is a sponsor of the short course no fee for state and local environmental governmental officials; flat fee per student for all other sectors unless waived by a partnership or sponsorship agreement. If the short course is being held as part of an independent conference, all registrants may be required to pay conference registration fee and possibly a separate fee for the short course,
- (13) **Continuing Education Options** –ITRC Training Program Support will provide certificates of participation to CT-Multi and, as requested, to CT-Short participants. Additional continuing education certification may be provided for some classroom training events, based on interest and availability.