

Process for Certification to Teach Clear Leadership

Clear Learning Ltd.

3898 Trenton Place
North Vancouver, BC
Canada V7R 3G5
(604) 986-1819
info@clearlearning.ca
www.clearlearning.ca



The purpose of the certification process is to ensure that everyone certified to teach the Clear Leadership course:

- Can model the Clear Leadership skills.
- Can explain all facets of the clear leadership model and associated skills in clear, simple ways.
- Can coach participants to learn the skills during the course in a way that helps them step outside their comfort zones while maintaining their dignity.

Applicants wishing to become certified to teach the Clear Leadership course must meet the minimum requirements for trainer competence found on the Clear Learning Ltd. website and described on the following pages.

Applicants for certification must complete the following, in the following order:

1. Participate in a Clear Leadership Course or Lab run by a certified instructor.
2. Complete the Training for Trainers course.
3. Participate as co-leaders on one or more Clear Leadership courses, under supervision of approved Clear Leadership certification examiners, as many times as necessary to become fully competent to teach the course.

Applicants for certification should contact Clear Learning Ltd. to declare their intent to seek certification as early in the process as possible (info@clearlearning.ca). Although this is not a requirement, applicants for certification should sign a contract with Clear Learning Ltd. prior to step 1, taking the Clear Leadership course. This will allow them to purchase the Clear Leadership Instructor's Guide from Clear Learning Ltd., which they can study while taking the course.

Applicants must sign such a contract before step 2, Training for Trainers.

Applicants must make their own arrangements to teach Clear Leadership courses under supervision of approved examiners (step 3). This can be done by helping to facilitate any Clear Leadership course being run by others, or by mounting courses in their own institutions. Any fees associated with this part of the certification should be negotiated in advance with the examiners.

Approved Clear Leadership certification examiners in BC and Alberta:

Gervase Bushe, Terri Chyzowski, Gabi Cuff, Lynda Fernyhough, Terrie Klotz, Cathryn Lecorre, Helen Lingham, Marilyn Mahoney, Sasja Nieu Kirk, Ann Ovstaas, Michele Radomski, Marty Rosen, Barb Smith, Marjorie Warkentin.

Clear Leadership Certification

Stage 3

This document is intended to clarify the Clear Leadership certification process and competencies for both those seeking certification to teach Clear Leadership after completing Training for Trainers (candidates), and those licensed to assess candidates for certification. Only Clear Learning Ltd. can legally certify instructors, and does so on the recommendation of those licensed to assess others (hereafter referred to as certifying instructors, or certifiers).

Certification requires co-instructing courses with certified instructors, at least one of whom must be a certifying instructor. The candidate must understand that the primary concern for course instructors is the learning experience of the course participants. Course instructors will make decisions about how the candidate will participate as an instructor based on their judgments about the candidate's readiness to meet the needs of participants.

Certifying Instructors are not obligated to provide their services to anyone and candidates must negotiate their own arrangements, in terms of time and fees, with certifying instructors. Certifying instructors are not obligated to help candidates overcome deficiencies or in any way "teach" them, unless this has been negotiated by the candidate and the individual certifier. Certifying instructors are, however, obligated to provide clear and understandable judgments about the candidate's competencies and skills or knowledge lacking and what is required to satisfy certification requirements.

Candidates who choose to work with more than one certifying instructor must make both certifiers aware of this and describe any feedback they have received from any certifying instructor to any other certifier they work with.

Descriptions of key competencies required for certification to teach Clear Leadership, beyond simply understanding the course content, are made available to all candidates prior to attending Training for Trainers. While an attempt will be made to identify key deficiencies during Training for Trainers, there is no policing mechanism and it is up to those providing certification to decide whether they believe the candidate possesses the basic skills necessary to allow them in the classroom. A lack of competence in any of the following three areas may make a certifier unwilling to have a candidate participate as an instructor in their courses.

Training experience: if the candidate has not had prior trainer experience (particularly the ability to lecture about concepts and skills in highly engaging ways) they should take courses designed to teach "stand-up trainer" skills.

Facilitation and coaching experience: if the candidate has not had prior experience coaching others and helping others learn from their experience, they should take other training designed to teach coaching and facilitation skills.

Living the skills: if the candidate has difficulty "walking the talk" of Clear Leadership, they should take personal growth and self awareness courses and consider personal counseling. Courses and counseling focused on increasing here and now awareness of experience, communicative competence and managing personal reactivity are the most appropriate.

Areas for Assessment By Certifiers

The primary judgment that all certifying instructors must make in order to recommend someone for certification is “would I hire this person to run a course?” It must be understood that each candidate comes with different backgrounds, experiences, strengths and weaknesses, and no two certified instructors will have the same strengths and styles. Similarly, not every issue that might make it difficult for a certifier to recommend certification can be identified in advance. The following identifies areas of competence all candidates will be assessed on, but does not necessarily cover all areas an individual candidate may require improvement in order to be certified, nor is mastery of every area necessarily required of a certified instructor. It is the entirety of the candidate that must be taken into account when answering the question, “would I hire this person to teach a course?”

Content Expertise.

In order to be certified candidates must demonstrate a strong grasp of the key concepts in the course. In addition to the skills associated with each of the four selves, this includes the concepts of experience, sense-making, interpersonal mush, interpersonal clarity, fusion, disconnection, self-differentiation, the interpersonal gap, working pinches, triangulation, and learning conversations. Candidates must understand the centrality of the ideas of partnership and leading learning in the Clear Leadership model.

Content expertise goes beyond being able to recite the models from the book and requires a personal grasp of the meaning of each concept and skill. Candidates should be able to respond to questions and further clarify key concepts by, for example, providing personal stories that illustrate key points and describing other models or research that help explain or extend key concepts.

Content expertise also goes beyond simply understanding the concepts to living the concepts. Candidates must show that they are incorporating the skills and perspectives of Clear Leadership and build partnerships with the instructors and participants. While living the skills of Clear Leadership can be a lifetime’s journey to master, the key is “being a learner” – being aware of and willing to describe one’s here and now experience, a willingness to take responsibility for one’s own experience, an ability to describe one’s experience without judgment, a curiosity about one’s impact on others without getting fused; an ability to notice one’s own reactivity and be able to park it, and a willingness to be open to other perspectives and points of view.

Trainer Competencies.

Certified instructors are expected to be able to manage the learning process for participants. The candidate should demonstrate that s/he can present content, manage the learning process, and maintain emotional support for the course participants. This includes being a good lecturer, being able to field questions, guide participants through exercises, manage resistance, and support the vulnerability that most participants experience in the learning process.

Deliver lectures that are informative and engaging. Lectures should be clarifying and aid participants to easily grasp the concepts being taught. Candidates should demonstrate an ability to explain concepts and skills in a way that keeps the audience interested and engaged.

Giving clear directions for activities. Candidates must be able to guide course participants through experiential exercises in a way that is understandable and clear. Visual prompts of the process should be incorporated (e.g. flip chart the process or by physically demonstrating the process) as needed. The candidate should ensure all participants are clear before proceeding. Before beginning timed activities, the candidate should ensure that s/he has the attention of all course participants.

Inviting discussions at the end of each lecture. Candidates should demonstrate an ability to hold space for conversations about each key concept, which implies an ability to stay with the tension that can emerge in the silences as well as when hot buttons have been pushed and resistance occurs.

Understanding and answering questions. Candidates should demonstrate an ability to hear what participants are saying, to answer the question that the participant means to ask even when they aren't doing a good job of articulating it. This requires being able to notice when participants are confused or having difficulty understanding a concept, understand the source of the confusion, and respond in a way that clears things up.

Using an Appreciative Mindset with course participants. When coaching and teaching course participants and supporting the facilitation team, the candidate should demonstrate an ability to acknowledge the positive intent of others, see and build on the best in others as well as appreciate their efforts to learn. This requires being able to correct participants without shaming them, to create a space where participants feel comfortable expressing disagreement, confusion or different points of view.

Managing time. Candidates should demonstrate an ability to keep track of time and keep the course on track so that participants have the best learning experience possible. That means being able to find ways to adapt, shorten, combine material when time needs to be made up. It also means knowing when and how to stop tangential discussions and get the group back to the course schedule.

Staying connected to the group. The candidate should demonstrate an ability to support the learning in the room as it emerges. In addition to giving eye contact and showing active listening when participants are asking questions or making comments, this also means that candidates are willing to slow the process down when participants begin to address their own obstacles and road blocks to learning and being in partnership with each other. If the candidate is unsure whether or not to stay with the learning that is emerging or to move the course forward in order to stay on time, the candidate can manage the situation by becoming transparent in the moment (e.g. I'm thinking that you are raising a very valid and important point and feel anxious about honoring your process and ensuring that we stay on time with the content. I'm going to ask my counterpart for feedback at this point as I want to learn about how to manage this in a way that serves everyone). There is an art to knowing when to stop delivering the content to address the need in the room. If the candidate is stuck, an expectation should be stated in advance that s/he communicates that to the course instructors.

Showing up congruently and consistently. The candidate must understand that being in a leadership position means that course participants will be watching him/her closely, whether they are at the front of the room or the back of the room. This means that the candidate must take extra care to adhere to the group agreements (e.g. checking their email, talking when others are talking, having the cell phone turned off). Less easy to identify, but equally important, is the need for the candidate to show up as themselves. This means allowing course participants to see the candidate's vulnerability as well as his/her strengths. It means becoming transparent when the candidate is confused or unsure and looking to the instructors for guidance and direction.

Coaching Competencies.

Certified instructors are expected to be able to help participants learn from their experience and learn how to use the skills being taught, particularly in "real" situations involving "real issues" amongst participants so that they have successful experiences of learning about themselves and using the skills. Of particular importance is the ability to coach participants during skills group.

Able to provide coaching during skills group to help participants quickly understand the learning process. Most participants find skills group bewildering at first. Candidates should be able to help participants understand how to get the most out of skills group in their demonstrations, explanations and interventions.

Able to track and fan individuals during skills group coaching sessions. Candidates should demonstrate and ability to see people “doing something right” and use coaching time between skill group sessions to fan skill use and learning.

Able to support people when they are outside their comfort zone. Candidates should be able to notice when participants are feeling vulnerable and be able to support that vulnerability in a way that aids learning. Candidates should have a repertoire of strategies and be able to use the right strategies for different personality types. For example, some people need conceptual support while others need emotional support. Some people need praise while others find it a barrier.

Able to maintain people’s dignity while they are learning hard lessons about themselves. Candidates should be able to help people feel worthy, included, and supported even when less than perfect parts of themselves are on display. Often, that means creating opportunities for the participant to realize that others are not judging them as harshly as they are judging themselves.

Able to help participants stay in connection with each other. Related to maintaining people’s dignity is helping them to increase their sense of connection with each other. Candidates should demonstrate an ability to bring people together into authentic connection with each other, as this is the key way in which psychological safety is created and maintained.

Able to intervene in ways that reframe mental maps. Candidates should demonstrate an ability to help people think about things in new ways. Often this comes from asking good questions and providing timely feedback.

Able to help people try new behaviors. Candidates should demonstrate the ability to help people try on and learn new behavior. This includes being able to provide clear directions, break complicated things down into simple steps, provide support and encouragement when it is needed, understand individual obstacles and track and fan new skill use.

Able to stay self-differentiated with participants. Candidates must be able to be connected to participants without getting fused to them. Candidates should be able to avoid taking responsibility for other people’s experience in the course while still being curious about their impact. Candidates should be able to manage their reactivity in the face of disagreement, resistance, or other ways in which participants may want to hold an instructor responsible for their own fears, anxieties or unpleasant feelings.

Certification Process

Candidates participate as instructors in courses being delivered by certifying instructors as often as required to become certified. Often there is more than one certified instructor delivering the course and a non-certifying instructor may have the lead responsibility for course delivery. The candidate must understand that the primary concern of all instructors is to the learning of the course participants, and that the needs of the candidate come second. Candidates therefore participate in a graduated way, getting more responsibility and more content to deliver based on decisions made by those responsible for delivering the course. Prior to engaging in the certification process, goals, roles and procedures should be discussed by the candidate and certifying instructor.

Set intention and goals for certification. Candidates should be thoughtful about feedback they want from the instructors they will be working with as well as how they want to show up in the room and what will help them stay focused and grounded.

Identify candidate expectations of being a learner. Candidates need to be encouraged to think about what it means to be a instructor who is learning. What are their learning maps? What expectations do they have of the course instructors and certifier? It should also be made explicit in the context of this conversation that the priority is always to the course participants. This means, for example, that

although it is alright for the candidate to make errors during lectures or coaching, the errors must be corrected in order to maintain the integrity of the learning for the course participants.

Willingness to learn. The candidate must be willing to receive feedback from course instructors, particularly the certifying instructor. The candidate should look to course instructors for guidance and direction when s/he is unsure of how to handle a given situation. When a course instructor steps in to safeguard the learning in the room, the candidate should openly receive the input.

Managing content not delivered properly. Course instructors must ensure the quality of the program and step in if the candidate is providing faulty instruction. If at any time a course instructor intervenes to correct the content or instructions being given by the candidate, the candidate should be entirely supportive of the instructor's actions. The candidate and course instructors may want to have a conversation about how they would like to handle such situations before they occur.

Presenting to colleagues. Candidates who will be teaching inside their own organizations need to acknowledge the potential for feeling vulnerable as they learn in front of the group. Prior discussions about their own competence compulsion and consequent reactivity are very useful. In this discussion, strategies about staying self-differentiated should be made explicit. For instance, becoming transparent about their own process as it emerges (e.g. I'm thinking that your question is extremely valuable to the group and I'm not sure if I can answer it adequately so want to defer to my co instructor about this) not only models the learning for the group, but indicates that the candidate has a firm grasp of the model. If they can manage this in front of the group, then they truly have integrated the concepts into their being.

Observation before engagement. Prior to presenting material for the first time, candidates should consider observing a course from a facilitation perspective. For instance, they may be given a checklist of things to watch for in terms of how the instructor manages the room, delivers content, engages participants, holds the energy, etc.

In order to ensure that candidates are ready to deliver course content and can successfully meet the needs of course participants, the delivery of content should proceed in the following stages:

Stage 1 Observe a course delivery. Candidates should follow along in the manual and prepare notes and checklists for themselves to focus their attention on the many facets involved in delivering a course. At this stage, candidates may be given simple things to do such as managing the flip charts, checking sign-in, ensuring participants have name tags, announcing logistics (breaks, facilities). Candidates who already have extensive trainer experience and a strong grasp of the material may, on the judgment of the course instructors, skip Stage 1.

Stage 2 At this stage the candidate may begin with one content piece each day, or one in the morning and one in the afternoon, to determine if the candidate is prepared to deliver, has the ability to hold the room, and understands the material. Easier content to deliver should be chosen over more difficult parts of the course. For most people the most difficult content to teach well are Day 1: Right Here, Right Now; Day 2: Impact Before Response, and Reframing Problem Patterns; Day 3: Projection, and Confronting for Insight; Day 4: Demonstrating a Learning Conversation.

Stage 3 Course delivery is shared as one might with any co-instructor so that the candidate has the opportunity to experience sharing load and supporting a co-instructor in the room. If the certifier expects to certify the candidate after this course, the candidate should do any of the most difficult content on each day that they have not presented previously.

Flow of content: although instructors are encouraged to make the course their own and deliver it in a way that matches the individual's style and preferences (as well as that of the group), for certification purposes the candidate must demonstrate that s/he can deliver the content coherently. To do this, they

should demonstrate that they can deliver the material in the instructor's manual in the suggested sequence, as there is a reason for delivering the content in the order that it is written.

The following suggestions not only supports the candidate in their learning, but also allows instructors to maintain the psychological safety needed in skills group for participants to step outside their comfort zones and experience developmental learning.

Observe first: during stage one of the process, the candidate is encouraged to note what interventions instructors make and when but not to intervene during skills group sessions. The candidate can provide coaching to participants during the coaching breaks between skills group sessions. At the end of each day, the candidate may be invited to share his/her observations with the certifier and discuss the motivation behind each intervention.

Tracking and fanning: the candidate should be encouraged to track specific skills being used in the group by the participants and fan those skills during the debriefs in order to maximize learning of the participants and the candidate.

In addition to learning how to present the material cohesively and clearly, the candidate must also demonstrate an ability to support colleagues they are instructing with. Having a discussion with the candidate about the following considerations can help that process.

Cheering on the other instructors. The support of a co-instructor is invaluable. Paying attention to what is being delivered, and nodding and smiling, can be very encouraging to the instructor at the front of the room.

Noticing the energy in the room. Sometimes the instructor is very focused on delivering the content and may not notice when they are losing the group. The co-instructor is in an ideal position to track how the room is responding and can support the instructor by stepping in when s/he thinks a point may be missed or when a personal story may enhance the learning in the room.

Being present and aware. Although some checking of notes in advance of delivering content is to be expected, the candidate should not be spending all of his/her time when s/he is not in the front of the room preparing to deliver his/her next piece of content. Rather, the candidate needs to remain present and aware of the discussions that are taking place and how the content is landing on the group participants.

Checking about leaving the room. Before leaving the room during a course, the candidate should check in with the co-instructor to ensure that s/he is not needed at that given moment and should also let his/her partner know how long s/he will be out of the room.

Completion

At the end of each course the certifying instructor should meet with the candidate to discuss those areas the certifier feels the candidate is competent and those areas where the candidate requires further development prior to certification. Once the certifying instructor thinks the candidate is good enough to be hired as a Clear Leadership instructor they will notify Clear Learning Ltd. Normally Clear Learning will then issue a certificate indicating that candidate is now licensed to teach the Clear Leadership course and signify this by including them on the Clear Learning website.