



## **CREDENTIAL MAINTENANCE**

### **Guidance Document for ENV SP credential holders**

This guidance document contains important information for maintaining the Envision Sustainability Professional (ENV SP) credential.

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# 1 INTRODUCTION

Congratulations on your decision to maintain your Envision Sustainability Professional (ENV SP) credential. This is an important step in your career as it bolsters your credibility in the sustainable infrastructure sector.

Maintaining an active credential ensures your knowledge of the latest sustainability practices, demonstrates your continued relevance to the field of sustainability, and strengthens the value of the Envision Sustainability Professional (ENV SP) credential.

This guide is intended to lead you through the process of maintaining your credential as recognized and supported by the Institute for Sustainable Infrastructure (ISI).

# 2 ENV SP CREDENTIAL MAINTENANCE

Every ENV SP must pursue credential maintenance annually and fulfill the requirements described in this document. Refer to Policy 2.2.1.

## 2.1 REPORTING PERIOD

Upon successful completion of the ENV SP exam, credentials are active for one year. Credentials are then maintained in 1-year cycles, or reporting periods, starting on the first anniversary of when the credential is earned (based on exam) and ending 1 year from the start date.

**Table 1: Reporting Period Example**

Exam date	Reporting period start date	Reporting period end date	Next reporting period start date	Next reporting period end date
August 15, 2019	August 15, 2020	August 14, 2021	August 15, 2021	August 14, 2021

### ***Onboarding***

Professionals that earned their credential under the Envision v2 framework ***on or after*** January 1, 2018 will be rolled into the credential maintenance program automatically, and the first year’s renewal fee will be waived. These recently credentialed ENV SPs will have access to all Envision v3 online training models as well as 2 hours of Envision v3 introductory courses. They will be required to complete the 2 hours of Envision v3 introduction content before the first anniversary of earning their credential.

Professionals that earned their credential under the Envision v2 framework ***before*** January 1, 2018 will be asked to recommit to their credential by enrolling in the credential maintenance program by

December 31, 2018. Successful enrollment includes payment of the full annual renewal fee. Once enrolled, professionals will have access to all Envision v3 online training modules as well as 2 hours of Envision v3 introduction courses. These professionals will be required to fulfill 7 education hours before the first anniversary of their enrollment date. They will be required to complete the 2 hours of Envision v3 introduction content before the first anniversary of earning their credential; additionally, in order to comprise the remaining 5 required education hours, they may complete any of the Envision v3 online training modules.

**Table 2: Reporting Period Example for Onboarding**

Exam date	Reporting period start date	Reporting period end date	Next reporting period start date	Next reporting period end date
May 15, 2018	May 15, 2018	May 14, 2019	May 15, 2019	May 14, 2020
August 15, 2012	November 15, 2018 (upon enrollment, no later than December 31, 2018)	November 14, 2019	November 15, 2019	November 14, 2020

## 2.2 CREDENTIAL MAINTENANCE REQUIREMENTS

The table below outlines the credential maintenance education requirements and fee structure.

**Table 3: Renewal and Maintenance Requirements**

	Member (incl. individual)	Non-Member
<b>Education Requirements</b>	7 hours per reporting period <ul style="list-style-type: none"> <li>• 2 prescribed by ISI</li> <li>• 5 user's choice</li> </ul>	7 hours per reporting period <ul style="list-style-type: none"> <li>• 2 prescribed by ISI</li> <li>• 5 user's choice</li> </ul>
<b>Renewal Fee</b>	\$50 per reporting period Includes \$50 "Continuing Education credit" covering the 2 courses prescribed by ISI plus 3 user's choice (5 courses total @ \$10 per course)	\$80 per reporting period Includes \$80 "Continuing Education credit" covering the 2 courses prescribed by ISI plus 2 user's choice. (4 courses total @ \$20 per course)
<b>Additional Course Fees</b>	\$10/course	\$20/course

### ***Education requirements***

All ENV SPs are required to complete a total of 7 education hours annually as a part of their credential maintenance. This education requirement is broken down into ISI prescribed courses and user's choice activities.

*ISI prescribed courses*

ISI will create and prescribe 2 hours of content annually that ENV SPs will complete as a part of their education requirements. Based on the renewal fee paid, ISI prescribed courses will automatically be “purchased” using a credential-holder’s “Continuing Education credit”. ISI prescribed courses will then be accessible via the ENV SP’s account.

*User’s choice*

To fulfill the remaining 5 education hours, ENV SPs may select from a range of activities to complete. Among the choices are additional ISI continuing education courses offered through the ISI website. These ISI continuing education courses may be purchased using Continuing Education credit or “a la carte”. Other activities that qualify for fulfillment of the remaining 5 education hours include:

- participating in additional ISI training (verifier or trainer),
- facilitating Envision workshops, verifying Envision projects,
- working on Envision projects,
- authoring articles on Envision and sustainable infrastructure, or
- volunteering on an ISI board, committee, or workgroup.

Full details on qualifying activities are provided in the Section 4.

Education hours must be earned in the reporting period for which they are acknowledged. For example: facilitating an Envision workshop on January 1, 2019 *cannot* support education hours earned for a reporting period that begins August 1<sup>st</sup>, 2019.

Any education hours earned above and beyond the 7-hour requirement will *not* be rolled over to subsequent reporting periods. Any user’s choice education hours that are earned above and beyond the 5 hours allotted per reporting period will not replace or be used as a substitute for the 2 education hours required as ISI prescribed courses.

**Fees**

Renewal fees are due on the start date of each reporting period. Fees may be paid in advance; however, the reporting period start and end dates will not change. Renewal fees are paid for the upcoming year (not for the past year) and cover the ENV SP’s participation in the credential maintenance program for that year.

Credential maintenance fees are waived for full-time students and faculty; however, students and faculty must fulfill the education requirements.

Note that an ENV SP credential is not synonymous with ISI membership; ENV SPs that are not affiliated with a corporate, governmental, academic, or organizational account may become individual members.

*Continuing Education Credit/Balance*

The renewal fee includes Continuing Education credits to purchase education courses from the ISI website at the discretion of the credential holder. ISI courses will be available for purchase at a rate of \$10/course (\$20/course for non-members). The ENV SP receives credit to purchase these courses in the amount of the renewal fee paid.

- For members, when a renewal fee of \$50 is paid, the ENV SP earns \$50 in credit toward courses; at \$10 each, the ENV SP therefore has enough credit to purchase 5 courses.
- For non-members, when a renewal fee of \$80 is paid, the ENV SP earns \$80 in credit toward courses; at \$20 each, the ENV SP therefore has enough credit to purchase 4 courses.

The amount of Continuing Education credit is shown as a dollar value in the credential holders account under “Continuing Education Balance”. This balance can be found on the individual’s Dashboard and on the Education tab.

Continuing Education credit may only be used to purchase ISI prescribed courses and other ISI continuing education courses. Continuing Education credit may not be allocated to another account-holder. Accrued Continuing Education credit may not be used to pay for training, project registration or verification fees.

## 3 RENEWING YOUR CREDENTIAL

Renewing your credential requires 2 parts:

1. Completing the required education hours, and
2. Submitting the renewal fee.

Education hours are due at the end of the reporting period while renewal fees are due at the beginning of the subsequent reporting period; both hours and fees may be submitted on the same day (i.e. the last day of the reporting period).

### 3.1 COMPLETING EDUCATION HOURS

ENV SPs are required to complete 7 hours of education annually. Two of these 7 hours will be prescribed by ISI and required during each reporting period. The remaining 5 hours may be comprised of ISI continuing education courses or other qualifying activities (see Section 4 on “Acceptable Activities for earning Hours”.)

All 7 hours are to be completed, reported, and submitted by the last day of the reporting period. When the ENV SP has accrued enough education hours, they will “submit” their full report via their online credential maintenance portal found in their ISI account.

#### ***Self-reported hours***

An ENV SP wishing to earn education hours for any activities not tracked by ISI (ISI prescribed hours or ISI continuing education courses) will be required to self-report all additional hours in order to complete their annual credential maintenance. Activities should be relevant to ISI, Envision, or sustainable infrastructure. Acceptable activities are detailed in Section 4.

ENV SPs should use the self-report form accessible via their accounts to track and submit education hours. All fields on the self-report form are required for approval, including supplemental documentation that supports the self-reported activity. Suggested supporting documentation can be found in the description of each acceptable activity as detailed in Section 4.

All self-reported hours are subject to ISI review, and will be marked “pending” until approved. ENV SPs may not submit their full report of education hours for renewal with individual education hours pending review. In the event that ISI declines a self-reported hour, the ENV SP shall have until the end of their reporting period to complete all required hours. No credential maintenance extensions will be granted in order to make up hours that were declined.

### **3.2 SUBMITTING THE RENEWAL FEE**

Renewal fees will be accepted via online payment and are due on the first day of the reporting period. The renewal fee covers the upcoming year’s participation in the credential maintenance program as an active ENV SP.

## 4 ACCEPTABLE ACTIVITIES FOR EARNING HOURS

**Table 4: Education Hours Activity Summary**

Activity	Required	Automatically tracked	Self-reported	Education hours
<b>Education</b>				
ISI prescribed courses	X	X		1 education hour/hour of education
Additional ISI courses		X		1 education hour/hour of education
General coursework on sustainable infrastructure			X	1 education hour/hour of education
University coursework on sustainable infrastructure			X	1 education hour/credit-hour
<b>ISI Trainers</b>				
Train the Trainer			X	5 education hours/course
In-person workshops (Lead Trainer)			X	5 education hours/workshop
<b>ISI Verifiers</b>				
Verifier Training			X	5 education hours/course
Project Verification (assigned verifier)			X	5 education hours/project
Envision Project Participation			X	Up to 5 education hours/project
Authorship			X	Up to 3 education hours/article
Volunteering			X	Up to 5 education hours/volunteer position held

### 4.1 EDUCATION

Education should be relevant to sustainable infrastructure and in the form of prescribed courses and continuing education courses delivered by ISI or self-reported courses and presentations. Both participants and instructors receive 1 education hour per hour of education. Instructors who

participated in the development of course content can earn 1 additional hour of education per hour of content.

*ISI prescribed courses*

ISI will create and require 2 courses annually; the 2 courses will comprise 2 education hours (i.e. 1 education hour/ hour of education). Completion of the 2 “prescribed” education hours will be required during each reporting period to renew the credential. All ISI prescribed content will be available on the ISI website as on-demand e-learning modules or webinars. Hours will be tracked automatically; the credential holder will not have to self-report these hours.

*ISI continuing education courses*

Additional courses will be available on the ISI website for credential maintenance. Participation in these courses is at the credential holder’s discretion. These courses qualify as “user’s choice”. Completion of each course will be tracked automatically and hours will be awarded to the credential holder’s credential maintenance progress. The credential holder will not have to self-report these hours.

*General coursework on sustainable infrastructure*

Credential holders are at liberty to take additional courses on sustainable infrastructure that are not found on the ISI website. These courses are taken at the discretion of the credential holder.

Hours are not tracked automatically; all general sustainable infrastructure courses must be self-reported and are subject to ISI approval. Certificates of completion should be provided as supporting documentation.

*University coursework on sustainable infrastructure*

Part-time and full-time students and faculty are at liberty to self-report courses taken or taught during the semester that focus on sustainable infrastructure. Education hours are awarded per credit-hour, not per hour of education.

Hours are not tracked automatically; all university coursework on sustainable infrastructure must be self-reported and is subject to ISI approval. The course syllabus and any final indication of completion (transcript, etc.) should be submitted as supporting documentation.

## **4.2 ISI TRAINERS**

Approved ISI trainers are eligible to receive continuing education hours for facilitation of training events.

*Train the Trainer*

New trainers may receive education hours for the completion of the Train the Trainer course. A maximum of 5 education hours will be awarded for completion of the Train the Trainer Course.

These hours are self-reported and subject to ISI approval. ISI may confirm participation via the course roster/sign-in sheet.

*Workshop facilitation*

Approved ISI trainers are eligible to receive education hours for facilitating in-person Envision workshops. Lead trainers may receive a maximum of 5 education hours per workshop. Any supporting co-trainers may receive 1 education hour per hour presented during the workshop.

In order to receive education hours for conducting workshops, trainers must self-report hours. Self-reported hours are subject to ISI approval and each trainer/co-trainer must be affiliated with the workshop on the ISI website in order to receive education hours. ISI will confirm participation based on the online workshop management portal.

### **4.3 ISI VERIFIERS**

Approved ISI Verifiers are eligible to receive continuing education hours for their participation in verifying projects.

*Verifier Training*

New Verifiers may receive education hours for the completion of the Verifier Training. A maximum of 5 education hours will be awarded for completion of the Verifier Training.

These hours are self-reported and subject to ISI approval. ISI will confirm participation based on the course roster/sign-in sheet.

*Project Verification*

Verifiers are eligible to receive education hours for facilitating in-person Envision workshops. Verifiers may receive a maximum of 5 education hours per project. Only the assigned Verifier may claim education hours for project verification and verifiers must self-report hours.

Self-reported hours are subject to ISI approval and the verifier must be assigned to the project in order to receive education hours. ISI will confirm participation based on the verifier assigned to the project on the ISI website.

### **4.4 ENVISION PROJECT PARTICIPATION**

Work on a project registered for Envision verification will count for up to 5 education hours per project. In order to be eligible for project participation hours, each credential holder should be associated with a *registered* project on the ISI website. Only work completed after a project is registered or during the verification phase will contribute to an ENV SPs continuing education hours. Work completed before a project is registered does not contribute to an ENV SPs continuing education hours. If work on an Envision project from registration through completed verification spans more than one reporting period, the ENV SP may self-report hours for one project on multiple consecutive reporting periods.

Project participation education hours are self-reported and confirmed by ISI through the project database on the ISI website. The number of hours an ENV SP self-reports should be commensurate with the work completed on the project. For example, an Envision Project Lead may self-report 5

education hours per project, while an ENV SP who only provided one-time consultation on one Envision credit should only self-report 1 education hour. Additionally, suggested supporting documentation includes a letter from the Envision Project Lead attesting to project members' participation on a project.

#### **4.5 AUTHORSHIP**

Authorship includes credited contributions to a print or digital publication and is worth up to 3 education hours for published article. Articles should be relevant to Envision and sustainable infrastructure. With the exception of contributions made to the ISI website blog, blog posts and other unsubstantiated digital media will not contribute to credential maintenance.

All authorship hours are self-reported and subject to approval by ISI. Suggested supporting documentation includes the published article itself, or at a minimum the first page, with publication and by-line details.

#### **4.6 VOLUNTEERING**

Volunteering includes participation on ISI's committees or working groups. Acceptable activities include attending meetings, planning events, performing research and engaging in governance, among others. Participation on a non-ISI committee does not contribute to continuing education hours. For example, actively participating on a local chapter sustainability committee does not contribute to education hours.

Volunteers can claim up to 5 hours per active volunteer position held during the reporting period. The number of hours an ENV SP self-reports should be commensurate with the activities completed as a volunteer. For example, members of a volunteer committee that meets monthly and was responsible for a particular work product may self-report 5 education hours. Members of a less active committee, or less active members of a committee should only report 1-2 education hours. All volunteer hours are self-reported and subject to approval by ISI. Supporting documentation may include meeting minutes or completed work products.

## **5 POLICIES**

All credential maintenance policies are contained within Appendix A for ease of reference. Note that these policies might be updated and expanded from time to time. The latest ISI Policies document is available for download from the ISI website. If you previously downloaded a copy of this document or the ISI Policies document, be sure to check the website often for updates as the latest versions. These policies should be reviewed in conjunction with this larger document.

## 6 DEFINITIONS

**Education hour** – a measure of an activity that contributes to an ENV SP’s credential maintenance. One education hour does not always correlate to one hour of time spent on an activity. Activities and their earned education hours are provided in Section 4.

**ISI prescribed courses** – courses that are created by ISI and required for the continued maintenance of the ENV SP credential. The ENV SP is required to complete 2 education hours of ISI prescribed courses per reporting period.

**Active** – the status of an ENV SP who is participating in credential maintenance and is in good standing.

**Inactive** – the status associated with an ENV SP whose credential maintenance has lapsed.

**Self-reported** – activities that are not created and tracked automatically by ISI should be reported by the ENV SP to earn hours for credential maintenance

**User’s choice** – designates education hours that are not prescribed by ISI. A list of user’s choice activities and their earned education hours are provided in Section 4.

**Continuing Education credit** – each paid renewal fee supports the “purchase” of additional education content from ISI’s website with “Continuing Education credit” allocated to each ENV SP’s account based on the membership fee paid. This type of credit has a dollar value.

## APPENDIX A - CREDENTIALING POLICIES

*[Excerpt from ISI policy document – reference website for latest version / full set]*

### 2.0 CREDENTIALING

#### 2.1 ENVISION SUSTAINABILITY PROFESSIONAL CREDENTIAL

##### 2.1.1 Envision Sustainability Professional Credential Requirements and Prerequisites *[Issued 2012, Updated 2018-10-01]*

To become an Envision Sustainability Professional (ENV SP), an individual must take ISI's official ENV SP training either online or in-person by an Approved ISI Trainer and pass an online exam. An ENV SP must remain in good standing through the ongoing credential maintenance. There are no other requirements or minimum qualifications to become an ENV SP.

##### 2.1.2 Credential Exam *[Issued 2018-10-01]*

The exam may be attempted up to three (3) times. Once an exam has started, it must be completed within 72 consecutive hours. The exam is open book and is comprised of multiple-choice questions. A passing grade is 75%.

If a passing grade is not earned after three exam attempts, the ENV SP training must be retaken, and all

#### 2.2 CREDENTIAL MAINTENANCE

##### 2.2.1 Inactivation of ENV SP Credential *[Issued 2018-10-01]*

The ENV SP credential is valid for 1 year. On the first anniversary of earning the credential, credential maintenance begins. If the credential is not maintained per the required renewal fees and completion of education hours, the credential expires. Credential holders will be listed as "inactive" on the ISI website, and may no longer use the "ENV SP" designation.

##### 2.2.2 Renewal Fees *[Issued 2018-10-01]*

Envision Sustainability Professionals are responsible for the renewal fee at the beginning of the reporting period. Payments will be accepted only in US dollars and will be accepted by credit/debit card via the ISI website. Submitted payments cover renewal of the credential for the coming year. For example, if a renewal fee is submitted on time, on the first day of the reporting period, on June 1, 2020, the credential is active until May 31, 2021. During this 1-year period the ENV SP has access to required credential maintenance courses and "Continuing Education credit".

##### 2.2.3 Continuing Education Credit *[Issued 2018-10-01]*

Each paid renewal fee supports the purchase of continuing education content from ISI's website. ENV SPs are allocated an amount of "Continuing Education credit" in the amount paid for renewal (i.e. members pay a \$50 renewal fee and receive \$50 Continuing Education credit; non-members pay an \$80 renewal fee and receive \$80 Continuing Education credit). For each renewal period, an ENV SP's Continuing Education credit is automatically used to purchase the ISI prescribed courses. Any remaining credit may be used at the ENV SP's discretion. The amount of Continuing Education credit is shown as a dollar value in the credential holders account under "Continuing Education Balance". This balance can be found on the individual's Dashboard and on the Education tab.

Continuing Education credit will "roll-over" from year to year and will not expire. Continuing Education credit cannot be re-allocated to other users. Continuing Education credit can only be used to purchase ISI prescribed content or other continuing education modules. Continuing Education credit cannot be used to purchase any of the following, including, but not limited to: registration or verification fees; credential training (online or in-person);

exams; credential maintenance renewal fees.

**2.2.4 Past Due** *[Issued 2018-10-01]*

Credential holders will have a 6-month grace period in which to renew their credential, which starts after the reporting period has ended. While you will be able to earn hours during this time, your reporting period does not change.

For example, if your renewal period is June 1, 2020 – May 31, 2021, you will be past due on June 1, 2021. Your grace period will be June 1, 2021 – November 30, 2021. If you renew any time within the 6-month grace period, your reporting period remains the same. Your next reporting period will be June 1, 2021 – June 1, 2022; all renewal fees and hours will be due on June 1 regardless of when your last renewal was submitted. If you don't report enough hours and successfully renew by the end of the grace period, your credential will be rendered "inactive".

*Example Reporting Period with Grace Period*

Reporting period start date	Reporting period end date	Grace period end date	Next reporting period start date	Next reporting period end date
June 1, 2020	May 31, 2021	November 30, 2021	June 1, 2021	May 31, 2021

**2.2.5 Self-Reported Hour Reviews** *[Issued 2018-10-01]*

All self-reported hours are subject to ISI approval. Self-reported hours will display as "pending" for a maximum of 2 weeks (14 days) while ISI review is occurring.

**2.2.6 Failure to Comply** *[Issued 2018-10-01]*

Each Envision Sustainability Professional is responsible for demonstrating full compliance with credential maintenance guidelines. Unsupported, misstated, or fraudulent reporting of education hours is cause for action by ISI and may be grounds for disciplinary action, up to and including revocation of the ENV SP credential.

Failure to fulfill and/or report the required education hours for the credential maintenance reporting period will result in inactivation of the Envision credential. Failure to submit the required renewal fee for the credential maintenance reporting period will result in inactivation of the Envision credential.

**2.2.7 Waivers/Extensions** *[Issued 2018-10-01]*

If unforeseen circumstances prevent you from being able to complete your credential maintenance in your 1-year reporting period, you may request a waiver or extension. Situations that could be recognized by ISI as warranting a waiver or extension include: long term unemployment; military deployment; or health problems. This list is not exhaustive nor do these circumstances guarantee a waiver or extension. Written requests must be received at least 30 days before the end of your reporting period. ISI reviews requests on a case-by-case basis and only grants waivers or extensions in situations where you were prevented from completing your credential maintenance.

**2.2.8 Reinstatement** *[Issued 2018-10-01]*

To regain a credential after expiration, one must apply, register, train and retest as a new candidate. Such individuals are responsible for all applicable fees.

**2.2.9 Maintenance Renewal Closure** *[Issued 2018-10-01]*

ISI retains the right to close the credential maintenance portal and course library at any time, for any reason, and without notice. The closure of the portal means that no education hours may be tracked, and no renewals may be submitted.