

Relationship Toolshop® International Training Institute, LLC Leader Standards & Practices Manual



PART III: UNIVERSAL LEADER POLICIES

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Relationship Toolshop® International Training Institute, LLC
Leader Standards & Practices Manual

PART III: UNIVERSAL LEADER POLICIES

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Throughout this manual, you will see the following abbreviations:

AG = Action Guide

Adv = Advisor (Coach) DSP = Direct Service Provider(s) (Advisors & Group Facilitators)

GF = Group Facilitator

IP = Intellectual Property

JSG = Jump Start Guide (2018 short book title)

PT = Parents Toolshop®

PTC = Parents Toolshop® Consulting

RTLeaders = Relationship Toolshop® Leaders

RT or RTITI = Relationship Toolshop® International Training Institute, LLC

S&P = Standards and Practices

TPT = *The Parents Toolshop®* (Original 2000 book title)

UB® = Universal Blueprint®

This *Standards and Practices Manual* and any pre-acceptance orientation resources (i.e. The Leader Inquiry resources) provide details about what each training program provides and each party's responsibilities and deadlines during the training process and active certification period.

This manual is not written in stone. It is constantly being reviewed and updated as people ask questions the committee has not before answered or clarified. Rather than individually negotiate each decision, the S&P committee decides on a standard uniform policy that would be equitable to all current and future Relationship Toolshop® Leaders — while maintaining and protecting the quality assurance guidelines to which the committee has a primary commitment.

At the time of initial application and in their annual reactivation report, Leaders confirm their understanding of and commitment to follow all Leader policies described in *the most current S&P Manual*. Once a tuition payment has been made, compliance by both parties (RTITI and the trainee) is expected. Whenever S&P updates are sent to all leaders (often with any changes highlighted), those policies go into effect and there is an opportunity for all leaders to ask questions and get clarifications of the new policies. Once that opportunity has been provided, whether a leader chooses to participate in those discussions, compliance with the then-current policies is expected without additional signatures of confirmation or past agreements.

Relationship Toolshop® Leader Standards & Practices Manual

After reading the Introduction please read other sections related to your certification goals or status. They can be found at <http://relationshiptoolshop.com/leader-training/applicant-info/sp-manual/>. You must have a membership status as a “leader applicant” to access this private area.

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APPENDIX: LEADER FORMS (Return to the Leader Inquiry Information page, <http://relationshiptoolshop.com/leader-training/applicant-info/sp-manual/>, and click on the appropriate link to find the forms referred to in this section.)



So, you want to be a certified Relationship Toolshop® Leader and know all the fine details.

Well, we are going to start with a couple apologies. First, sorry this manual is so long and detailed! We wish it could be simpler, however we've encountered so many questions and unexpected situations, some rather problematic, that we want to be as clear as possible. When we've been simple and brief, people fill in any gaps or vagueness with assumptions, which might be inaccurate or lead to problems. So we're trying to be as clear and complete as possible.

As we said in the introduction, this *Standards & Practices Manual* is where we collect *all* the answers to questions that have been asked over the years about how things work. When one person asks an individual question, we always think big (100+ leaders) and into the future (years from now), and make decisions that will be best for everyone --- the company and all those we work with. This gives us consistent, *standardized* policies and procedures and no one gets preferential treatment, which is hard to keep track of and sets new precedents that can create problems, like confusion or resentment among other leaders.

This company is similar to some trainer-certification programs, but is different from most because of the additional support and partnership opportunities we provide. We first and foremost want to protect and enhance Jody's intellectual property while expanding its delivery both globally and in a variety of niches. While this creates greater freedom and more opportunities no other company offers, those opportunities also come with greater time, legal, and financial commitments *by both parties*, as well as more responsibility to each other as you move from one level to the next in the stair-step leader certification process.

So we also apologize if the terminology from herein sounds rather legalistic and formal. We want to be perfectly clear about boundaries and what's flexible within them. We want to be totally honest and transparent, to avoid miscommunications, misunderstandings, inaccurate assumptions, and disappointment or frustration due to inaccurate expectations.

This next section looks at the standards, practices, and policies that apply to *all* leaders. Then, in the subsequent sections, we'll look at each level of leader certification and the policies and procedures that apply specifically to that type of certified Toolshop® leader.

If at any time you have questions or need clarifications, first look at any links provided within the manual to clarification documents. These are our attempts to further explain a policy, which not everyone may need, somewhere else, so it doesn't make the entire manual longer.

LEADER TYPES

Some Leader policies and practices *do* need to differ, depending on *where* the Leader provide services, specifically *whom they represent* while acting in these roles. You'll see these *differences* in the S&P sections for each of these leader "types." For now, here is a more detailed list of the differences, expanding on the table in the Introduction:

To account for the different ways professionals have wanted to use and deliver Toolshop® programs/services, we needed to create three "types" of leaders. Whenever possible, we try to have universal consistent policies and practices, which makes it possible to:

- (a) Reduce confusion in understanding RTITI Standards & Policies
- (b) Maintain the highest quality standards, regardless of where someone receives Toolshop® services
- (c) Seamlessly switch from one leader type to the other, without any gap in liability protection, income-potential, etc., such as when a DSP's employment status changes.

Direct Service Providers

There are two types of certified Toolshop® leaders who provide "direct services," Advisors who *use* the UB® to *coach* one-on-one (1:1) or groups and Group Facilitators who *use, model, and teach* the UB®. We collectively refer to both groups as Direct Service Providers, or DSPs.

Agency DSPs

- *Represent their agency*, as an agency employee or volunteer, when providing Parents Toolshop® programs/services.
- Are employees or volunteers of an agency, almost always non-profit, that wishes to use *one* niche-specific Toolshop® curriculum to provide services to its clients. To ensure consistency of service, the non-profit agency may apply for a lifetime **Non-Profit Agency Curriculum Use Agreement**. This agreement allows lifetime use of *that* curriculum by the agency, taught by their staff/volunteers, who receive GF/DSP certification to teach *that* curriculum *exclusively* to *that* agency's clients.
- **Staff trained under the Agency Curriculum Use Agreement do *not* receive lifetime certification — their certification last only for as long as they work for the non-profit agency that has the Curriculum Use Agreement.**
- May offer local free programs and fee-based programs that cover costs vs. for-profit. If the fee the agency receives is greater than just covering costs, 10% of the difference will be sent to RTITI.
- May display/leverage Parents Toolshop® branding *in addition to* their agency's branding.
- Can use term "Approved <Niche> Toolshop® Provider" on their company website and publicity.
- Agency provides professional liability insurance to its staff who are Certified DSPs, specifically naming RTITI as an insured party *or* signing a "hold harmless" agreement waiving liability against RTITI should their staff be named in a complaint..
- Since Agency GFs serve low-income, high-risk clients who may have special needs and challenges learning in a group setting, **Agency DSPs are the *only* DSPs permitted to teach the UB® in 1:1 settings with a client.** To clarify, they must have *both* Advisor and GF certifications.

If Team DSPs *want* to provide 1:1 *teaching* services, they also need *both* DSP certifications (Advisor and GF), then contact the S&P Committee requesting permission and describe why this client is unable to learn in traditional group settings or on-line classes.

- Ongoing support for Agency DSPs' class graduates may be provided two ways:
 - Agency GFs/DSPs may provide their own on-going support groups for their clients (by phone, webinar or in person) *if* they have also completed the Advisor Certification and shown they have the skills to do so.
 - Agency GFs/DSPs can refer their graduates to the long-distance support services offered by the Expert who developed the curriculum *if* they complete the Advisor certification and agree to cover their fair share of Graduate support calls/webinars.
- They receive the GF and Advisor trainings and resources, but not any training, services or benefits specifically related to building a business.
- Receive training/coaching in local non-profit program marketing
(See the GF section of the S&P Manual for more information about this certification program.)

RT Team DSPs:

- Are part of the Leader Team who delivers direct services **for a particular RT Expert** who has developed a particular niche RTITI product/service division.
- **Provide their Toolshop® services as RTITI consultants, representing RTITI**, including its subsidiary divisions.
- *Can* provide Toolshop® services outside of their regular employment, but may *also* teach Toolshop® programs through their employer *if* their employer approves.
- Retain their Toolshop® certification/license even if they leave that employer; it follows them.
- May offer local live free and fee-based programs.
- *Can use/leverage* existing Parents Toolshop® website & e-commerce to deliver on-line Parents Toolshop® courses.
- RTITI is responsible for securing the professional liability insurance (part of Leader annual fee for renewal).
- Receive Training/coaching in local program marketing *and* online marketing *basics* (specifically, referral-generating tasks), so they can participate as an active team member in promoting and referring people to the Toolshop® division they are certified to serve.

Independent DSPs:

- Provide a RT Expert's niche Toolshop® programs/services **representing their own private company**
- May offer local free and fee-based programs
- May display/leverage Parents Toolshop® branding *in addition to* their own company's branding. *May not replace* Toolshop® branding with their own company's branding.
- May pay for an optional "on-line add-on" to get a Wordpress Blog plugin that sends parents to Parents Toolshop® courses from their company website, while showing their website branding, to

“co-brand.” You may offer Toolshop® programming through your company, but may not change the branding of the program (like a white label). (See the Introduction, section on trademarks for more details.)

- Can use the term “Approved Toolshop® Provider” on their company website and publicity.
- DSP’s company is responsible for obtaining professional liability insurance, ensuring it covers their DSP activities, and has *either* added RTITI as an insured party for *that* DSPs services *or* signs a “hold harmless” agreement waiving all liability against RTITI.
- Receive training/coaching in local live program marketing. If their business has a website, it’s their responsibility to get training in on-line marketing.

(See the GF section of the S&P Manual for more information about Team and Independent GF certification.)

RTITI Experts

Expert certification is *not another* type of Direct Service Provider. Experts are *already* DSPs for an *existing* Toolshop® curriculum, then move on to *create a new* Toolshop® service division for a new niche population, serving as the first Advisor and GF for their new curriculum. In time, RT Experts will have their *own* team of DSPs who use and teach *their* curriculum, programs and resources. See the Expert section of the S&P Manual for how this leader certification works, because it’s *completely different* from DSPs, yet *all Experts adhere to the Universal Leader Policies* set forth in *this* section.

UNIVERSAL RELATIONSHIP TOOLSHOP® POLICIES

CONTENT OWNERSHIP

All content created for or submitted to RTITI or any of its subsidiary niche divisions or leaders for the purpose of creating/co-creating programs/services, resources/products for RTITI becomes the property of RTITI, especially if it relates to the proprietary UB® system, its tools or their applications to relationship or parenting challenges.

Note that “ownership” is different than “authorship.” The copyright section of the Expert S&P manual goes into great detail, but generally, copyrights are owned by RTITI, meaning they file the copyright forms and the copyright is in its name. On the copyright form (and later the legal certificate) are listed the authors or co-authors. *Authorship* is what copyright law deems to be the criteria for sharing of royalties, based on amount contributed. RTITI always follows US Copyright laws. If any kind of payment or service trade is provided in exchange for content contributions, those contributions are then considered a “work for hire” and the content contributor is not considered an “author” and will not be listed on the copyright form. Experts are considered co-authors, while other Content Contributors will most often be compensated somehow and therefore be acknowledged for their contributions, but not listed as authors or be eligible for profit/royalty splits.

- ***Certified Toolshop® Direct Service Providers*** (Advisors and Group Facilitators): Each DSP chooses one or more curricula they want to use (Advisors) or teach (GFs). We encourage them to learn as much about their clients or audience, so they can “customize” the teachings and applications to their needs. This is usually done *verbally*, in their interactions or presentations, while using *already-existing* Toolshop® resources and materials. We have and always will allow GFs to reference supplemental resources and research. We ask only to approve them first, to assure they are consistent with Toolshop® philosophy and teachings, since the DSPs are supplementing Toolshop® teachings with them.

If DSPs want to *create new* programs or resources that are specific to a particular niche, then they need to become RT Experts, who are authorized to *co-author* new Toolshop®/UB® content (which RTITI will own), by repurposing *existing* content and adding to it their expertise and references to relevant supplemental research and resources. (They *can* be a CC for an AG, which is not being a co-author.)

If a DSP isn’t interested in being a RT Expert, but simply wants to edit some of the presentation aids, he/she can request permission to do so and provide these edited or customized resources to RTITI, to review, approve, share with other leaders, and as a starting point for the future Expert for that niche. These resources will enable GFs to get more speaking engagements to a wider audience, which translates into greater income potential for him/her...and other RTLeaders. DSPs may take self-initiative to request permission and spend their time creating these, with the understanding that RTITI will own them, since they are editing existing Toolshop® materials to create them. They may or might not receive any revenue splits from the use or sale of them to other leaders, depending on the terms of the permission granted, extent of edits or content contribution and use of what’s created. (See more details in the Advisor and GF sections.)

- ***RT Experts:*** As stated above, RT Experts have *exclusive rights* to co-create/co-author *new* Toolshop® niche-specific programs, curricula, and resources for a particular niche. They do this by co-authoring new programs with Jody or and repurposing *existing* Toolshop® content and *adding* their expertise, relevant research, and supplemental resources and content consistent with Toolshop® philosophy and teachings.

The existing Toolshop® resources/programs they repurpose are *not* “white label” or “private level rights” (PLR) resources where someone can use them as-is or edit them, put *their* name on them, and then sell

them under their own or a different brand. (See the Glossary for more clarifications on these terms.) The business they are helping to start and grow is a RTITI subsidiary niche division, which offers niche-specific programs and resources, all of which are owned by RTITI.

Although the business and content will be “owned” by RTITI, RT Experts *will* be listed as *authors* on the resources they co-author and in any copyright registrations. They also will receive revenue sharing on *all* resource sales and speaker fees related to their niche division. (See the Expert section for more details.)

Any RTITI content/documents provided for repurposing (RT Experts) or customizing (GFs) shall be provided through RTITI’s account in a cloud document collaboration program (like Google drive), so the content always resides on RTITI-owned platforms and storage. This provides real-time collaboration, tracked edits and a means to have a backup should any leader’s computer crashes. Any documents needing downloaded will be with RTITI’s prior permission and shall be deleted via the terms of the NDA if/when the leader is no longer active.

RTITI CERTIFIES INDIVIDUALS, NOT ORGANIZATIONS

If your employer pays for your certification or you will be using Toolshop® programs in a job through an employer, you are signing the NDA as an individual, not as a representative of that company or agency. If you should violate the terms of the agreement, you accept full liability for the consequences. Your employer will not be held liable for any punitive or compensatory damages beyond ceasing and desisting the use of RTITI’s proprietary information and intellectual property until such time as a fully-certified instructor who has signed on and is in compliance with the NDA replaces the RTLeader (instructor) who was in violation of the agreement.

If you are an Expert, you will have the privilege of being Jody’s business partner and Co-Director of a subsidiary RTITI niche-specific product/service division. You can do this *in addition* to having a separate non-Toolshop® *private* business or while employed elsewhere, as long as your employer approves or it isn’t a conflict of interest or potential competitor of RTITI. (Usually, Co-Directing a RTITI niche division will *enhance*, not endanger, your employer’s business.)

THE “MOST CURRENT” CONTRACTS & AGREEMENTS APPLY

Copies of forms and agreements, such as the Non-Disclosure Agreement, Intellectual Property Repurposing Contract, Terms of Service, etc. are available in this Standards & Practices Manual’s Appendix.

As the S&P Committee changes these policies and agreements, they update these forms and notify all Leaders of any changes that might affect them.

After first signing these agreements, during the initial Leader Application and approval process, you will complete an annual report during your license renewal period. In that report, you will check off that you’ve reviewed the most updated forms and S&P manual and understand that the terms of *the most current* form/policy/agreement are what is in effect and what you will be expected to follow or uphold moving forward.

That agreement follows you throughout the year, so if you receive notifications of policy changes, your previous agreement serves as documentation that you agree to uphold *whatever are the most recent* policies, even if they are not identical to the terms/policies in place when you originally signed the agreements.

TERMS OF PROVIDING TOOLSHOP® SERVICES

RTLeaders *can only* provide Toolshop® services for which they are certified, as long as they have an “Active” status license. (See the [Leader Activity Status Categories](#) in this section, page 38 for list and description of statuses and Glossary of S&P Definitions Section, page 1 for the definitions of “certification” vs. “license.”) For example, you must have completed the Advisor Certification to provide 1:1 coaching and completed *all* requirements of the Group Facilitator Certification to teach Toolshop® programs. Then, each year, you must re-activate your license to provide services.

LEADER TEAM NON-COMPETITION

At no time do Certified RTITI Leaders compete with each other. All RTITI policies and systems are designed to make cooperation, collaboration, and inter-team referrals mutually beneficial to all involved.

Should a Leader actively compete with or engage in fee-bidding wars with sponsors against other Leaders who regularly serve that sponsor/niche/territory, it can damage Leader team relationships and result in a Leader Standards or Ethics violation.

Generally speaking:

- Experts have their own unique relationship “niche.” They can usually serve any geographic territory where there is no other leader who is already teaching the same curriculum.
- DSPs have a local “territory” they serve *and* particular curricula they are certified to teach.

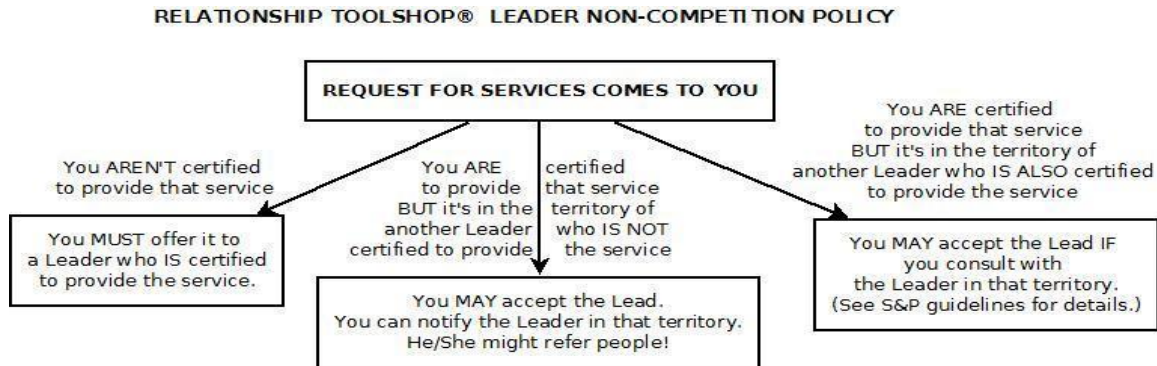
The Leader directory or a call/email to RTITI can tell you where Toolshop® Leaders are providing service and what they are certified to teach.

Since DSPs may be certified to teach more than one niche-specific Toolshop® curricula, there may be more than one GF providing Toolshop® programming in a particular *geographic* territory, if they are teaching different Toolshop® curricula. (For example, one GF teaches Parents Toolshop® while another GF teaches Foster-Adoptive Parents Toolshop®.)

If you receive a request to provide a program in a niche or geographical “territory” another Leader serves, your options depend *first* on *what* you are certified to teach, *then* the *territory* you serve. For example:

- **If you receive a request for a niche-specific program you aren’t certified to teach, you must pass it on to an Active Leader who is certified to teach that curriculum, regardless of the territory either of you serve.** You have the option to request a “referral fee” for passing on the lead.
- **If you receive a request for a niche-specific program you are certified to teach, but the request comes from a sponsor located in the geographic territory *another* Leader serves who is *not* certified to teach that program, you may accept the contract.** Out of professional courtesy, notify the Leader in that territory. They may be able to refer participants to your program! If so, it would be a nice gesture to offer a referral fee.
- **If you receive a request for a niche-specific program you are certified to teach, and the request comes from a sponsor located in the geographic territory *another* Leader serves who is *also* certified to teach that program, you may *consider* accepting the contract yourself *if* you give a “professional courtesy call” to the Leader in that territory to inform them:**
 - (a) You received the request,
 - (b) Verify that Leader has not already served that sponsor or begun negotiations for a contract, and

(c) Inform that Leader of your desire or intent to accept/ fulfill the contract. If that Leader wants the contract and you agree to give it up, that Leader would be *expected* to give you a referral fee from the speaker fees earned. (The Leader risks, however, the sponsor not agreeing to the contract if they present it instead of you, who was the one whom the sponsor originally asked.)



RELEASE OF LIABILITY NOTICE

RTITI is not liable for the conduct of any of its leaders. We make every attempt to screen, train, and monitor our Leader's involvement with clients and consult with a licensed clinical supervisor around problems they experience. Nevertheless, due to the independence and widespread geographical location of each RTLeader, we are unable to directly supervise each on a regular basis.

This S&P notice may be difficult to legally enforce, should it be tested. Therefore, RTITI provides additional protection through a professional liability insurance policy. This policy would cover individual RT-DSPs *and* RTITI as the company they represent, should they be sued, but this isn't the only reason we have such coverage.

RTITI is *required* to insure *all* its direct service providers for the following reasons:

- Jody Johnston Pawel is a Licensed Social Worker in the State of Ohio. Since she is the author or co-author of all Toolshop® curricula that DSPs use, the State Board has told her she *must* carry professional liability insurance on herself *and* anyone who *uses or teaches* her curricula in a direct service capacity or she could lose her license.
- All RT DSPs are representing RTITI or its subsidiary company PTC when they provide direct services. Therefore, RTITI must have a professional liability insurance policy that covers *all* its direct service providers.
- The liability insurance company requires *all* company representatives be insured. Our policy automatically insures everyone. Previous policies that insured each individual was super-expensive and still required the *company* be insured because there were multiple representatives. So it's reasonable to expect each insured leader to pitch in for this annual fee.
- Many of speaker contracts (i.e. school districts, government contracts) *require proof* of professional liability insurance. By providing this insurance, it opens up additional speaking opportunities for our trainers. (RTITI can provide the policy to each leader upon request.)
- Many RTLeaders work with clients involved with legal issues (divorce or protective services due to abuse or neglect allegations) or around relationship issues. Other people involved in these cases or with the participants/graduates of our programs (not necessarily those we directly serve) may be

unhappy with court decisions and challenge various aspects of the RTITI curricula used. (I.e. the skill assessments, home studies, etc.) Therefore, RTITI needs to have *all* its service providers insured, especially our advisors/coaches and trainers.

As you can see, the reason for having liability insurance extends beyond protecting individual RT Leaders. So even if an individual leader lives in a country where “people don’t sue each other” this insurance still affords protection from those who do and for the company as a whole, which does *not* have a choice to be insured. This is definitely one area where “the needs of the many” (and of those who are putting their reputation and livelihood on the line to provide a business opportunity for others) outweighs the needs (or perceptions it’s not needed) of a few. We are a team and we watch out for each other. We watch out for our leaders and we would only want to have leaders on our team who care about looking out for the author and company’s needs, too.

Since Independent DSPs are representing their *own* company when presenting Toolshop® curricula, they do not need to be on the RTITI professional liability insurance policy, but *must* have their *own* coverage or sign a legally-binding liability waiver agreement, which the IDSP may have drafted by an attorney at their own expense.

Agency DSPs exclusively train for their agency/ non-profit organization, they are exempt from RTITI’s policy, as long as RTITI receives one of the following:

- A copy of the agency’s liability insurance policy statement, including any page(s) of the policy that state RTITI trainers are covered. (The language doesn’t have to mention RTITI by name; it could refer to staff presenting programs created by non-staff.)
- A letter on agency letterhead that the DSP is covered by the agency’s liability insurance.
- The agency signs a “hold harmless” statement provided by RTITI.

Since RTITI has no choice in covering all active RT Team Leaders, they have an option each year to remain active and receive this coverage. (See specific details in the ‘Yearly Hard Costs’ section on page 27 of Part 1.)

Failure to pay your share of the liability insurance could result in the termination of your license or certification if allegations, complaints or charges are lodged against you or RTITI.

Furthermore, there are some liability waiver issues based on each type of certification you hold:

- *Advisors are required* to have each client sign a “Release of Liability Form” as part of your intake process with clients. (A link to this form is provided in the Advisor Training.)
- We *recommend Group Facilitators* either read aloud or print and distribute this notice at the beginning of each class/webinar.
- *Experts are expected* to put a Terms of Service page on their co-branded Toolshop® website for this purpose. (We install a plug-in that provides a constantly updated statement or, if that isn’t present, RT Experts can repurpose the one on the RTITI site.)

RTITI recommends that RTLeaders/Trainers who provide services for companies *other* than RTITI *also* obtain *individual* liability insurance that covers you as a trainer for those other agencies *OR* do *all* your training *through* RTITI, so you are covered by RTITI wherever you train. (Contracts and payments would be in RTITI’s name and the appropriate fee splits would apply. See Part III: DSP section.)

LEADER FEES

RTITI is like most certification/licensing companies in that it expects:

- That people will pay for their certification training and to keep their license active.
- People who choose to get the certification are responsible for doing something with it or not continuing to be certified.
- If someone makes a profit off a company/author's IP, a percentage is paid to the company/author.
- People who are certified receive basic services related to getting and keeping their certification/license, and pay for extra services/benefits, especially those that cost the company time (which could be spent on income-generating activities) and expense.

ANNUAL RENEWAL FEES

While RTITI usually includes all *training* programs as part of a Leader's certification fee, there are certain hard costs RTITI incurs on an annual or monthly basis to provide the infrastructure (secure internet server, domain hosting, shopping cart, affiliate program, etc. for Experts), RTITI team support, professional liability insurance, etc., which it provides for all of its active Leaders. (See page 26, 27 and 38 for more information about professional liability insurance. [See current pricing here.](#))

RTITI covers these hard costs during the first year of your relationship with the company, using your initial certification fees. You are often engaged primarily in training and may not have launched your coaching, speaking or Expert website.

Starting the second year of your involvement with RTITI, you will re-activate / renew your license annually. This fee includes a share of any related liability insurance (some license types have none) and a license renewal fee that helps cover hard costs incurred by the company to provide training, resources, and support to its leaders and the infrastructure RT Leaders can leverage to expand their service base.

Certification fees are based on this formula: professional liability insurance split, services provided and paid for (expenses) that benefit all leaders and provide platform and opportunities for leaders to use their license, and productivity/performance of being active and bringing in income to the company.

Specifically, you are *required* to:

- Notify the Standards & Practices Committee by October 1st of each year as to whether you intend to be an active leader for the following calendar year.
- Each October, RTITI will calculate any hard costs, including professional liability insurance cost, for the following year's premium, based on the number of Active Certified RTLeaders.
- In November, all Active Leaders are notified of their share of the liability insurance, license reactivation/renewal, and hard costs (Experts only, like website hosting fees, domain renewals, etc.) fee.
- Pay your fee by December 1, by setting up monthly payments for one year, or pay in full to get discounts (less per month + 2 months free).
- If you choose *not* to pay your fees, your status will be downgraded to Inactive and you may not have any direct (DSP services) or indirect (Expert articles with advice) contact with clients through RTITI for that upcoming calendar year.

Active leaders can recoup their annual fee. In many licensing/certification programs, there is no income *made* from the certification; people just pay every year. With this certification, the fee can be recouped. It's up to the leader to do so.

The S&P committee could decide whether any discounts or waivers will be offered to individual Leaders whose activities have resulted in substantial profit-sharing income for RTITI on a case by case basis. The committee would consider income *a leader is* responsible for generating/bringing to the company, not leads or events the company provides to them. For example:

- If a leader *consistently* generates income *above* their annual fee and minimum expected fee splits for one year, they can get a ½ off discount on their recert fee (minus prof. liability insurance split).
- After two years straight, then a full discount on license renewal fees could be considered, as long as the documentation shows the expected performance levels of “Active” leader.

SPEAKER FEES AND SPLITS:

Leaders may set their own fees, based on their niche or market-value in their geographic area for similar services.

The speaker fee splits you earn or pay for your programs depend on *whom* you are representing. **All fee splits are based on *net profit***, after expenses, affiliate commissions, etc.

It is the responsibility of RTLeaders to report *monthly* their activity, expected income, and document expenses (including copies of receipts). Together, these show what they believe to be the net income) and fee splits they expect to receive. This provides a double-check method to assure that RTITI and the leader are on the same page and there will not be unnecessary upsets by a leader not being paid what they expect. This reporting also helps determine “active” status and recertification fees. RTITI will provide the appropriate tracking documents through a cloud file-sharing service (like Google docs or OneDrive).

Since time is needed for *net profit* to be calculated/reported, and in some cases RTITI needs to wait for a payment from a customer/client/sponsor, etc., **RTITI will commit to paying Active RT Team DSPs within 90 days of the RTLeader reporting services and expected fee splits.** RTITI issues payments on the 10th and 25th of each month, so *usually* payment can be made within 30-60 days. If RT is waiting for payment, RT will communicate this to the DSP and maintain progress reports.

If you have already developed *your own* service or resource *OR* develop, write and present programs that *don't* use any Toolshop® or UB® material, you own the copyright to these materials and programs and there would not be a speaker fee split with RTITI when you use/present these programs. If the RTITI site refers visitors to these services, we may do so with an affiliate link to receive a commission, like all other Toolshop® leaders and affiliates can do. (See S&P Section III: Direct Service Provider Section for the current fee split rates and [Clarifications of Fee Splits pdf](#). Ignore fee split rates in examples. Refer to current pricing for current fee splits.)

Since all fees are to be paid directly to RTITI, fee splits will be paid *to* each leader, who are considered consultants and not employees (IRS 1099 contractors in the USA). It is each leader’s responsibility to claim this income in accordance with the state/country tax laws in which they reside. Again, **by having RTITI receive all payments, and RTLeaders being *individual* contractors for RTITI, you do not need to set up a separate consulting business to receive fee splits from RTITI.**

SALES PROCESSING

To prevent RT Team Leaders from having to do costly, complicated, time-consuming legal, business, and tax-prep tasks, all transactions by RT Team Leaders shall go through RTITI. The only exceptions are:

- Non-Profit Organization Direct Service Providers (NPO-DSPs), who exclusively provide Toolshop® programs through their agency as an employee. Their employer will buy whatever resources/training materials needed and provide it to staff or clients at no profit.
- Independent DSP franchise owners, who already have a business setup, vendors license, a separate tax ID, etc. They can buy at wholesale (tax-free as a reseller) and resell, paying all required sales tax as required in *their* area.

To process *off-line* transactions for Toolshop® service fees or resource sales, follow these guidelines, based on the type of sale:

- Whenever possible, payments for Toolshop® programs and resources should be processed on-line.
 - RTITI uses PayPal, Google wallet, and Stripe. (The latter can process nearly every currency in the world, even more than PayPal).
 - RTITI can create a product payable in a foreign currency.
 - When RTLeaders use their affiliate link to send people to order direct from RTITI they get a commission.
 - Each leader can get a credit card swiper for their cell phone and set it up to go into RTITI's account. In U.S., we recommend PayPal swiper. Stripe recommends the following: (You'll need to investigate and choose which you want to use):
 - [Control](#) lets you accept in-person mobile payments via card reader (including EMV compliant Chip & PIN and NFC).
 - [Innerfence](#) offers a card reader & app that makes it easy to accept face-to-face payments with your Stripe account.
 - RTLeaders can also use a RTITI sales page on a laptop or device and enter the order on-line.
- **Checks** are to be made payable to "Relationship Toolshop® International Training Institute, LLC," or "Relationship Toolshop" for short, and sent to RTITI for deposit.
- **Cash** payments:
 - **RTITI does not accept cash or engage in wire transfers where the company's bank account information must be shared.** It does accept VISA, MC, AMEX, DISCOVER, PayPal, Google wallet, Stripe, and checks made out to RTITI (from US banks).
 - Each individual presenter can decide whether to offer a cash option at events and how to handle cash transactions. If you choose to, follow these recommended guidelines:
 - If you accept cash, be sure the customer fills out an [order form](#) with contact information, email and indicating what they bought.
 - Then the leader places the order on-line, using a 100% off test coupon code for RTITI team members (this includes RTLeaders). This can be done after the event, if it's a large crowd. (Contact the Leader Coordinator to request permission to accept cash payments and get this coupon code.)
 - Then the leader sends the payment to RTITI, in \$USD, using one of the following methods:
 - "Send money" via PayPal, Goggle wallet, or Stripe. (Recommended for non-US transactions.)

- If you know you will be using this option, add a service fee of 4% for all cash transactions to cover PayPal/Stripe fees).
- Deposit the cash in your bank account, then mail a check to RTITI along with a copy of the related order forms. (Recommended for US payments)

All *on-line* Toolshop® service fees and resource sales *must* go through the RTITI shopping cart. (Each Expert’s co-branded Toolshop® resources/courses for their core “Product funnel” are set up in the RTITI shopping cart and email provider.) Just register people on-the-spot, on-line, using a laptop and have the customer enter their own credit card information. The sales process is set up to automatically set up their course/access accounts.

The only exception is for international Leaders who have a currency or banking system that can’t be processed by the RTITI shopping cart, PayPal, Stripe, or other on-line payment processors. If no on-line option exists that supports your currency, we’ll make individual arrangements with you for *any* financial transactions (i.e. tracking credits and payments due for anything *other than* sales of items with hard costs; those must always be paid for in advance, since RTITI must pay for the printing upfront).

AFFILIATE COMMISSIONS

You can become a Toolshop® affiliate at any time and start earning affiliate commissions for recommending Toolshop® services and resources. As your status changes (i.e. you become a certified Leader), your commission rates change. Although commission rates may change, based on the product or affiliate classification, the usual rates are:

- Commission rate for resources with hard costs (i.e. printed books) = 10%
- Certified Toolshop® Advisors, GFs, RTITI Team/Staff, and JV partners = 30% on high-end programs. Possibly less on low-cost programs/resources.
- RT Experts = 35%
- See <http://relationshiptoolshop.com/about/affiliates/> for details or ask RTITI for current rates.

These *affiliate* commissions are for promoting RT products and services (RTITI, Jody Johnston Pawel, or Certified RT Experts’). The *royalty split* between Expert co-authors and RTITI is *not* a “commission.” (See Part II: Expert section of this manual and/or the IP repurposing Agreement for more details.)

RTITI cannot guarantee commissions for qualifying purchases unless the Leader has signed up for the RTITI/Ambris Publishing Affiliate program, which automatically tracks sales and commissions. To receive commissions for book sales/purchases *not* made directly by the Leader or through the Affiliate link, do any of the following:

- Purchase books to resell. (If purchased at a bulk discount, Leaders can resell for up to the retail price for a profit.
- Place an order for someone.
- Give order forms (or RT brochures) with Leader’s name on it so Leader gets credit for resulting sales.
- Tell purchasers to give the Leader’s name when ordering.

RTITI/Ambris Publishing cannot track or give credit for sales through bookstores that result from a Leader’s referral, unless the Leader or buyer notifies Ambris Publishing of this purchase. (Tell the Leader Coordinator.) RTITI recommends Leaders keep receipts of any sales they are responsible for, beyond the RTITI Affiliate Program.

Similarly, if a leader uses another company's affiliate's link (i.e. Amazon.com Affiliate link), that company's commission rates apply and RTITI will not pay a commission.

Note: although we will do our best to count all qualifying purchases towards commissions, there is *no guarantee* that purchases made outside of the RTITI Affiliate program will be honored.

SALES TAX

Leaders shall pay sales tax (when applicable) on the price they pay for the books. Ambris Publishing will report sales tax to the state. (The sales tax rate (%) is that which applies in RTITI/Ambris' county of operations.) Since sales tax has already been paid, **leaders do not need to charge, track or report sales tax.** You *may* sell resources for more than the SRP (Suggested Retail Price) on the UPC code, to reimburse yourself for these taxes.

If you include books or other training materials with your class fee, no sales tax needs collected from your students.

Note: Since RTITI operates out of Ohio, and Ohio sales tax laws state that out-of-state or on-line sales, or service fees are *non-taxable* sales, **the only leaders who likely would need to pay sales tax to RTITI are those selling books in Ohio, to Ohio customers.** (See [Clarification about Resource Production, Sales, Sales Tax and Business Reporting](#) for more details. You may also want to consult with a local tax expert, explain how RTITI handles sales tax, and confirm your state or country doesn't have different laws that supersede RTITI's, the parent company.)

TAX-EXEMPT & NON-PROFIT SALES:

Leaders can purchase books/products tax-free if they are:

- Located outside the state of Ambris Publishing's operations (the State of Ohio in the USA) & *if* they order direct from Ambris Publishing. (Any of the RTITI co-branded Toolshop® sub-blogs on the hub site will use the same shopping cart, to track sales, affiliate commissions, etc.)
- A bookstore that will resell the books and charge/track/pay sales tax.*
- A licensed vendor who will resell the books and charge/track/pay sales tax.*
- Including the book as part of a class fee. Although tax need not be paid by the participants, or even pay for the book directly (since it's included), Ambris Publishing should still be paid a % of the class fee that was added for the value of the book, *in addition* to the class fee split. It is a violation of copyright law to make copies of someone's book and not provide compensation to the author, unless there is a legal agreement between them specifying the terms.
- An employee of a nonprofit agency.*

* All nonprofit or tax-exempt organizations should submit a "blanket certificate of exemption" with their first purchase. (Ask Ambris Publishing for this form. Jody is the best person to ask.)

FINANCIAL POLICIES

Active leaders are expected to meet all financial responsibilities. **Failure to pay any fee on time may result in disciplinary probation or termination of your license.** Paying one's fees on time is part of being a reliable professional, and we provide significant discounts for paying the annual renewal fees in

full, to prevent collection issues. RTITI doesn't want to spend its time sending reminders and doing collections. If it does, you may incur penalties or disciplinary action.

When you reactivate your license each year, you are making a commitment for the entire calendar year for which you choose to be active. If you resign or your license is terminated or revoked during that year, your annual renewal fee is non-refundable.

If you want to make monthly payments, you can choose to use PayPal and use either your credit card or PayPal Credit for 0% interest for 6 months.

If RTITI ever offers a payment plan, using it comes with the expectation to complete whatever is the agreed duration of the plan. RT Leaders who set up a recurring payment are expected to make all payments on schedule, through a secure, automated, pre-scheduled service (such as PayPal or Authorize.net), keeping the account information (i.e. current mailing and email address) and available balance (in the bank or credit card account) updated as needed. It is the RT Leader's responsibility to contact the bank or credit card holder services to notify them of the agreed upon recurring payments. See the Leader Violations/Penalties for additional information regarding recurring payments.

Payment Policy

By enrolling in a Toolshop® Leader Certification Training Program, you agree to pay the full tuition of that program (reflecting any agreed discounts) to Relationship Toolshop® International Training Institute, LLC (RTITI). **Your tuition pays for RTITI *providing* the training materials, resources and services related to the training program for which you have applied and been accepted, whether you choose to access and use them or not.**

Once payment is initiated, the training has officially commenced and the trainee's agreement to and each party's compliance with the service agreement is expected, because RTITI has met its part of the service provision agreement.

Disclaimer of Guaranteed Results

There are *many* factors that can influence the results you achieve as an RTLeader. Therefore, Relationship Toolshop® International Training Institute, LLC makes no implications, warranties, promises, suggestions, or guarantees whatsoever, in any manner of speaking, in whole or in part, that by purchasing, joining, participating in, responding to, following, or adhering to the information contained on the website or in any of the resources provided to you, that you will earn any money whatsoever (or whatever the content in question may appear to imply such as number of website visitors, number of clients, passive affiliate income, etc.)

Any results, earnings or income statements, or any earnings or examples of results, earnings or income given in the Leader inquiry process and/or Standards & Practices Manual, are only estimates of what we think that you *could* earn or that others have achieved. There is no assurance that you will do as well as stated in any examples. This applies whether the earnings or income examples are monetary in nature or some other form, whether such forms are convertible to cash or not.

There is no assurance that any prior successes or past results as to earnings or income (whether monetary or other forms, convertible to cash or not) will apply, nor can any prior successes be used as an indication of your future success or results from any of the information, content, or strategies. Any and all claims or representations as to income or earnings (whether monetary or other forms, convertible to cash or not) are not to be considered "average earnings."

The testimonials and examples used may not apply to the average person and are not intended to represent or guarantee that anyone will achieve the same or similar results. Where specific income or earnings (whether monetary or other forms, whether convertible to cash or not) figures are used and attributed to a specific individual or RTITI niche division, that individual or RTITI niche division has earned that amount. There is no assurance that you will do as well using the same information or strategies.

Your success in using the information or strategies, or participation in the Affiliate Program, depends on a variety of factors, including your implementation of what you are taught or advised to do, your target market, etc. We have no way of predicting or controlling how well you will do. Despite our best efforts to only accept trainees who are a good match, in terms of your background, your work ethic, your dedication, your motivation, your desire, or your business skills or practices, other factors, which may be unpredictable, may arise, such as family or financial status changes, or health issues, which can affect your outcomes, too. Therefore, Relationship Toolshop® International Training Institute, LLC does not guarantee you will receive any specific results.

Refund Policies

Once training materials, resources or services that are part of the RTLeader Certification training package *are made accessible* to the trainee, in accordance with the sequence and timeline outlined in the *S&P Manual*, RTITI will have met their responsibility to provide the comprehensive training program to the trainee and **full payment of the tuition is expected**. Whether the trainee chooses to access or complete the training has no bearing on payment, since it *was* “provided” by RTITI.

All training fees beyond any stated policies are non-refundable, because trainees are immediately given access to thousands of dollars’ worth of proprietary training materials and resources, *whether or not they choose to access or use them*. Choosing not to access the available resources, actively participate in the training or support calls/webinars offered, not implementing what you learn, failure to launch a RTITI niche division, or dissatisfaction with the results you get **are not grounds for non-payment.**

Example: A trainee makes the payment for a for an RTLeader certification training and is given access to the training resources. The trainee never accesses the program that was provided and decides to withdraw from the training after a month. Since RTITI made that training program available to them (and could have been downloaded and saved), as well as the live support calls/webinars (even if the trainee didn’t come to them), RTITI has fulfilled their part of the service delivery agreement and would have continued to, had the trainee continued.

MARKETING RESPONSIBILITIES

Obviously, RTITI can’t coordinate publicity for every Toolshop® program in every community in the world — you know your community better than RTITI does! Ultimately, you are responsible for your own marketing, which is why we train you in these skills and provide templates of Toolshop® marketing materials.

RTLeaders are added to the Leader Team list on the appropriate Toolshop® website as part of their certification/renewal fee. Since not all DSPs want to do online webinars/support, if a leader wants to be added to an *additional* list on an *existing* Toolshop® web page, as one of several Toolshop® coaches/GFs/DSPs that are listed as offering coaching/support, there may be a small, nominal fee (like \$25) for this task, following a standard procedure.

RTITI includes training on how to get a job/contract with the related license, and provide templates to do so. It also teaches *how* to build a business or practice with the certification. RTITI is *not*, however,

responsible for marketing or securing clients *for* its certified leaders unless such market research and delivery services are contracted with and paid for as an ala carte service.

RTITI provides *monthly* coaching or support. (Experts receive one two-hour one-on-one support call each month related to their niche division.)

If a leader requests personalized or one-on-one support, or to do marketing for them, it will be for an additional fee. For example: RTITI can develop ads for Advisor services or TIPS classes, featuring a specific leader. The leader would pay RTITI for these services *and* any time and fees incurred in paying for that ad. The leader would have the opportunity to choose limitations, such as: whether the fee is pay-per-click or has a fixed budget limitation, targeted ad features (such as age, location, etc.), would pay extra for any special key word research for the ad.

Although RTITI can't realistically do marketing for each leader, it *can* sometimes offer additional assistance:

- If RTITI contracts with a sponsor and *offers you the program*, RTITI will work directly with the sponsor to coordinate/design publicity and marketing. This is part of the reason there are GF fee splits for these programs. (See S&P Section III: DSP Section for the current fee split rates.)
- *If you arrange your own programs*, you are responsible for working with the sponsors to publicize and market your programs. RTITI can offer you advice, templates, and samples. (See S&P Section III: DSP Section for the current fee split rates.)
- If you are representing your *private* businesses or your *employer*, you are solely responsible for your own publicity and marketing, since there might be unique internal marketing procedures. The *content* that represents anything Toolshop®-related *in* the publicity needs approved by RTITI, to assure it clearly, accurately, and positively represents RTITI branding.
- RTITI will *always* offer samples and advice to *any* Leader. It is the Leader's responsibility to adapt those samples to fit their specific program and their target populations' needs. **Any adaptations, edits, or newly designed publicity need approved by RTITI, to assure consistency in message and branding.**
- **If any of the above publicity mentions the Toolshop® registered trademark brand name or is for any programs based primarily on Toolshop® curricula or teaches the Universal Blueprint®, it must be submitted to RTITI for edits and approval 4-6 weeks prior to distribution, so RTITI knows how it is being represented to others.**

CERTIFICATION REFUSAL CLAUSE

With the guidance of the Standards and Practices (S&P) committee, the Relationship Toolshop® International Training Institute (RTITI) President and/or author/co-authors (Experts) of the copyrighted materials to which a leader is representing, reserve the right to deny or terminate the license or certification of any inquirer, applicant or certified Leader that demonstrates unprofessional behavior or qualities that could potentially blemish the positive reputation of RTITI, the Toolshop® or Universal Blueprint® brand names, any Toolshop® resource and/or service and RTLeaders in general.

These behaviors include, but are not limited to, any conduct or activities that the S&P committee considers, in its sole opinion, to be unprofessional, unethical or illegal, including: negative evaluation reports or poor financial standing with creditors, including RTITI or S&P violations (see pg. 20 of this section). The S&P committee may not, however, discriminate against any applicant or instructor due to

race, culture, religion, gender or other Equal Opportunity Employer guidelines, even though they are not “employees.”

There is no guarantee that applicants who complete the screening and training requirements will receive Leader certification. Certification is dependent on competency in the following areas:

- Knowledge of and commitment to RTITI and Toolshop® principles,
- Mastery of the Universal Blueprint® and its skills,
- Effective leadership skills: coaching, speaking, group facilitation, etc.
- Personal qualities and professional skills, such as: meeting deadlines, honoring commitments and agreements, maintaining regular effective communication, positive attitude, good time management, accountability, etc.

RTITI assists applicants in developing these skill areas, until they meet the quality standards that are a hallmark of Relationship Toolshop® programming.

UNIVERSAL RELATIONSHIP TOOLSHOP® LEADER CODE OF ETHICS

All RTLeader Applicants and re-activating RTLeaders agree to uphold the following *universal* standards and practices:

- I have read the Introduction and sections of the *Relationship Toolshop® Standards & Practices Manual* relevant to the leader certification type I have chosen to pursue/receive/renew. I agree to be a professional and ethical Relationship Toolshop® Leader who abides by the Code of Ethics outlined by my professional/credentialing board or [NCFR/CFLEs](#) and the current edition of this “*Standards and Practices Manual*.”
- Despite my personal beliefs, I will accurately present information from *Toolshop®* programs and resources and will endorse, model, and use the Universal Blueprint®'s skills, principles and guidelines with the utmost integrity.
- I agree to honor all intellectual property and copyright laws specific to the type of Leader Certification I have that pertain to *Toolshop®* materials in any form (print, audio, video, or any other format currently in existence or that is developed in the future). This includes agreeing not to reproduce (photocopy or otherwise) an entire *Toolshop®* book/resource or entire chapters. (See Part VI: Expert and Part III: Direct Service Providers (Advisors & GFs) for specific guidelines.)
- I will uphold the RTITI NDA and not take what I learn from RTITI and use it to create similar programs or resources that could potentially compete with any RTITI service, product, or resource.
- I agree to abide by any agreements I make, such as contract deliverables and financial, training or reporting deadlines, and timely submission of all affiliate/referral or service fee splits, as outlined in the Relationship Toolshop® non-disclosure agreement, *this S&P Manual*, and any other related agreements.
- I agree to be an ethical, responsible, professional representative of Relationship Toolshop®. I understand my certification or license can be terminated or revoked if I violate this agreement, any *S&P manual* policies, *Toolshop®* core principles, or ethical professional practices.
- If I decide to discontinue my Leader training, I will contact the RTITI Leader Coordinator and explain my reasons. I understand there are no refunds if I quit. (See the Terms of Service and Payments.) I further understand that anyone who consistently misses or delays deadlines *or* drops out of this training *and* avoids contact with RTITI *or* fails to inform RTITI of such a decision in a timely, open, honest, responsible and professional manner will automatically be classified as Terminated or Revoked and will jeopardize their opportunity to become or remain a certified RTLeader.

LEADER MONITORING

Once you have completed RTLeader certification training, RTITI reserves the right for another certified RTLeader to observe you in practice, with or without prior notice, during your probationary period or after final certification.

LEADER VIOLATIONS/PENALTIES

The S&P Committee establishes RTLeader standards and practices, reviews possible violations, and decides/administers any necessary disciplinary action.

The following action/s could result in penalties, disciplinary action, or revocation of any RTLeader's certification:

1. Violating any of the standards set forth in the S&P Manual, "Leader Code of Ethics," "Certification Refusal Clause," or any other signed contracts/agreements between an RTLeader and RTITI.

Reason: The S&P Committee wrote the S&P manual and its Leader Code of Ethics to protect the positive reputation and integrity of RTITI, the Toolshop® and Universal Blueprint® brand names and to insure all Relationship Toolshop® programs/services provide consistent quality programming. Poor performance by any Leader can negatively affect and reflect on other Leaders. When submitting the Leader Application or Annual Report, RTLeaders confirm their prior notice about the standards and expectations of being an RTLeader (which includes the "Code of Ethics"), agree to uphold these standards, and understand the penalties that can occur if they violate these policies or other agreements they enter into with RTITI.

Clarification: "Unprofessional" conduct includes but is not limited to: non-compliance with standards & procedures, refusing to make payments or submit fee splits, gossiping, and avoiding clear, honest, direct communication when there is a concern. These can create even bigger problems and destroy relationships built on trust, rather than clarifying issues and reaching win/win solutions. Therefore, **the S&P Committee expects that any concerns a leader has or claims, disputes, or other differences between leaders or a leader and any RTITI team member shall be resolved as follows:**

1. First attempts shall be between the two parties using *direct* communication. This shall be done face-to-face in person or via electronic means or phone communication if that's not possible. This conversation may be recorded with the permission of both parties and written communication may follow this conversation, to document facts and agreements to solutions. *Exclusively* using written communication (i.e., letters, emails, texts, etc.) to express emotions or talking to *someone other than the person(s) involved* can cause miscommunication, misunderstandings, and new or bigger problems, so it is therefore *strongly* discouraged.
2. If unresolved, both parties (depending on the issue) will meet with the RTITI S&P Committee for review and advice. The committee shall attempt to mediate the issue, since this is one of their primary responsibilities. The S&P committee shall make recommendations as to possible win/win resolutions and the parties will be expected to do their part to resolve the issue or the committee can determine any appropriate disciplinary action or certification status changes. Generally, their actions will follow the same options as for all S&P violations:
 - First offense: verbal/written notification of violation.
 - Second offense: written warning and/or disciplinary probation.
 - Third offense: certification revocation.

Under no circumstance shall the S&P committee met with only one party to discuss another party who isn't present or allow step 2 above to occur before step 1 has been attempted. If this occurs, it could further damage relationships between leaders.

2. Failure to meet any recurring payment or make the monthly minimum performance fee on time.

Reason: RT Leaders receive services from RTITI that have value. RTITI doesn't normally charge RTLeaders separately for these services (i.e. personalized coaching, proofreading, etc.) and some leaders may not avail themselves to the services being offered to all leaders. Nevertheless, the services have value, are being paid for and provided by RTITI, and are made available to all leaders, regardless of its current budget or cash flow. This demonstrates RTITI's commitment to fulfilling its part of the service agreement. Therefore, RT Leaders need to fulfill their part of the agreement by paying their fees on time, which helps RTITI continue to meet its agreed responsibilities to all RT leaders.

Action:

- 1st month missed:
 - RTITI will start *tracking* 20% interest on the outstanding balance, plus the services RTITI provides the RT Leader at a \$200/hour value.
 - After one week, the tracked fees will be sent to the RT Leader who missed the recurring payment as a reminder of services received and the value of those services along with notification that services will stop when the total of past-due monthly fees + interest + value of services provided totals \$3000 and that if a 2nd payment is missed, the RT Leader will receive no further services, even if they have not reached the \$3,000 mark in the value of services received.
- 2nd month payment missed:
 - RTITI will stop providing services to the RT Leader, send the RT Leader the tracked total to date of the past-due monthly fees + interest + value of services provided by RTITI and give the RT Leader notice that:
 - a. No further direct services will be provided until all past-due payments are made and
 - b. If a 3rd month is missed, the entire tracked amount will need to be paid *in addition* to their upcoming fees *even if they resign*.
 - c. If the RT Leader pays the past-due fees within 48 hours of the notice, no service fees will be charged.
- 3rd month payment missed:
 - RTITI will send the RT Leader an invoice for the total amount of past-due fees + interest + value of services provided by RTITI since payment was missed. RT Leader will be given the option to set up a “payment plan” to pay this invoice.
 - Disciplinary action by the S&P committee: the leader will be placed on Disciplinary Probation and be unable to provide any leader services until their account is brought into balance.
- Any subsequent months
 - S&P Committee will help determine if the RT Leader will have their leader License revoked or be forced to be inactive until payment is received for past-due monthly fees + interest + value of services provided by RTITI since payment was missed.

RTITI may file a Small claims suit (in Warren County, Ohio) against the RT Leader for the unpaid past-due monthly fees + interest + value of services provided by RTITI since first payment was missed, up to \$3000.

LEADER ACTIVITY STATUS CATEGORIES

Although “lifetime” certification refers to the *training* RTLeaders are eligible to receive, as long as they are an Active leader, the “license” to use, teach, or create content based on the UB® and Toolshop® teachings is renewed annually. There are several "status" categories that apply to all RTLeaders and, in a parallel way, to training participants. They represent the conditions under which a leader’s certification is

active or ended. *Who* ended it isn't the determining factor, but rather *why* it ended and whether there are concerns that RTITI's wants flagged for the future.

- **Active:** Although a leader will state an intention to be "Active" the following year, to receive the related services and benefits, the leader must actually *be* active. Payment alone cannot keep them active. RT Leaders are expected to demonstrate *four* criteria:
 - **They document their use of their certification** (tracking number and duration of advisory sessions and classes/workshops, marketing efforts for all, and target tasks and deadlines met by Experts.)
 - Advisors do 2 coaching sessions/yr. and submit client service hours and contact info to RT.
 - GFs do at least 1 full-length classes/yr., plus 2 topic workshops. Document attendance of 4+ people and evaluations. (First 5 full-length classes after cert + 1/yr. should have skill assessments.)
 - These can be free sessions/workshops, with options for income-generating offers (sell a book, register for a class, etc.) (*So not required to make a certain income, but to just be active, assuming income may follow.*)
 - **Performance** in their services, determined by evaluations and skills assessments for coaching and classes.
 - **Engagement and communication with the company**, by checking in the required number of times based on type of certification *and* displaying open, honest, *direct* professional communication about any concerns.
 - Actively report to RTITI and regularly attend leader support webinar or have regular communication updates and discuss concerns on a regular basis (the minimum stated per each type of certification).
 - **Continuing education** in that field, which can include watching/utilizing Toolshop® training materials. Most CEU requirements ask for 30-40 hours every 2 years. RT will ask for 10 hrs. each year. Documentation includes completing existing review questions or action guides. Articles: link to article, summary of what learned and how you can use it in your professional practice. Length is when printed.)

RTLeaders who meet the qualifications to be on Active status earn the following **privileges**:

- Can use it for 1:1 coaching as an Advisor, teach the UB® to groups as a GF, and repurpose UB® content as a RT Expert co-author.
- Can refer to or use Toolshop® and Universal Blueprint® registered trademark brand names in their publicity or name of class.
- Can use "Certified Parents Toolshop® [Leader Type]" as an active credential on their resume, title, signatures, and publicity.
- Are on active leader lists and are sent all correspondences for active leaders.

Responsibilities:

- Pay any liability insurance fee splits and license renewal fees appropriate to their certification type. (Privilege 1 above.)
- Are active members of the leader team, taking turns or doing their part in activities or responsibilities requested of all leaders. (I.e. facilitating graduate or parent support call/webinars, being leader pre-certification liaisons, etc.)
- Stay current with the most updated Toolshop® teachings.

- Be accountable by checking in with the Leader Coordinator, leader webinar, Jody or S&P member on a monthly basis if Expert and quarterly if DSP.
- Submit an annual report and pay all required fees and fee splits on time.

If a leader does not achieve the above goals and doesn't document their efforts (example, screenshot of publicity done, like free event listings in newspaper or FB ad), they will automatically have their status changed to "Inactive" the following year, then have 2 years to reactivate. To reactivate, they pay the license renewal fee and promise to try to achieve the goals again. (Training & support is available during monthly webinars and 1:1 coaching is available for fee.)

"Active" is an annual status. So if you receive a benefit as an "Active" leader and become Inactive, you may lose that benefit. Anything that is a "lifetime" benefit will also end, as it's conditional upon being an Active leader only lifetime benefits going forward are existing cert trainings & support available during monthly webinars.

- **Inactive:** These RTLeaders maintain their certification but are not *licensed* to regularly, actively, or directly provide Toolshop® programs / services. RTLeaders can choose to go inactive at any time, but will be asked annually to confirm their status just prior to determining liability insurance coverage. Failure to submit an Annual Status Report or their portion of the annual liability insurance premium will result in an RTLeader's status being changed to "Inactive." This status change could result in other consequences, depending on the type of certification held. If a leader is Inactive more than two years, their status changes to Expired or Terminated, depending on whether RTITI has any issues about the leader returning in the future.

Privileges:

- *Cannot* teach the UB® to groups as a GF, use it for 1:1 coaching as an Advisor, or create any content that teaches the UB® as an Expert *anywhere* (even outside RTITI in non-Toolshop® businesses or roles).
- *Cannot* refer to, name or use Toolshop® and Universal Blueprint® registered trademark brand names in their publicity or name of class. Cannot use Toolshop® teachings as the primary or core teachings in other programs they provide.
- *Can* use "Certified Parents Toolshop® [Leader type]" as a credential on their resume, title, signatures, and publicity, adding "Inactive status" where used.

Responsibilities:

- Do not need to pay any liability insurance fees.
- Are exempt from leader team responsibilities such as taking a turn as part of graduate and parent support call/webinar facilitators.
- Stay on leader list for two years but are not sent correspondence for active leaders.
- Can reactivate at any time in the first two years.
 - May need to pay a fee to be added to the liability insurance policy mid-year. This may be a pro-rated rate, determined by the insurance company.
 - May need to review training programs for most updated teachings.

- **Expired:** An RTLeaders status can “expire” if that leader remains “Inactive” for more than two years or fails to submit an Annual Status Report (which changes their the RTLeader status to Inactive).
 - *If there were no concerns about the Leader’s performance* while actively certified, the Leaders status will be changed to “Expired.”
 - *If there were concerns,* the S&P Committee may decide a different status change.

Once a Leader’s status changes to "Expired," there will be a \$300 reactivation fee to reinstate their certification. (This covers RTITI’s costs to reactivate their liability insurance, recover their Leader materials, add them back into the database and Leader list, etc.) There may also be a requirement to attend a Leader certification or Toolshop® training as a refresher, prior to re-activating their license.

If Leaders do not renew their license within 2 years of their expiration date, they *must* begin the *entire* certification process again.

Privileges:

- *Cannot* teach the UB® to groups, use it for 1:1 coaching or create *any* content for *anyone* (themselves, their private businesses, or other businesses) that teaches the UB® or a similar plan, as that’s not only a violation of the RTITI NDA but also of copyright laws.
- *Cannot* refer to, name or use Toolshop® and Universal Blueprint® registered trademark brand names in their publicity or name of class or use Toolshop® teachings as the primary basis for any programs they develop or provide.
- *Cannot* use “Certified Parents Toolshop® [Leader type]” as an active credential
 - Can say “former,” if they choose, and can put the start date and expiration date in their resume.
- Are removed from the leader list.

Responsibilities:

- If they want to reactivate, they must pay reactivation fee, review all current class curricula for updates and retake the graduate and leader skill assessments.
 - If they do not reactivate within 2 years of expiration date, they must restart the entire certification process again, to be sure they know and will teach most current teachings.
- **Disciplinary Probation:** Should “Disciplinary Probation” be necessary, it will last for a period of six (6) months. Then, a final decision will be made: *either* concern about the RTLeader’s violation is resolved and full RTLeader status is restored or the problem is unresolved and the Leader’s certification is revoked.

TERMINATION POLICIES

Withdrawal, Resignation & Termination Policies

Leaders who withdraw from the program will lose access to all Toolshop® memberships, training programs and resources and may also result in being prohibited from enrolling in ANY Toolshop® Training program in the future, unless or until following procedures outlined in this *most current edition*

of the S&P Manual based on their status (i.e. terminated, revoked, etc.) and being granted permission/approval from the Standards & Practices Committee.

When a leader resigns, was in good standing, RTITI didn't have any concerns about the leader, and would welcome the leader back without any concerns, their status will be changed to either Inactive or Expired, depending on when the leader resigns (beginning or end of Inactive grace period).

If a leader resigns and RTITI does/did have concerns that would need resolved before considering allowing the leader to return, the leader's status will be one of the following:

- **Terminated:** This status is given to RTLeaders when RTITI has/had concerns about the Leader's performance during their certification period, but would be willing to consider relicensing *if* these concerns were addressed *first*.

If termination occurs, a Leader must wait at least one year to request reinstatement. Then, the Leader must first resolve the concerns RTITI had about his/her performance, appear before the S&P committee during a private "ethical review" meeting and receive *unanimous* approval for reinstatement from the S&P Committee. The Leader may need to repeat any parts of the certification process the S&P Committee requests, including any pre-certification courses (i.e., T.I.P.S. or F.I.R.S.T.), Leader certification programs, or the entire training process, from the beginning, for half-price.. They must also pay a fee for reinstatement, including their share of the liability insurance and any balance between what they originally paid and what the current certification fee rate is.

- **Revoked:** This status is given to RTLeaders when RTITI has/had serious concerns about the Leader's performance during their certification period, and would *not* be willing to consider relicensing under any circumstance.

Separation Procedures

As stated in the [Non-Disclosure Agreement](#), which is signed before being given access to *any* of the pre-certification orientation (Leader Inquiry) materials and this *Standards & Practices Manual*:

- The exiting Leader shall return all Confidential Information received in written or tangible form, including copies, or reproductions or other media containing such Confidential Information, within ten (10) days of such request or at the termination of official business relationship with Disclosing Party. RTITI can provide a pre-paid shipping label upon request.
- After returning all masters and copies, Receiving Party shall delete or otherwise destroy all remaining Confidential Information that remains in Receiving Party's possession, such as on computer hard drives, iPods, cell phones, Blackberries or any other electronic devices that exist now or in the future, and in all email or computer trash/recycle bins. This process needs verified using one of the following procedures:
 - Webinar with a RTITI S&P representative where the leader's computer screen is shared and deletion of files and clearing recycle/trash bin is witnessed.
 - Leader can create a screen capture video (i.e. [using free service](#)) showing deletion of files and clearing recycle/trash bin.
- The Leader shall provide one of these visual verifications to the S&P Committee within ten (10) days after the termination of the relationship with RTITI or of RTITI's request to return all company materials. (RTITI can provide written directions and certificate.)
- The exiting leader agrees not to:
 - Generate income by continuing to provide proprietary copyrighted Toolshop® programs/

- Share any Toolshop® teachings without proper citations, and *cannot under any circumstances* teach the UB®, in part or whole, or by any other name, or in their own words.
 - Attempt to replicate or create new programs/resources based on or similar to RTITI's copyrighted content, especially its proprietary Universal Blueprint® system and its tools, without proper authorization from and compensation to RTITI.
 - Use any confidential information or copyrighted content received from RTITI as a basis upon which to develop or have a third party develop a competing or similar product or program.
 - Replicate any Toolshop® business or content systems or reverse-engineer them for the purpose of building a business that could potentially compete with RTITI or violate intellectual property protection laws.
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This *Standards and Practices Manual* provides the most *detailed* information about the various forms of Relationship Toolshop® instructor certification. Publicity materials and application packets may only offer summaries, for reader-friendly information to assist in deciding to get more information about this unique career-building opportunity.

To continue reading the *Standards & Practices Manual*, go to: <http://relationshiptoolshop.com/leader-training/applicant-info/leader-applicant-information/> and click the link for other sections:

Part I: Introduction

Part II: Content Contributor (Non-Leader Opportunity)

Part III: DSP Universal Policies (Direct Service Providers)

Part IV: Advisors

Part V: Group Facilitators

- A. Group Facilitators: Private Consultant providing training programs to the Public
- B. Group Facilitators: Employees of Non Profit Organizations providing Toolshop® training programs to their own clients

Part VI: Speaker Bureau Policies

Part VII: Trainer-Of-Trainer Certification Process

Part VIII: Certified Relationship Toolshop® Expert

Jody Pawel, the author of The Parents Toolshop® and founder/President of Relationship Toolshop® International Training Institute, and the Standards & Practices Committee hope this manual has answered any questions you have about being a Relationship Toolshop® Leader. If you have any further questions or concerns, feel free to contact the Standards & Practices Committee at S&Pcommittee@RelationshipToolshop.com or (937) 748-4541.



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