



**INTENTIONAL ENERGETIC PRESENCE®**

**YOUR PRESENCE  
IS YOUR IMPACT.**

Personal & Collaborative Power for  
Individuals and Organizations

## IEP STEWARDSHIP PROGRAM OVERVIEW

**LEVELS 1 & 2**

FOR IEP-TRAINED & IEP-CERTIFIED STEWARDS



"Stewards" help take this content out into the world (their organizations, their industries, and with their clients) in their own unique ways blended with their own work and personality. This is intentionally not called a "train-the-trainer", "coach training" or "facilitation program"; it is "stewardship" of the IEP work and content. After all, it takes a village. And when we all Show Up together... Magic happens.

# IEP STEWARDSHIP PROGRAM OVERVIEW



**Stewardship Training is for Practitioners and Organizations who want to use the IEP Method® (Intentional Energetic Presence®) in their work with clients and teams.** This program enables participants to go back and keep this content alive in their lives and businesses and with their teams in a way that is internally guided and generates authentic momentum and sustainability in the culture. This program provides the fundamentals of Stewardship which enables and supports people to dive deeper into the work, learn how to work more closely with the core concepts and tools, master their own IEP Practice, and share these concepts and tools in coaching sessions and conversations with others.

**Stewardship enables participants to lead and share content from the 1/2-Day "IEP Fundamentals Session" inside their organization and/or with their 1:1 clients** in order to pay-it-forward with the content and principles of the work in an authentic, cost-effective, and Steward "owned" manner.

**At this point, Stewardship does not license or enable any user to lead the official full one or two-day "IEP Live! Leadership & Influence Intensive"** (however, should we expand offerings, Stewardship at the "IEP-C" level will be a pre-requisite for leading more intensive sessions).

There are two levels of Stewardship: IEP-Trained (IEP-T) and IEP-Certified (IEP-C), which prepare, support, and enable the Steward to work at different depths and scales with clients and organizations. (See distinctions for IEP-Trained vs. IEP-Certified Stewards later in this document.)

Distilled down from thousands of hours doing this work in the trenches and years working with organizations and individuals in integrating the IEP tools and content into their leadership, culture, and processes, the IEP Stewardship Program has been extremely intentionally crafted -- with love, care, rigor, and an intention of being fully in service of the humans who use it and those they lead through it, as well as the quality and purity it is shared with. We hope you love it!

To the village of creating positive impact,



LEVEL1 TRAINED

## Level 1: IEP-Trained Steward (IEP-T)

For individuals and practitioners who want to use this content within their organization (inside one organization only) and/or with their 1:1 private clients. IEP-Trained Stewards learn to teach, share, and integrate the IEP Fundamentals at a deeper, wider, and higher level of mastery.

The intention of Stewardship is to "pay-it-forward" in a high integrity and well supported manner so that more humans can benefit from the methodology.

Upon successful completion of the 4-day base training, Learning Labs, and practice IEP Launch, participants will receive the designation of IEP-Trained Steward. In addition we've designed a series of Integration & Learning Labs, monthly Q&A calls, quarterly community virtual engagements, and an online platform for IEP-Trained Stewards to support the Steward in deepening their learning, strengthening their own IEP, and ultimately being a successful Steward of the work. Information about the IEP Base Training, outcomes, benefits, best practices, requirements, and pricing can be found on the following pages.



LEVEL2 CERTIFIED

## Level 2: IEP-Certified Steward (IEP-C)

For individuals and practitioners who want a deeper level of mastery, more training and engagement, more access to Anese, more private work, and a greater reach in order to use this content not only within their own organization and 1:1 private clients, but as an independent practitioner leading the Fundamentals with their own clients. IEP-Certified Stewards are also eligible for being contracted out by Anese's team for additional work. (You must be certified to be on the recommended Stewards list.)

The intention of Certification is to grow Stewards at a deeper level so that they are able to teach the work with more mastery, create more value for their clients and revenue for their business, and be a part of the Global Stewardship vision for the IEP work.

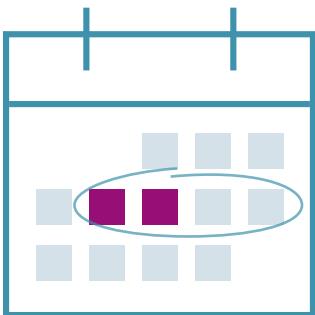
**After six months, upon successful completion of the first six months of the IEP-Trained Steward Program, Stewards are eligible to apply for certification.** If you are accepted into the program, you will move into the Certification program over the next year. The total certification process is 18 months, from the start of IEP-Training (6 months) to completion of IEP-Certification (12 months). (If certification is not completed within 18 months, you will be given a six-month grace period to complete it with assistance from our team — additional training fees may apply.)

### IEP-Trained or IEP-Certified? Which is best for you?

Simply put, how far and how deep do you want to go with this work? If your organization just wants you to lead the IEP Fundamentals work internally, you want to bring it to your own team or 1:1 private clients, or you simply want greater mastery for yourself, go IEP-T. We'll have a great time.

If you know you want deeper mastery, more in depth training, and/or you want to make it a part of your own private business as an independent practitioner, generate revenue from it for your business, and be eligible for being sent out as part of Anese's team leading the work, you'll want to do Certification. We'll have a great time and do even more together.

# IEP STEWARDSHIP BASE TRAINING—4 DAYS.



## Days 1 & 2: IEP Live! Leadership & Influence Intensive.

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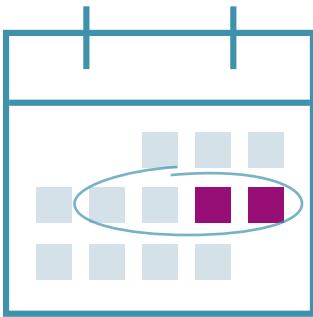
### The participants learn (as participants):

- How to use The IEP Method®.
- How to take accountability and ownership for their life, leadership & outcomes.
- How to be better collaborators and communicators.
- How to be at choice around how they show up, how to choose language that serves them, how to be the author (vs. the victim) in their lives/relationships.
- How to optimize their leadership presence and therefore influence.
- How to work “in front of the room”, stepping more deeply into powerful and authentic presence.
- How to create healthy agreements, give and receive productive feedback, handle conflict, create alignment, and be the “cause”, not the “effect” of everything that happens to them.

### Participants receive:

- IEP Live! Fieldwork Guide
- IEP Survival Guide
- Seven (7) weeks of The Beat post-training to help in integration
- An experiential interactive life-giving experience, modeling IEP practices with meals, a great environment, and awesome support/team to hold it all

These two (2) days are the foundation for participating in IEP Stewardship Training. (Note: If you've already participated in an IEP Live! within the last year, you may choose to serve as a Room Angel for a “behind the scenes” experience. It is mandatory that you attend all four (4) days of base training, even if you've attended the 2-day before. No late arrival, no early departure.)



## Days 3 & 4: IEP Stewardship Training.

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All Stewards will work together for two (2) days after the IEP Live! Session. While the focus of IEP Live! was on you AS participant, the Stewardship Training focus now moves to you as Steward taking a deeper dive into the content, and behind the scenes of IEP, so that you can more effectively share this work with others.

This session is a combination of personal and group experiences, lecture and group discussion, working through training modules together, front of the room leadership, presence work, practicum, and practices to help you become more effective on the ground stewarding the content. We'll have two (2) Learning & Integration Labs ("LL") (virtual sessions with your cohort) in the months following the initial training to reconnect, follow up, answer questions, and help accelerate and deepen integration.

In addition to your basic training and backend support, you will have post-session fieldwork, including leading a trial (FUN!) mini IEP Fundamentals Launch with a group of peers (8 people or less, we keep it cozy for the first one!), between LL1 and LL2.

Upon full participation and successful completion of the 4-day base training, LLs, and practice launch, you will have the tools and practices to steward the work via modeling, sharing and coaching content, as well as via leading the 1/2-day (3-4 hour) **IEP Fundamentals Session** in your organization and in your work with private 1:1 clients.

If your desire is to move forward with Certification, after six months of training, you'll be eligible to apply for Certification! Easy peasy AND intentional: Complete an application, meet with someone on our team to ensure optimal conditions for all, and then, we GO! You'll maintain access to all IEP-Trained benefits as you move into the Certification practicum.



## WHAT IS THE “IEP FUNDAMENTALS” SESSION?

The IEP Fundamentals is a condensed version of the 2-day event, with IEP distilled down to its core content, in a simple format, to help Stewards share and coach this content with others in a 1/2-day session (3-4 hours)\*. This content provides a valuable foundation for other models, types of coaching, and skills training that will help accelerate results (and well-being) in how people Show Up in life, leadership, and culture. Consistent feedback offers that the Fundamentals session "could/should be" the foundation for any other skills, sales, communication, or leadership training as conscious IEP saves time, energy, money, and drama, and sets the tone for positive impact. Feedback has also consistently shown us that the IEP training can unlock the potential for other organizational training investments as the "being," and accountability for "showing up," that is cultivated during IEP, accelerates the "doing" and skills taught in most traditional training. During Stewardship training, you will learn how to share this content well (and in a way that's authentic to you), exercises to go with it, and how to have coaching conversations around it.

### **Stewardship training will support you in doing the following with your private clients:**

- Creating Agreements and setting the container for meetings and conversations
- Teaching the 3 primary components of the IEP Method: The Presence Reboot, 5-Steps to Intentional Impact, and Building a Strong IEP Foundation (aka working the IEP Model)
- Sharing / Coaching 20 proprietary IEP-Specific Tools (tools are shared over the course of the year in post-session Learning Labs and the Virtual Quarterly Live Learning Labs ("QL3s")

### **Examples of “support tools” in Stewardship Training:**

- IEP Fundamentals Timeline & Training Deck (plus best practices for setting the container for optimal learning and experiences; i.e. flipcharts, tools, what to do before/during/after, and how!).
- Content components, experiential components, and coaching components for each section.
- Specific IEP Tools, frameworks, and worksheets to use with participants in sessions.
- Access to monthly IEP Stewardship Q&A calls and Quarterly Live Learning Labs ("QL3s") to support Stewards in ongoing integration, support, and quality control.
- Membership in our on-line IEP Steward School that serves as a repository for all content. You will also gain access to IEP School for your OWN leadership development. (This can also be used in conjunction with your team/org/clients' participation in IEP School if they enroll as well.)

The higher your level of engagement in Stewardship, the more confidence, credibility, and skill you'll have in these discussions and the more tools and exercises you'll be introduced to.

\*The most important thing in this program is that you are **actively honoring, building, embodying, and working your own IEP practice as this will serve you and your clients exponentially in learning from, and with, them.** This is essential to your building credibility with clients — your presence really truly IS your impact. To Steward this work successfully, you *must* be hungry to steward yourself first and work your own IEP every day. The Stewardship Program is designed to ensure that you are optimizing your own IEP as you go and thereby set up for greater success in integration with the people you serve. **Stewards consistently share that the more they work their own IEP the better a teacher they are of the content and the better the feedback/results.**

# LEVEL 1 BASIC: IEP STEWARDSHIP TRAINING PROGRAM. (4 DAYS)



## **The Base Training Program (Phase 1, Months 1-3):**

- Pre-Work to help us both prepare, give me more information about you, your current state, and what you most want to take away from this Program.
- 4-day Training Session, includes first two (2) days which are IEP Live! and devoted to *you* and your own IEP as a leader. (If you've already attended an IEP Live! within the last year, you'll have the option to participate again OR be a Room Angel and see it from an entirely different perspective.) The second two (2) days are devoted to Stewardship and learning how to use this content in your work, in your organization, and more deeply in your life.
- Two (2) Stewardship Learning & Integration Labs, as well as a practice Launch, in the months following Base Training for review, Q&A, and locking it all in.
- Post-Stewardship Training special "IEP Beat" Series for weekly support and reminders.
- Membership in IEP Steward School with access to content, our tools and training repository, and all training materials. This is private to IEP-Trained and IEP-Certified Stewards only.

## **Base Training Program (Phase 2, Months 4-12):**

Continued Membership in IEP-Steward School with new access to Quarterly Live Learning Labs (QL3s), Monthly Q&A calls with the entire Stewardship Community, and advanced proprietary tools. We've created this to support intentional engagement that grows as you do. Ongoing Membership is required to maintain designation and access to Stewardship content, to ensure integrity of the work, and to support you in providing quality training and sharing in your organization. (Your first year is covered in your initial Stewardship Training tuition. Membership fees kick in at month 13.)

Everyone, on the Training Track or Certification Track, will participate in and complete the Base Training. On the following pages we've broken down the Training and Certification tracks with requirements, training scope and abilities, and cost breakdowns for each.



# IEP-TRAINED STEWARDSHIP REQUIREMENTS:

You desire a strong foundation in Stewardship training, want to integrate the IEP work and principles into your organization and, optionally, into your work with your 1:1 private clients. You are not planning to teach the IEP Fundamentals outside of your organization, but rather intend to knock it out of the park internally and 1:1 (if 1:1 work is your thing)!

This program is for people who work *within* an organization and want to pay it forward, as well as for practitioners who want to use the work with their private 1:1 clients and NOT teach the IEP Fundamentals to groups *outside* their organization (which requires Certification).

## **Requirements for IEP-Trained Stewards are as follows:**

- Has high integrity and is committed to growth and showing up, actively works on their own IEP, embodying the work.
- Works within an organization and has sponsorship and support for Stewardship to better enable successful integration. Or... works independently as a practitioner and is planning to integrate this content with their 1:1 clients in their coaching or helping practices.
- If working with private 1:1 clients, carries their own professional liability insurance, creates clean agreements/contracts with clients, and is responsible for their results. (ACI is not responsible for your results.)
- Attends, and participates in, all 4 days of Base Training, as well as the follow-up Integration Labs.
- Runs an IEP Fundamentals practice Launch (with feedback collected) between LL1 and LL2.
- Attends/Reviews at least 70% of the calls and programming. (Calls can be made up via the recording after the session, you must let Anese/Team know you have participated.)
- Co-creates safe space with the facilitator of the program, as well as the other members of the group by practicing care and healthy regard, holding positive intent, holding a safe space for learning and participating authentically, and being respectful of all members of program. Does not solicit other members of program to become clients.
- Is a positive contribution to other Stewards in the program, pays attention to impact, presence, and the kind of space they are co-creating.
- Sends Anese/Team a quarterly update of how it's going, how many they've shared the work with, what they're working on, what they're bumping up against, and what they need.
- Stays up-to-date on membership fees, requirements, and practices.\*
- Plays nice, is in service of, and has integrity and honor with the work, the others Stewards, and Anese and Team.

\*Please note that Stewardship is a growing model and something that our team is committed to improving upon and optimizing wherever and whenever possible. Therefore, terms of Stewardship may shift as the model grows and we learn more and more about what works, what keeps the integrity of the work intact, what makes it easiest to work with and most user friendly, what's best for the Steward's development, and, what's in service of quality control and YOUR best results. Therefore, please know that the Stewardship Model, as well as the rights around brand and usage, and the requirements for training and CEUs may shift. We will do this as we grow and always in service of quality and integrity and your best outcomes. If/When/As shifts occur in modeling, you will be given a grace period to become compliant.

# QUICK VIEW: IEP-TRAINED REQUIREMENTS & MAINTENANCE

	Phase 1: First 3 Months	Phase 2: Ongoing/Once Trained
<b>Complete Phase 1 of IEP-Trained Stewardship:</b> <ul style="list-style-type: none"><li>• 4-Day Base Training</li><li>• 2 Learning Labs</li><li>• Trial Launch (&lt;8 people) with Feedback</li></ul>	YES! This is completed in the first 3 months of your engagement with us as the baseline for training before moving into training maintenance and membership.	Month 4 begins your Membership. To remain an IEP-Trained Steward and teach this content in your organization (+with 1:1 private clients) you must maintain Membership.
<b>Organizational Sponsor/Host to House the Program</b>	✓	✓
<b>Professional Liability Insurance and direct agreements with your own 1:1 private clients (if applicable)</b>	✓	✓
<b>Maintain personal IEP Practices, integrity of work, and Membership fees (Annual/Quarterly fees start at month 13)</b>	✓	✓
<b>Leads launches with no more than 30 people per launch and proper support with 1 Room Angel*</b>	✓	✓
<b>Attend Monthly IEP-Trained Q&amp;A Calls (9 of 12)</b>	✓	✓
<b>Attend 3 out of 4 Virtual QL3s (Optional)</b>		✓
<b>Maintain an average feedback score of 8+ on your launches**</b>		✓
<b>Complete Quarterly Update Form</b>	✓	✓

\*The IEP Fundamentals launches are 30 people or less per launch and should have at least one Room Angel to support the Steward. This is core to the training, and your agreement as Steward (unless given prior permission from ACI to do this differently).

\*\*During Phase 1 we'll work with you on Feedback scores. After Phase 1, feedback scores will be compiled on a "rolling basis" of the last three sessions. If you fall below an average of an 8+ in feedback for three in a row, you'll need to schedule a one-on-one 90-minute deep dive with Anese to refine launch skills for an additional fee of \$1,500. (Includes her reviewing feedback and working with you on next steps.)



# WHAT YOU CAN AND CAN'T DO AS AN IEP-TRAINED STEWARD:

IEP-Trained Stewards are trained and licensed to take this content more deeply into their organization with greater mastery, a deeper and broader level of engagement, and a larger toolkit of tools and resources to use with 1:1 clients.

## IEP-Trained Stewards:

- ✓ Can share and use content within your organization and/or with your private 1:1 clients.
- ✓ Can build content into existing private client work to support development & presence.
- ✓ Can build your own IEP Foundation to support you in showing up more effectively as coach and leader.
- ✓ Can lead the (pure) IEP Fundamentals 1/2-Day Session (3-4 hours) within your organization.
- ✓ Can call yourself an "IEP-Trained Steward" upon successful completion of training.
- ✓ Can have discounts for IEP School and tools for your clients and members of your organization.
- ✓ Can be eligible for more training, direct apprenticeship, and certification if choose to proceed.
- ✓ Can take your Membership with you if you move to another organization.\*
  
- ✗ Cannot lead the IEP Fundamentals Session or IEP work outside your primary organization.
- ✗ Cannot blend the IEP work into other coaching programs or methodologies or training, it must be kept pure and separate if you are teaching it as the "IEP Fundamentals" and the IEP Method. (We've done the groundwork here, promise, this is in everyone's best interest. Once you've taught this pure as a foundation, you can teach other models on top of it, but keep the IEP pure.)
- ✗ Cannot call yourself an IEP Facilitator or IEP Coach or IEP-Certified (this training is a pre-requisite for any future programs of IEP Mastery). This program gives you designation as an IEP-Trained Steward.
- ✗ Cannot lead the IEP Fundamentals Session or IEP work with your organization's clients (you must be certified to bring this to your clients).
- ✗ Cannot lead the 2-day IEP Live! Intensive or any IEP public workshops.

\*If you leave your organization, we've set up a "win-win-win" for all parties. You leave and your Membership goes with you. The new organization pays a \$2,500 fee for assuming your Stewardship. Once you are in the new position, we will do a Virtual Onboarding Consult with you, your new IEP Stakeholder in the new company, and with Anese (or someone from our team). Your Membership fee will renew annually (or quarterly) as originally planned. The original organization, who sponsored you first, can then put someone new through the Stewardship Training at a 50% rate. (All other fees remain the same. Additional fees may apply, on either side, if additional consulting is required in the transition.) In this process we will do an optional "Off-Boarding" Session with you, the original sponsoring organization, and Anese (or someone from our team) to discuss next steps and make sure all is groovy. We do this to pay it forward and honor all parties.

**IEP-Trained Steward Training Track Includes:**

- Four (4) days of Stewardship Training (Includes IEP Live!)
- Two (2) post-event *Group Stewardship Learning & Integration Labs* (virtual sessions)
- *IEP Fundamentals Stewardship Guide, Facilitation Timeline, Training Deck, & Misc. Training Materials*
- *IEP Stewardship Toolkit* with worksheets to share in sessions (20 Tools)
- Twenty (20) IEP Starter Kit print licenses (for your participants) which include: *IEP Fundamentals Fieldwork Guide, Individual IEP Integration Map, the IEP Sheet* (Order more at special Steward Rates.)
- Membership in IEP Stewardship School w/access to monthly Stewardship Q&A Calls, Virtual Quarterly Live Learning Labs\*, IEP School (Recurring Membership Fee of \$3K/year or \$900/QTR is included in your tuition for the first year. Annual/QTRLY Membership Fees begin at month 13.)
- Certificate of Completion as IEP-Trained Steward after successful completion of Base Training

**After successfully completing training, IEP-Trained Stewards will:**

- Have a deeper understanding and competency with the content, as well as real time application and tools they can use to optimize IEP immediately
- Be able to share and coach IEP content, as well as lead the (PURE ) IEP Fundamentals Session within their organization and with their private 1:1 clients
- Be able to work with/coach others to integrate the IEP Fundamentals into their business and life, including use of 20 proprietary IEP tools (tools are shared in QL3s in months 4+)
- Be able to pay this work forward in a meaningful, authentic, and sustainable way
- Be able to continue to enhance, strengthen, and deepen their own leadership skills and presence

Note: This level of Stewardship is the prerequisite for any future programs (including Certification) as well as a next step towards personal IEP Mastery. Stewardship at this level provides you with a solid foundation for sharing this work with others in your life and enables you to lead the IEP Fundamentals within your organization.

**Investment:**

**\$7,500/One Time - Initial Training Fee (Includes Phase 1 & Phase 2)**

**CEU's/Annual Membership: \$3K/Year OR \$900/Quarter (Begins Month 13)**

More details and group pricing on the investment page. Also, see FAQs at the end for more info.

\*Note: To maintain the rights to teach this work inside your organization (and with your 1:1 clients as applicable), access the goods, and call yourself an IEP-Trained Steward, you must maintain your Annual Membership and participate in continuing education. (Annual Renewal Fee for IEP-Trained Stewards: \$3K/year or \$900/quarter and includes ongoing access to IEP Stewardship School, IEP School, monthly calls, Quarterly Virtual Live Learning Labs (QL3s), all content and upgrades as we create them, discounts in other programs for yourself and clients/team, and active standing in the community. Note there will be an additional fee for Live In-Person QL3s once available (they will replace Virtual QL3s — estimated launch 2020.)



# IEP-CERTIFIED STEWARDSHIP REQUIREMENTS:

You desire the deepest level of IEP Mastery, want to integrate the IEP work and principles into more than one organization and into your work with 1:1 clients, and wish to be eligible for referral as an IEP-Certified Steward by ACI (Active Choices, Inc.).

IEP-Certified Stewards are able to use the IEP content and materials from the IEP Fundamentals within their organization and also as an independent practitioner with their clients. The following are basic requirements we've found useful in setting Stewards up for success in leading this work on a bigger scale. **The basics of the IEP-Trained Steward (previous section) are required to get into the program, the following must be achieved over the year after for full certification status.** (Until full status is met, Steward will have special designation to represent "Certification in Process".)

**Additional requirements for IEP-Certified Stewards are as follows:**

- Has high integrity and is committed to growth and showing up, has great IEP actively works on their own IEP practice, and embodies the work.
- Completes the "**Personal IEP Sheet & Practice Project**" for 90 days straight, post training.
- Works with their own company to roll this work out internally on their own team, and externally with other clients. Carries their own professional liability insurance, creates clean agreements/ contracts with clients, and is responsible for their results. (ACI NOT responsible for your results.)
- Is certified as a coach with an ICF-accredited school (or something comparable if in different practitioner industry—bottom line, actively honors and meets professional standards of their industry). Honors and abides by the ICF Code of Ethics and/or the BCC (Board Certified Coach).
- Has at least **3 years experience** coaching, teaching, and/or facilitating inside organizations.
- Attends, and participates in, all 4 days of Base Steward Training (Phase 1), completes the first six months in the IEP-Trained Steward Program, and completes all the requirements for Certification as laid out on the Certification Program page).
- Runs the 8-Person trial launch between LL1 and LL2 (Learning Labs) after initial Steward Training.
- Gathers feedback on the trial launch and shares back for up-leveling skills and impact.
- Runs 6+ launches with 6-30 people + feedback; videos at least one of the launches (three 20-minute segments) for review and feedback with Anese or a Lead Steward. Average feedback score of 8+.
- Participates in two 90-minute Private Deep Dive/Strategy Sessions w/Anese or a Lead Steward on her team (one of which will be the video/supervision debrief).
- Room Angels four (4) days of training with Anese or a Lead Steward.
- Attends/Reviews at least 80% of the calls and programming, successfully completes the "Certification Claim" (our "exam"). Attends 3 of 4 Virtual Quarterly Live Learning Labs (QL3s).
- Co-creates safe space with the facilitator of the program, as well as the other members of the group by practicing care and healthy regard, holding positive intent, holding a safe space for learning and participating authentically, and being respectful of all members of program. Does not solicit other members of program to become clients.
- Sends Anese/Team a Quarterly update of how it's going, how many they've shared the work with, what they're working on, what they're bumping up against, and what they need.
- Stays up-to-date on Membership fees, requirements, and practices (see p.8\*.) Plays nice, is in service of, and has integrity and honor with the work, the other Stewards, and Anese and Team.

# QUICK VIEW: IEP-CERTIFICATION REQUIREMENTS & MAINTENANCE

	<b>Initial Certification: First 18 Months</b>	<b>Certification Maintenance: Once Certified</b>
<b>Complete Phase 1 of IEP-Trained Stewardship:</b> <ul style="list-style-type: none"><li>• 4-Day Base Training</li><li>• 2 Learning Labs</li><li>• Trial Launch (&lt;8 people) with Feedback</li><li>• Plus: Months 4-6 of IEP-Stewardship Membership</li></ul>	This would be completed in the first 6 months of your engagement with us as the baseline for training before moving into Certification.	Once Certified you do not need to repeat this. (Though you are welcome to assist if you'd like refreshers.)
<b>Application &amp; Interview Process for Certification</b>	✓	
<b>Certified as coach, teacher, or comparable credential</b>	✓	Maintain
<b>3 Years Experience Coaching, Teaching, Facilitating</b>	✓	
<b>90-Day IEP Sheet Practice</b>	✓	✓
<b>Run successful launches with 8-30 people + feedback (average feedback score of 8+)*</b>	Run 6 (Includes Trial from Phase 1)	Run at least 10/year** or have 10 paying 1:1 Clients
<b>Support/Supervision</b> <ul style="list-style-type: none"><li>• 3 video 20-minute segments of teaching to review w/AC</li><li>• Participate in two 1:1 90-minute sessions with Anese</li></ul>	1 session for general 1 session for review	
<b>Attend 3 out of 4 Virtual QL3s</b>	✓	✓
<b>Acquire/Maintain Professional Liability Insurance</b>	Have/Acquire upon entry	Maintain
<b>Complete Quarterly Update Form</b>	✓	✓
<b>Attend Monthly IEP-Trained Q&amp;A Calls</b> <b>Attend Monthly Biz of Stewardship Calls (BoS)</b>	9 of 12 9 of 12	6 of 12 6 of 12
<b>Room Angel 4 days with Anese or Lead Steward</b>	At least 4 days	N/A Optional
<b>Complete Certification Claim</b>	Yes, Successfully	

\*The IEP Fundamentals launches are 30 people or less per launch and should have one Room Angel to support the Steward. This is core to the training, and your agreement as Steward (unless given prior permission from ACI to do this differently).

\*\*Feedback scores are compiled on a "rolling basis" of the last three sessions. If you fall below an average of an 8+ in feedback for three in a row, you'll need to schedule a one-on-one 90-minute deep dive with Anese to refine launch skills for an additional fee of \$1,500. (Includes her reviewing feedback and working with you on next steps.)



# WHAT YOU CAN AND CAN'T DO AS AN IEP-CERTIFIED STEWARD:

IEP-Certified Stewards are trained and supported to take this content more deeply into their own organization, with their private 1:1 clients, and for hire with outside clients (if applicable) with greater mastery, a deeper and broader level of engagement, and more tools and resources to use.

## IEP-Certified Stewards:

- ✓ Can share and use content within multiple organizations and with your private 1:1 clients.
- ✓ Can build this content into 1:1 client work to support leadership development and presence.
- ✓ Can build your own IEP Foundation to support you in showing up more effectively as coach and leader.
- ✓ Can lead the (PURE) IEP Fundamentals session within your organization and for others outside your primary organization.
- ✓ Can facilitate the Cultural IEP Integration Map with clients.
- ✓ Can call yourself an "IEP-Certified Steward" upon successful completion of program.
- ✓ Can have discounts for IEP School and tools for your clients and members of your organization.
- ✓ Can take your Membership with you if you move to another organization.\*
- ✓ Can be eligible for more training, direct apprenticeship, and referral from Anese for working with her clients (this is not guaranteed, but rather a desired outcome).
- ✓ Can serve as "Lead Steward" if you have client organizations who would like to integrate a Stewardship Program in their own organization.
  
- ✗ Cannot call yourself an IEP Facilitator or IEP Coach (this training is a pre-requisite for any future programs of IEP Mastery). This program gives you designation as an IEP-Certified Steward which means you are certified to teach the PURE IEP Fundamentals and coach the IEP content with clients and within your organization(s).
- ✗ Cannot blend the IEP work into other coaching programs, content, or training, it must be kept pure and separate if you are teaching it as the "IEP Fundamentals" and IEP Method. (We've done the groundwork here, promise -- this is in everyone's best interest. Once you've taught this pure as a foundation, you can teach other models on top of it, but keep the IEP pure. Thanks!)
- ✗ Cannot lead the 2-day IEP Live! Intensive or any IEP public workshops.

\*If you leave your organization, we've set up a "win-win-win" for all parties. You leave and your Membership goes with you. The new organization pays a \$2,500 fee for assuming your Stewardship. Once you are in the new position, we will do a Virtual Onboarding Consult with you, your new IEP Stakeholder in the new company, and with Anese (or someone from our team). Your Membership fee will renew annually (or quarterly) as originally planned. The original organization, who sponsored you first, can then put someone new through the Stewardship Training at a 50% rate. (All other fees remain the same. Additional fees may apply, on either side, if additional consulting is required in the transition.) In this process we will do an optional "Off-Boarding" Session with you, the original sponsoring organization, and Anese (or someone from our team) to discuss next steps and make sure all is groovy. We do this to pay it forward and honor all parties.

**IEP-Certified Steward Certification Track Includes:**

- Everything in the IEP-Training Track (see previous pages), plus an additional 12 months of training. (Note: The Certification process starts after you've applied/met core training criteria.)
- Post-training two 1:1 90-Minute Integration Sessions with Anese for a personal deeper dive, business planning, video feedback review, and/or whatever you need to set you up for next.
- Your Certification Plan/Timeline outlining next steps, and when, in the process for certification as well as your final "Certification Claim" Exam.
- IEP-Certified Biz of Stewardship Virtual Care Package (includes sample proposal for promoting an IEP Fundamentals Session).
- Additional Tools and content for sharing in sessions and in coaching.
- 1-Hour Monthly IEP-Biz of Stewardship (BoS) Certification group call to discuss business development and the business of leading this work. (These are different than the monthly Stewardship Q&A calls which focus on content and practice.)
- Four (4) 3-Hour Virtual Quarterly Live Learning Labs.
- Thirty (30) IEP Starter Kit print licenses (for your participants) which include: *IEP Fundamentals Fieldwork Guide, Individual IEP Integration Map, Cultural Integration Map, the IEP Sheet*. (Order more at special Steward Rates.)
- Membership in IEP Stewardship School w/access to monthly Stewardship Q&A and BoS Calls, Virtual Quarterly Live Learning Labs\*, IEP School, special access to Certification calls, recordings, and business tools. Post Certification Recurring Annual or Quarterly Membership begins after successful completion of Certification Claim.

**After successfully completing Certification, IEP-Certified Stewards will:**

- Enjoy everything on the IEP-Trained page PLUS: Be able to lead the (pure\*\*) IEP Fundamentals Session with multiple clients, making this work a core part of your business
- Be able to be listed on our website as an IEP-Certified Steward
- Be considered for referral out as part of the ACI Team in leading this work

**Investment: (In addition to your initial Base Training Fee on page 11)****\$6,500/One Time\* - Cert Training Fee (additional to IEP-T training)****CEU's/Annual Membership: \$5K/Year OR \$1,500/Quarter (begins upon completion of Certification)**

More details and group pricing on the investment page. Also, see FAQs at the end for more info.

\*Note: The one time Certification Support Fee covers you for your year in Certification. Upon successful completion of your Certification Claim, you will move over to a recurring Annual/Quarterly Membership. To maintain the rights to teach this work as a Certified Steward, you must maintain your Membership and participate in continuing education. (Annual Fee for IEP-Certified Stewards: \$5K/year, or \$1,500/quarter, and includes ongoing access to IEP Stewardship School, IEP School, monthly calls, Quarterly Virtual Live Learning Labs (QL3s), all content and upgrades as we create them, discounts in other programs for yourself and clients/team, listing on our website, and active standing in the community. Note there will be an additional fee for Live In-Person QL3s once available (they will replace QL3s, estimated launch 2020.)

\*\* "Pure" IEP Fundamentals means that the core session must be kept "intact," taught as designed, and not blended with other bodies of work. You can teach other things on top of it *after* IEP PURE, but the IEP Fundamentals is designed as a foundational program which must be kept clean.

# INVESTMENT:

The following represents current Stewardship Pricing. These fees are effective January 2019.



LEVEL1 TRAINED

## Level 1: IEP-Trained Stewardship Training Program

- \$7,500/Steward. Training includes: Base Training + follow up LLs + Launch + IEP School + 20 Starter Kit Bundle print licenses (Phase 1: M1-3) and Monthly Membership (Phase 2: M4-12)
- \$3K Annual Membership Fee (or \$900/Quarter Recurring Member Fee) beginning month 13. (Includes ongoing access to *IEP School*, *IEP Stewardship School*, Monthly Q&A Calls, and Quarterly Virtual Learning Labs)
- Discount on IEP School Individual Seats for 1:1 Clients or members of your organization
- Ability to order "IEP Starter Kit Bundle" print licenses for your sessions (Includes the *IEP Fieldwork Guide*, *Personal Integration Map & IEP Sheet*) online via *IEP Stewardship School*
- Initial training fee can be paid in full at \$7,500 upon registration to save \$500, OR in two payments; 1st payment upon registration: \$5,600, 2nd payment before the first Learning Lab, of \$2,500.
- Enroll 2 or more Stewards in your organization, save 20% on full tuition for both. (Does not combine with other discounts.)
- Your initial training fees cover you for Phase 1 of training (months 1-3), and Phase 2 Monthly Membership (months 4-12). Additional fees will be material fees past your original 20 Starter Kits, and the costs of books or any other goods you provide your group. Annual/QTRLY membership fees kick in at Month 13. If wish to discontinue participation, may move to IEP-Activator Status for \$1K one-time fee (see FAQs).



LEVEL2 CERTIFIED

## Level 2: IEP Certification Training Program

- In addition to base training, Level 1, for IEP-T...
- \$6,500 Certification Support Fee upon acceptance into Certification Training (approved post completion of six (6) months of IEP-Trained Stewardship, an application, and interview). Certification is 12 months. If you do not complete within 12 months, you will have a 6-month extension to finish certification. (An additional fee of \$2,500 will apply.)
- \$5K/Annual or \$1,500/Quarterly Recurring Membership Fee AFTER COMPLETION of Certification. (Includes ongoing access to *IEP School*, *IEP Stewardship School*, Monthly Q&A Calls, BoS Calls, QL3s, Website Listing, Guest Posts, and possibility for Referrals from ACI)
- Ability to order "IEP Starter Kit Bundle" print licenses for your sessions (Includes the *IEP Fieldwork Guide*, *Personal Integration Map & IEP Sheet*) online via *IEP Stewardship School*
- Your training and certification fees cover you for 18 months (phase 1, 2, and certification). Additional fees include Annual/Quarterly Recurring Membership (at month 18 or after completion of certification), as well as your material fees past your original 50 Starter Kits (20 for IEP-T and 30 for IEP-C), and the costs of books or any other goods you provide your group. If wish to discontinue participation, may move to IEP-Activator Status for \$1K one-time fee (see FAQs).

# IEP SCHOOL MEMBERSHIP

Every Steward trained will receive 20 Starter Kit print licenses to use with their clients (IEP Starter Kit includes: IEP Fundamentals Fieldwork Guide + IEP Sheet + Personal Integration Map), and once in Certification, an additional 30. In addition, each Steward gets access to IEP Stewardship School AND IEP School as part of their tuition for themselves. If you want to add IEP School "seats" for your participants/clients, we've created the following scale for larger impact and cost savings. Rates for IEP School reflect access to all of IEP School for you to work with your clients/team on. If you prefer to purchase modules individually, **you can purchase individually for \$50/person or in bundles of three modules for a one-time fee of \$125/person. Please note that one-time enrollment and individual modules remain static, while the recurring IEP School Membership includes dynamic content (ongoing updated modules, case studies, tools, live calls).** Your clients will receive a discount on IEP School as noted below.

# of Memberships	Enrollment (Static)	+Recurring Monthly Fee (Dynamic)
1-10 People	\$495 each	\$97 / month / individual seat
11-30 People	\$425 each	\$75 / month / individual seat
31-100 People	\$10k group enrollment	\$1,800 / total for group
101-250 People	\$20k group enrollment	\$2,500 / total for group
251-500 People	\$30k group enrollment	\$5,000 / total for group
501-1000 People	\$40k group enrollment	\$7,500 / total for group

## Additional Items/Gifts to Support Integration:

- Contagious Culture **\$17-\$22 / copy (Amazon or 800CEOREAD)**
- IEP Survival Guides **\$12 / copy (Amazon)(contact us for 2+)**
- LeaderYou Will Be: An Invitation **\$19.95 / paperback copy (October 2018!)**
- H2O Meters **\$25 / each (special order only)**
- IEP Starter Kit Bundle Print License **\$20 / each (order via IEP Steward School)**
- IEP Sheet Pads **\$14.95 / each (order via IEP Steward School)**
- IEP School Membership **See pricing above for Steward Rates**
- Individual Modules **\$50/person OR \$125/3-Module/person**

## Add On Custom & Private Services

- Private 90-minute Consult/Coaching/Advisory Call
- Video Review / Feedback Session (virtual, you send me video with 3 clips and we dig in)
- 1/2-Day Private Stewardship Deep Dive Session (virtual or in Rocklin)
- Private Mentorship Program

# QUICK REFERENCE STEWARDSHIP LEVELS

	<b>Level 1 Basic: IEP-Trained Steward</b>	<b>Level 2: IEP-Certified Steward</b>
<b>Who this is for</b>	For individuals & practitioners who want to use this content within their organization & with private 1:1 clients.	For individuals & practitioners who want to take this work deeper, up-level their mastery, and use this content independently in their own business to generate revenue.
<b>4-Day Base Training:</b> <ul style="list-style-type: none"><li>• IEP Live! Intensive as Participant</li><li>• IEP Stewardship Training as Steward</li></ul>	✓	✓
<b>2 Post Training Virtual Learning &amp; Integration Labs (Group Stewardship Calls)</b>	✓	✓
<b>IEP Stewardship Starter Kit: IEP Fundamentals Stewardship Guide, Facilitation Timeline, and Training Deck</b>	✓	✓
<b>IEP Participant Starter Kit:</b> <ul style="list-style-type: none"><li>• IEP Fundamentals Fieldwork Guide</li><li>• IEP Personal Integration Map + IEP Sheet</li></ul>	20  50 Total (includes IEP-T kits)	30
<b>IEP Proprietary Tools</b>	20	20+
<b>Ability to teach/share content from IEP Fundamentals Course and lead the (pure) IEP Fundamentals course</b>	✓  (inside your organization +/or w/1:1 clients)	✓  (with more than one organization + w/1:1 clients)
<b>IEP Stewardship School Training Membership</b>	✓	✓
<b>Access to Monthly Steward Learning Lab / Q&amp;A Call (Group Sessions)</b>	✓	✓
<b>Professional Designation &amp; Certificate</b>	IEP-Trained Steward	IEP-Certified Steward (after successful completion)
<b>IEP Starter Kit Bundle Print Licenses for Participants:</b> <ul style="list-style-type: none"><li>• IEP Fieldwork Guide</li><li>• IEP Personal Integration Map + IEP Sheet</li></ul>	\$20/person	\$20/person (Includes CIM too)
<b>IEP School Membership for Clients</b>	see pricing page	see pricing page
<b>IEP Public Program Discount for you and your clients/org</b>	10%	20%

# QUICK REFERENCE STEWARDSHIP LEVELS

	<b>Level 1 Basic: IEP-Trained Steward</b>	<b>Level 2: IEP-Certified Steward</b>
<b>Two 90-Minute Private Strategy Sessions &amp; Certification timeline/plan</b>		✓
<b>Biz of Stewardship Virtual Care Package (sample proposal and other BoS tools)</b>		✓
<b>Access to Four Quarterly Virtual Live Learning Labs (QL3s)</b>	✓	✓
<b>Monthly Biz of Stewardship (BoS) Certification Call</b>		✓
<b>Investment – Year 1 (when paid in full, add \$500 for plan)</b>	\$7,500/Steward (Phase 1, Months 1-3) (Phase 2, Months 4-12 bonus)	\$14,000/Steward/Total (\$7,500 IEP-T + \$6,500 IEP-C)
<b>Post Training &amp; Certification Recurring Membership Fee</b>	\$3K/Steward/Year OR \$900/Steward/Quarter (Months 13+)	\$5K/Steward/Year OR \$1,500/Steward/Quarter (once certified, begins after successful exam completion)

And there you have it! We hope you love it. Everything on these pages is a reflection of past cohorts, client and Steward feedback, and our own intuition and wisdom in what sets Stewards up best to be in this work with us. If it resonates, we'd love to have you join the team.

Is Stewardship for You? Do you want to become IEP-Trained and bring this to your organization and/or 1:1 clients? Would you like to take it further and become IEP-Certified so you can bring it to multiple organizations and clients? Great. Let's get you rolling.

## Option 1

If you know this is for you and you're ready to go, you can register directly for the IEP-Trained Steward Track at <http://tinyurl.com/stewardnow>.

## Option 2

If you have questions, are ready to move into Certification, or would like to schedule a call with Anese to explore Stewardship and which track is right for you, please contact Sandy to schedule a call and get started on the application process.

As always, the first step is to **decide**. Look forward to being with you on the path, Let's go!

Email us: [Info@AneseCavanaugh.com](mailto:Info@AneseCavanaugh.com)

Call us: (877) 994-3273

Join us on FB: [AneseCavanaugh](#) & [The IEP Method](#)

Follow us on Twitter: [@AneseCavanaugh](#) & [@IEPMETHOD](#)

The IEP Stewardship Program is an Active Choices, Inc. Program.

All info can be found at [www.AneseCavanaugh.com](http://www.AneseCavanaugh.com) and [www.IEPMETHOD.com](http://www.IEPMETHOD.com)

## FAQs

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### What are the four levels of engagement with the IEP Content that enable me to learn this material?

-- **IEP-C/Certified:** Teach the IEP Fundamentals and coach content w/multiple organizations & clients. Stewardship training, certification, and ongoing membership required (afterward) to maintain certification. This program is intended for people who want to achieve the highest level of mastery with the IEP content possible, for independent practitioners who want to add the IEP Fundamentals to their business offerings, and/or for IEP-Trained Stewards who want to lead this content with multiple organizations, divisions, and clients. You are eligible to apply for Certification six months into IEP-Training. You must maintain designation as IEP-C and active membership in the Stewardship Community in order to continue to teach the IEP Fundamentals in the world. IEP-T and IEP-C are ONLY levels trained/licensed to teach the IEP Fundamentals.

-- **IEP-T/Trained:** Teach the IEP Fundamentals within your sponsoring organization (ONE) and coach content w/your 1:1 clients. Stewardship Training and ongoing membership in the IEP Stewardship Community is required afterward to be able to continue teaching the official IEP Fundamentals. This program is intended for people who want to bring the IEP Fundamentals INTO their own organization, make it fit for their culture, and provide the training internally. All info on benefits and components, for both IEP-T and IEP-C, are in the IEP Stewardship Program Overview.

-- **IEP-A/Activator:** New program option we are releasing in Q1 of 2019. This program does not enable you to teach the IEP Fundamentals, however does provide membership in IEP School privileges (see next) WITH a special IEP Basics Module "Activating IEP in Your Organization" and a toolkit of handouts to support the work. This program is intended for the individual who wants to work 1:1 with clients on the IEP content, and/or share content within his/her organization, but NOT teach the IEP Fundamentals and get the breadth of training, tools, resources, and experience that comes with the full IEP Stewardship Training. This is a one time fee (\$2,500) with the option to participate in Monthly Community Calls AND a Quarterly Activators Only call (Membership \$1,000/year OR \$300/quarter.)

-- **IEP-School:** 100% self-paced engagement with the IEP Method and IEP Leadership Modules. IEP-School is meant for the individual who wants to learn this content independently for their own development, use it for a study group with his or her team (with discounted team rates for additional seats/modules), or as supporting content for Stewardship. One-time enrollment. Option to upgrade to an Annual Membership that includes monthly community calls and extra goods (\$1,000/year OR \$300/quarter.)

### What is the coaching component of IEP Stewardship?

We will be doing a bonus Learning Lab on IEP Coaching Skills in May 2019 for IEP-Stewards, IEP-T or IEP-C. Stewards with current membership (and in training) will be able to attend for free. This is to support and expand the 1:1 coaching component of the Stewardship Program.

### Once I'm done with Stewardship Training (and/or Certification), what happens?

You move into Annual (or Quarterly) Membership (@Month 13 for IEP-T or after certification completes for IEP-C.)

**What do I get with my monthly Stewardship Membership once I'm done with Training and/or Certification?** Ongoing access to all on-line materials and platform, rights to use deck and materials, continued IEP-T or IEP-C designation, right to teach Fundamentals, etc. (See overview for more.)

**Can I continue to teach the Fundamentals if I am not an active member of the Stewardship Community?**

NO. We've found that with this content, it is essential that Stewards leading sessions are up to speed on the content and actively practicing their own IEP as well as follow specific guidelines of the training (which up-level frequently) to ensure a quality consistent and magical experience for participants. Therefore, you must be current on learning and training to lead the IEP Fundamentals. Thank you for understanding. This is a part of our commitment to Quality Expansion (not control), consistency, nuance magic, and ensuring that the content grows with you and is shared with all the latest and greatest out in the world.

**What if I want to stop my membership as IEP-T or IEP-C Steward, and just want to work 1:1 or use the content learned in Stewardship (but not teach the IEP Fundamentals) then what?** If you, as an IEP-Steward, decide to stop actively engaging in IEP-Stewardship Program/Community, you can either exit the program entirely -- and no longer teach the content as Steward. OR you can drop down to IEP-Activator status for \$1K, get access to the Activation Program with the special Activation Module and tools (which are different than IEP Stewardship content and will be supported by your original training as Steward.) And, if you wish to continue with live engagement and support, you are welcome to join the IEP Community at \$1,000/year or \$300/quarter fee.

Without active participation in Stewardship, you will no longer be able to teach the official IEP Fundamentals BUT you will still be able to work with people on the content in your organization from the IEP-Activator Program. The bonus of going from IEP-C or IEP-T to IEP-A is that you will be an excellent Activator due to your expertise and training.

**Can I come back as Steward if I want to reactivate?** Yes. If you, and/or your organization decide to continue to offer the IEP Fundamentals proper, you can join back as a Steward at anytime (for the regular Annual/Quarterly Stewardship Membership), within one year. If you are out of Stewardship for longer than one year, you will need to retake Stewardship Training.

**What are the optional calls for Activators?** The Activator program and IEP School are both self-paced. The optional membership gives you access to Monthly Q&A calls with Anese for content and to get your Qs answered on integration either personally or as an Activator. We'll address a topic each month. For Activators, we've added quarterly ACTIVATOR calls on HOW to activate in your organization and with your clients. All calls are 1-hour and recorded for ease/convenience.

**When is the IEP-Activator program happening and what will it include?** This program will launch Q1 of 2019. It will include IEP School, a special "Activating IEP in Your Organization" Module with video, fieldwork guide, and toolkit, and the Monthly IEP Beat. It will not have any LIVE programming unless you decide to participate in the IEP Community Calls which include Quarterly Activator-only calls with your membership. Special Note: For the people who attend IEP Live! in October, 2018, we are opening the program early as a special... "thing."

**As an Activator, which tools do I get?**

Ask us for a grid to learn more. Regardless of what you do, IEP-A, IEP-T, or IEP-C, we encourage you participate in baseline Level 1 Stewardship Training to strengthen your foundation, your skills, your own IEP, and to become the best darn IEP-A, IEP-T, or IEP-C out there!

We're building a mighty crew. Join us?