



International Society for
Performance Improvement

APPLICANT HANDBOOK



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INTRODUCTION

The Artificial Intelligence for Performance Improvement (AI4PI) certification program, offered by the International Society for Performance Improvement (ISPI), is designed to validate the expertise of professionals who apply AI responsibly to enhance human and organizational performance. Rooted in ISPI's standards and the AI4PI Framework, this certification recognizes practitioners who integrate AI technologies in ethical, human-centered, and results-driven ways.

The **Certified AI4PI Technologist (CAIT)** is a **specialized Certification** that focuses on the application of AI tools and methods within the Performance Improvement (PI) discipline. It validates that a professional can design, implement, and evaluate AI-enabled performance interventions using the AI4PI framework.

The CAIT credential is awarded upon successful completion of one applied performance improvement project. An AI4PI project is a real-world initiative where the candidate uses AI to solve a performance problem. The project must demonstrate the candidate's ability to:

- Design an AI-enabled solution aligned with organizational needs and ethical standards.
- Implement the solution within a performance context, ensuring data integrity, governance, and human oversight.
- Evaluate the solution's effectiveness through measurable improvements in individual, organizational, or societal performance.

This handbook provides detailed guidance on the certification process, requirements, and evaluation criteria for earning the CAIT credential.

The Premise for CAIT

This AI4PI Certification is founded on the idea that professionals should use AI technologies to improve performance while maintaining ethical standards and best practices. It guarantees that professionals have the necessary skills to implement AI solutions that are efficient, effective, ethical, and human-centered.

An AI4PI project is a performance improvement initiative that integrates artificial intelligence as a solution, designed, implemented, and evaluated in alignment with the AI4PI Framework to achieve measurable improvements in human or organizational performance.

The **Certified AI4PI Technologist (CAIT)** is a **specialized certification within the Certified Performance Technologist (CPT) program**. It validates your ability to apply AI tools *as interventions within the PI process*, using the AI4PI Framework.

CAIT is about showing you can integrate AI responsibly, ethically, and effectively into performance improvement work.

The CAIT, like AI4PI, focuses on **principles** over **tools**. The goal is to validate the professional's ability to **make strategic decisions** about when, where, and how to implement AI solutions using the AI4PI Framework.

ELIGIBILITY

To be eligible for the Certified AI4PI Technologist (CAIT) certification, applicants must:

- Self-attest to having at least 18 months of experience developing and implementing AI solutions for performance improvement.

Application Requirements

To earn the CAIT certification, candidates must:

- Submit a completed application form that includes answers to questions and a supervisor or client attestation.
- Complete the AI4PI Journey and submit a copy of your certificate.
- Submit project artifacts with relevant information and evidence to support the application.
- Sign both the Code of Ethics, Declaration and Release, and the Application Agreement.
- Submit a resume highlighting their professional experience and expertise in AI and performance improvement.
- Pay the application fee.

Application Fees

- Application Fee:
 - \$420 for ISPI members
 - \$598 for non-members.
 - \$250 for student members
 - 50% Introductory Discount (Expires 12/31/2026)

There are also special bundles available:

- ISPI Gold Membership + CAIT = 25% discount
- ISPI Gold Membership + CAIT + Conference Registration = 25% discount

Recertification (Every 3 Years)

- Non-Gold Members: \$275
- ISPI Gold Members: \$175
- Student Members: \$125



PART ONE: THE APPLICATION PROCESS

Planning to Apply

Preparing your application for the AI4PI Certification involves several steps:

1. **Read the entire CAIT Applicant Handbook:** Familiarize yourself with the handbook to understand the application process and requirements.
2. **Choose Projects:** Select a Performance Improvement project that best demonstrates your application of the AI4PI standards as a PI intervention. Ideally, choose projects that cover different aspects of the standards.
3. **Evaluate Your Work:** Use the rubrics provided in Appendix A to self-assess your work against the standards.
4. **Draft Responses:** Write your responses to the questions in the application form, ensuring they are clear, concise, and supported by your exhibits.
5. **Review and Refine:** Set aside your draft for a day or two, then review and refine your responses. Request feedback from colleagues if possible.
6. Complete the required application documents.
7. **Submit Your Application:** Once you are satisfied with your application, submit it along with the required fee.

Tips for Success

Use this checklist to ensure that your application is complete:

Check	Application Submission Includes	Comments
<input type="checkbox"/>	Candidate Information and Signatures	Ensure that legal signatures are included.
<input type="checkbox"/>	Certification Application Form	Submit as a .docx.
<input type="checkbox"/>	AI4PI Journey Certificate	Submit as .pdf
<input type="checkbox"/>	Attestation from a supervisor or client	Submit as a .docx or .pdf.
<input type="checkbox"/>	Application fee	If you have not submitted the fee payment, please complete this step. Go to ispi.org and click on <u>Certifications</u> .



Documents sent to certification@ispi.org

Use the email subject line: "ID Application for <insert your name here>"

Example: "ID Certification Application for AJ Sample"

Attesters

As part of the application process, you must request a letter of attestation from your project supervisor or client-sponsor. This letter should confirm your involvement in the project and the quality of your work. Below is a sample letter you can use as a template:

Attester Letter Template

Dear [Attester's Name],

I am applying for the Certified AI4PI Technologist (CAIT) certification from the International Society for Performance Improvement (ISPI). As part of the application process, I need to provide an attestation of my work on a project that demonstrates my ability to apply the AI4PI standards (<https://www.ispi.international/ai4pi>).

I have enclosed the necessary forms describing the work I performed, along with supporting documentation and the related standards. Please review and sign the form, attesting that I completed the work as described and that the data accurately reflects the improvements resulting from that work. There is also a place for any comments you would like to make.

Thank you for your assistance. This certification is a vital component of my professional development, and your attestation is essential to my application.

Very truly yours,

[Your Name]

Attestation Form

Please copy and paste the following information into a separate document, fill out the candidate section, and provide it to your attester for signature.

Candidate Information:

Project Name

Candidate Name

Candidate Role

Enter the role you played

Attestation Statement:

I have read the standards for the Certified AI4PI Technologist, and the work descriptions submitted to me. I have sufficient knowledge of the project and can judge the quality of the work being performed. I attest that:

- The candidate performed the work described.
- The work description is accurate.
- If the candidate was a member of a team, their contributions were significant enough to demonstrate the standards.
- Throughout the process, the candidates conducted themselves ethically and were honest in their representations.

Attester Information:

Attester Signature: _____

Date: _____



PART TWO: CANDIDATE INFORMATION

Candidate Details

Please provide the following information:

First Name

<i>Middle Name or Initial</i>	
<i>Last Name</i>	
<i>Organization</i>	
<i>Job Title</i>	
<i>Street Address</i>	
<i>City/State/County/Zip Code</i>	
<i>Phone</i>	
<i>Email</i>	
<i>Name as you would like it to appear on the Certificate and Badge.</i>	

Employer Notification

If you would like ISPI to send your supervisor a letter notifying them of your certification, please provide the following information:

Supervisor's Name

<i>Job Title</i>	
<i>Organization</i>	
<i>Address</i>	

City/State/Zip Code

Supervisor Email

Code of Ethics

As a Certified AI4PI Technologist (CAIT), you agree to adhere to the following Code of Ethics:

- **Add Value:** Conduct yourself and your work in a manner that adds value to clients, their customers, and the global environment.
- **Collaboration:** Work collaboratively with clients and users, functioning as a trustworthy strategic partner.
- **Continuous Improvement:** Engage in activities designed to continuously improve your proficiency in the field of AI and performance improvement.
- **Integrity:** Be honest and forthright in your representations to clients, colleagues, and others with whom you may come in contact.
- **Confidentiality:** Maintain client confidentiality.
- **Conflict of Interest:** Avoid any actual or semblance of conflict of interest from which you will or may derive benefits not equitably offered to others.

Signature: _____

Applicant Acceptance

Declaration and Release

Please read the following statements carefully:

- I understand that the information gathered during the certification process may be used by ISPI for statistical purposes, including the evaluation of the certification program, as well as for other research or studies.
- I understand that ISPI staff and Application Reviewers will follow privacy protection or nondisclosure procedures to keep the information in their possession confidential.
- I agree to inform ISPI immediately of any changes in circumstances that may affect this application, the information I have provided, or my continuing eligibility.
- I understand and agree that ISPI owns all rights, titles, and interests in and to all names, trademarks, logos, copyrights, applications, and other materials related to the Certified AI4PI Technologist credential.

- I agree to use such intellectual property only in accordance with the policies promulgated by ISPI and to cease using it upon the expiration, suspension, or termination of my certification.
- I understand and agree that ISPI makes no claims, warranties, guarantees, or promises regarding the content or performance of any applicant, and I agree not to misrepresent my certification status and its meaning.
- I do hereby attest to the accuracy and validity of, and assume full responsibility for, the content of the application and all materials and information used by me in support of the application, and all use thereof by third parties.

Signature: _____

Application Agreement

I am applying for the Certified AI4PI Technologist certification. I affirm that I have met the minimum requirements of 18 months of experience in the development and implementation of AI solutions for performance improvement.

If awarded the certification with a digital badge, I understand that I:

- Will be requested to post the CAIT digital certificate in electronic media and maintain a connection between that digital badge and the database with badge metadata.
- Will be required to renew every three years to retain this certification.
- I agree to allow ISPI to use my name and company affiliation in announcements regarding the AI4PI Certification Program.
- Agree to use the certification mark and badge only as approved by ISPI.
- Acknowledge that misuse or misrepresentation of the designation may result in forfeiture of the designation.

I attest that I performed the work described in this application. If a team completed any of the work I have cited, I attest that my contributions to the effort were significant enough to demonstrate proficiency. In my practice, I agree to conduct myself in accordance with the Code of Ethics. I agree to adhere to a set of rules to accurately represent my credentials to employers and customers. I understand that obtaining the AI4PI certification credential indicates that I have met the standards, as evidenced by my past work, and is neither an endorsement of me for future work nor a guarantee of future performance.

I further understand that:

- The AI4PI standards and process for achieving and maintaining the AI4PI certification may be revised periodically.
- An incomplete application will be returned to the applicant.

- Applications containing erroneous or misleading information may result in denial of the application, revocation of certification, marking, and digital badge, and forfeiture of the application fee.
- ISPI is not responsible for lost or damaged application materials.
- This application and all accompanying and subsequently submitted materials will become the property of ISPI upon submission.

If my application is not accepted, I understand that I will be notified which standards were not met. I will meet those specific standards within the next 12 months without incurring any additional charges beyond the balance of the original submission fee. After the original submission and one resubmission, I may be charged a re-review fee of up to \$100, depending on the amount of work required to review the resubmission.

Appeal

I also understand that, if I am not selected for the AI4PI certification, I have the right to appeal this decision to ISPI within 60 days of receipt. If I decide to appeal the decision, another impartial reviewer will evaluate my application.

I attest that I have read and agree to the Application Agreement. I hereby authorize ISPI to contact the individuals who will attest to the quality of the work I described in this application.

By checking the box below, I agree to the terms in the Code of Conduct, the Declaration and Release, and the Application Agreement.

- I agree with the terms and conditions.

Signature: _____

Date: _____



PART THREE: THE CAIT APPLICATION

Demographics and Experience

Please specify the industry or industries in which you have implemented the AI4PI projects.

Enter your current employment status: _____

- Full-Time Employee
- Not currently employed
- Retired
- Part-time employee
- Full-time external consultant
- Part-time external consultant
- Other (specify): [Other Employment Status]

Enter the item that best describes your role: _____

- Academic
- Artist/Talent (Graphics, video, audio)
- Learning professionals
- Performance consultant
- IT professional
- HR professional
- Project/Program Manager
- Subject Content Expert
- Other (specify):

Enter the description that best matches your educational experience (select the highest level that applies):

- High School Graduate
- Technical Training beyond High School
- Some College, but no degree
- 2-year College Degree
- 4-year College or University Degree
- Master's Degree

- Doctorate Degree

Application Instructions

For each response, please describe how you applied the standard (including your specific project role), provide supporting evidence (artifacts, metrics, or examples), and highlight your impact and lessons learned.

Option 1: Single Project Submission—Complete all 10 standards in one project.

Option 2: Multiple Projects Submission—Submit up to 10 distinct projects, with each project covering at least one AI4PI Standard. Ensure at least three projects per section: Principles, Process, and Evaluation.

NOTE: You may complete the separate Application and submit it instead of using the combined Handbook and Application.

Application of the AI4PI Standards and Process Steps

Your application should demonstrate your experience in applying the AI4PI standards. ([Detailed AI4PI Framework Information](#))

Part 1: AI4PI Principles:

- AI4PI Principle #1: Ensure Human Oversight of AI4PI Solutions
- AI4PI Principle #2: Enforce Data Integrity and Privacy in AI4PI Solutions
- AI4PI Principle #3: Evaluate and Minimize AI-Induced Biases
- AI4PI Principle #4: Establish AI4PI Solution’s Governance and Risk Management Strategies

Part 2: AI4PI Process Steps:

- AI4PI Process Step #1: Determine Needs, Organization’s Readiness and Potential Applications (Discovery)
- AI4PI Process Step #2: Define Efficient and Effective Human-Centered AI4PI Solutions
- AI4PI Process Step #3: Design and Develop AI-Human Collaboration
- AI4PI Process Step #4: Document AI Accuracy and Trustworthiness
- AI4PI Process Step #5: Deploy and Audit the AI4PI Solution

Part 3: AI4PI Evaluation Process Step

- AI4PI Process Step #6: Demonstrate Outcome and Overall Impact

There are two options for you to complete the application:

Option 1: Select one project you were responsible for and describe how you applied each of the AI4PI Framework’s Principles and Process Steps. Ensure that you provide relevant evidence, key points, and metrics to substantiate your application.

Select this option if you are responsible for most aspects of the AI4PI project design, implementation, and evaluation.

<i>Category</i>	<i>Description</i>	<i>Project Name:</i>
Part 1: AI4PI Principles:		
<i>AI4PI Principle #1</i>	Ensure Human Oversight of AI4PI Solutions	
<i>AI4PI Principle #2</i>	Enforce Data Integrity and Privacy in AI4PI Solutions	
<i>AI4PI Principle #3</i>	Evaluate and Minimize AI-Induced Biases	
<i>AI4PI Principle #4</i>	Establish AI4PI Solution’s Governance and Risk Management Strategies	
Part 2: AI4PI Process Steps		
<i>AI4PI Process Step #1</i>	Determine Needs, Organization’s Readiness, and Potential Applications (Discovery)	
<i>AI4PI Process Step #2</i>	Define Efficient and Effective Human-Centered AI4PI Solutions	
<i>AI4PI Process Step #3</i>	Design and Develop AI-Human Collaboration	
<i>AI4PI Process Step #4</i>	Document AI Accuracy and Trustworthiness	
<i>AI4PI Process Step #5</i>	Deploy and Audit the AI4PI Solution	
Part 3: AI4PI Evaluation Process Step		
<i>AI4PI Process Step #6</i>	Demonstrate Outcome and Overall Impact	

Option 2: Select this option if your role was limited to specific aspects of the AI4PI implementation.

In this case, please include:

- At least three projects covering Part 1 (4 projects). A project can be applied to more than one principle. The goal is to have one project for each principle.
 - Example: Principle 1: Project 1; Principle 2: Project 1; Principle 3: Project 2; Principle 4: Project 3

- At least three projects covering Part 2 (5 projects). A project can be applied to multiple process steps. The goal is to have one project for each process step.
 - Example: Process 1: Project 1; Process 2: Project 3; Process 3: Project 5; Process 4: Project 3; Process 5: Project 1
- At least one project covering Part 3 (Evaluation) (1 project).
 - Example: Evaluation: Projects 1, 3, 5

Ultimately, each section must include at least three projects. These projects can either cover different AI4PI standards or be distinct projects within each section.

If your role was **limited to specific aspects of the framework**, please submit at least one project for each of the 10 principles and process steps. A project can be applied to multiple process steps.

Example:

<i>Category</i>	<i>Description</i>	<i>Project Name:</i>
Part 1: AI4PI Principles:		
<i>AI4PI Principle #1</i>	Ensure Human Oversight of AI4PI Solutions	Project 1, Project 3
<i>AI4PI Principle #2</i>	Enforce Data Integrity and Privacy in AI4PI Solutions	Project 1
<i>AI4PI Principle #3</i>	Evaluate and Minimize AI-Induced Biases	Project 4
<i>AI4PI Principle #4</i>	Establish AI4PI Solution’s Governance and Risk Management Strategies	Project 4
Part 2: AI4PI Process Steps		
<i>AI4PI Process Step #1</i>	Determine Needs, Organization’s Readiness, and Potential Applications (Discovery)	Project 2, Project 4
<i>AI4PI Process Step #2</i>	Define Efficient and Effective Human-Centered AI4PI Solutions	Project 5
<i>AI4PI Process Step #3</i>	Design and Develop AI-Human Collaboration	Project 3
<i>AI4PI Process Step #4</i>	Document AI Accuracy and Trustworthiness	Project 2, Project 3, Project 4

<i>AI4PI Process</i> <i>Step #5</i>	Deploy and Audit the AI4PI Solution	Project 1
<i>Part 3: AI4PI Evaluation Process Step</i>		
<i>AI4PI Process</i> <i>Step #6</i>	Demonstrate Outcome and Overall Impact	Project 5

Application Projects

NOTE: You may copy and paste the Application Projects and Evidence sections into a new document. Ensure you include all projects required for the CAIT.

Project 1 Name:

Year(s) Work was Completed

<i>Attester's Name</i>	
<i>Your Role in the Project</i>	
<i>Standards Addressed</i>	(Principles 1 – 4; Process Steps 1 – 5; Evaluation Step 6)

Alignment with AI4PI Principles

Describe how your project aligns with each of the Four Guiding Principles of the AI4PI model. Use the provided prompts and considerations to guide your responses for each principle.

Principle 1: Ensure Human Oversight of AI4PI Solutions

1. Explain how your project ensures that AI decisions are transparent and understandable to all stakeholders.
2. Describe how you demystify AI processes and outcomes so that everyone involved can comprehend and trust the AI's recommendations.
3. Explain how human oversight and the ability to interrupt AI processes are integrated into your solution.
4. How does the new approach redefine performance excellence through a productive, symbiotic relationship among workers, the work, the workplace, and AI?

Principle 2: Enforce Data Integrity, Protection, and Privacy

1. Explain how data is collected, prepared, and managed to ensure its quality, relevance, and security.
2. Describe measures to protect data provenance, confidentiality, and evidence-based decision-making.
3. Explain how your project ensures data privacy and does not share data with public AI tools or models.

Principle 3: Evaluate and Minimize AI-Induced Biases

1. Identify any potential ethical or social biases you uncovered.

2. Describe the steps you have taken to mitigate these biases and promote fairness, equity, and accuracy in your AI4PI solution.
3. Explain how you ensure your AI tools do not perpetuate discrimination or societal injustices.

Principle 4: Establish Governance and Risk Management Strategies

1. Explain how your project incorporates governance processes to manage and mitigate risk, including categorizing the level of AI risk (low, high but manageable, unacceptable).
2. Provide examples of how you manage and monitor risk, including adaptive features to maintain safe, transparent AI practices.
3. Explain how your project ensures AI applications are transparent about their non-human nature (self-declaration).
4. Describe how you protect users from harmful AI practices (manipulation, discrimination, disinformation, etc.).
5. Describe how your project engages in dialogue and promotes individual, organizational, societal, and environmental well-being through AI4PI.

Alignment with AI4PI Process Steps

Detail the execution of your project through Steps 1 to 5 of the AI4PI Framework. Use the provided prompts and considerations to guide your responses as you describe how your project aligns with each step.

Step 1: Determine Needs, Readiness, and Potential Applications

1. Describe the specific performance problem that your project aimed to solve.
2. How did you identify the need for an AI-driven solution?
3. How did you conduct a performance analysis to reveal the root causes and quantify the performance gaps?
4. How does the scope of your AI4PI solution align with the intersection of AI and Human Performance Improvement (HPI)?
5. How did you assess your organization's readiness to adopt and sustain an AI4PI solution, including potential challenges and resistance?
6. How did you identify how AI could augment individual workers and teams, reorganize workplace systems, and/or have a broader societal impact (three levels of needs/opportunities: workers/individuals, work/workplace systems, and society/mega impact)?

Step 2: Define Human-Centered AI4PI Solutions

1. How did you design your AI4PI solution to meet the specific needs, opportunities, and root causes identified in Step 1?
2. How did you customize the AI4PI solution using techniques like shot prompting, Retrieval-Augmented Generation (RAG), fine-tuning, or prompt engineering?
3. How did you ensure the AI4PI solution was aligned with the organization's evolving requirements and future needs?
4. How did you address the unique factors of your organization and performance environment in the design?

Step 3: Design and Develop AI–Human Collaboration

1. Describe how you designed the human-AI interactions and the user interface to ensure ease of use, usability, and contextual relevance.
2. How did you incorporate user input and feedback into the AI interface and overall AI4PI solution?
3. How does the solution enable a natural and productive interaction at the point of need?
4. What considerations were made to ensure that the AI4PI solution complements and enhances unique human skills?
5. Provide specific examples of how workers, users, or stakeholders were involved in the design and testing processes.

Step 4: Document Accuracy and Trustworthiness

1. How did you ensure and measure the accuracy and reliability of the AI4PI outputs?
2. Describe the validation, testing, and stress-testing processes used to confirm the AI's performance.
3. How did you capture corrections and expert feedback to fine-tune the AI and reduce hallucinations?
4. How was a confusion matrix or similar metric used to evaluate the performance of your AI4PI solution?
5. How do you ensure that performance and accuracy improvements are continuously integrated into the AI4PI system?

Step 5: Deploy and Audit the AI4PI Solution

1. Describe how the AI4PI solution was deployed and integrated into existing workflows.
2. How did you manage organizational change and ensure smooth adoption of the AI4PI solution within the organization?
3. What audit mechanisms or review processes were put in place to ensure the AI4PI solution aligns with organizational, ethical, and societal standards?
4. How do you continuously monitor and verify that the AI4PI solution functions as intended, safeguards data privacy, mitigates bias, and maintains overall technical robustness?

5. Provide examples of how performance, data protection, bias mitigation, and risk audits are conducted to foster a culture of accountability and trust in AI.

Step 6: Demonstrate Outcome and Overall Impact

Performance Metrics:

1. What key performance indicators (KPIs), both quantitative and qualitative, were used to evaluate the success of your AI4PI project?
2. How were these metrics selected to reflect individual, organizational, and societal performance improvements?

Results and Outcomes:

1. Provide a detailed account of the tangible results and improvements your project has made.
2. How did AI contribute to these measurable performance gains?
3. Were there any unexpected or intangible benefits realized during or after deployment?

Anticipated Impact and ROI:

1. How does AI impact workers' skills, workflows, and overall job satisfaction?
2. What tangible benefits (e.g., efficiency gains, error reduction, faster time to market) has your AI4PI solution delivered?
3. What intangible benefits (e.g., improved customer satisfaction, enhanced brand reputation, employee engagement) have emerged?
4. Identify any positive or negative second-order impacts on individuals, teams, organizations, or society that could influence long-term outcomes.
5. How do you incorporate these insights into making informed decisions on future AI investments, balancing risks and benefits holistically?

Project 1 Exhibits

You may provide up to five exhibits that support and supplement your description of work. These may include items such as:

- An excerpt from a document
- A screenshot
- A maximum of 90 seconds of a video clip
- A link to a website (make sure that the ISPI reviewers have the necessary access rights)

Provide only exhibits that support and supplement your description of work.

Formats:

- Documents may be .doc, .docx, or .pdf (.pdf preferred).
- Screenshots may be .pdf or .jpg.
- Videos must be .mpg.
- Website

Place your exhibits in a folder and zip the contents.

Naming:

Please use your initials followed by an underscore, the type of exhibit, and the specific name (if any).

Examples:

- ajm_exhibitone_toolPrototype.docx
- ajm_screenshotone_analysisresults.jpg
- ajm_videoclip_tutorial.mpg

Exhibit Description

<i>File name</i>	Description of file contents	List standard(s) the exhibit supports
1.		
2.		
3.		
4.		
5.		

If you are submitting multiple projects, copy and paste the project description and exhibits section for additional projects.



PART FOUR: SUBMISSION PROCESS

Submitting Exhibits and Forms

Please complete the following steps to submit all completed application materials for the Certified AI4PI Technologist (CAIT):

Save each of your files using the naming convention as follows:

- Name each of your files: YourLastName_CAIT_FileContents
 - File contents may include Completed application, Exhibits (identify as #of#), Attestation letter
 - Examples:
 - Smith_CAIT_Application
 - SmithCAIT_Exhibit1of5
 - Smith_CAIT_Attestation
1. **Upload your completed application and all supporting documents** (exhibits and attestation letter) to a secure cloud storage service or send them to the designated email address. If you upload your documents to a cloud storage service, include a link in your application.
 2. **Submit payment** if you have not already done so.

Within two working days, you will receive an email confirming that access has been confirmed and that payment has been received.

Questions

For any additional support or questions, please get in touch with the Director of Accreditation at certification@ispi.org.

Maintenance and Renewal

Certified individuals must demonstrate continued competence by renewing their credentials every 3 years. This involves earning points through continuing education and service, ensuring that they remain current with advancements in AI and performance improvement.

How to Maintain My Certification?

Certified individuals selecting this option must earn 30 points during a three-year period, which can be achieved through continuing education and service to others.

Continuing education includes participating in courses, workshops, conferences, presentations, professional events, and seminars. Professional events encompass organized gatherings, whether in-person or virtual, that

bring together a cross-section of the field, such as communities of practice, networking meetings, town halls, panel discussions, and similar events. Additional qualifying activities include reading books and articles associated with AI in Performance Improvement.

To receive continuing education points, you must submit an electronic copy or screen-capture of the documentation that includes the event or book title with a half-page description, and the name of the instructor, facilitator, or author; plus, a half-page narrative that reflects what was learned or insights gained from the qualifying activity, continuing education points must directly relate to AI in Performance Improvement.

Continuing Education:

- 1 point for each hour of education or professional event
- 3 points for a half day of education
- 3 points for reading a book related to the certification being maintained
- 6 points for each course or conference day (6 to 8 hours)

Service points can be earned through volunteer work, such as writing for a professional journal or a book, speaking at a professional meeting, teaching, serving as a subject matter expert for a course or credential being developed, participating on a committee, or serving as a public member. Service points require submitting an attestation from a client, supervisor, or professor. To earn service points from an attestation, submit an electronic copy of a 1-2-page letter written by a supervisor, client, or professor who briefly describes the work you have done for them and how that work created value for them.

To earn service points (other than from the attestation), submit a half-page description of the service, including a brief narrative that reflects what was learned or insights gained from the experience. Calculate points as follows:

Service:

- 10 points
 - publishing a book related to the certification specified
 - contributing a chapter to a book related to the certification specified
- 5 points
 - for each year served on a national or international committee
 - teaching a college-level course (semester or quarter)
 - attestation from a client, supervisor, or professor describing the quality of your work for them and the value you brought to their project
- 3 points
 - for each year served on local committees or boards
 - teaching a workshop over a half-day in length
 - writing an article for a juried journal
- 2 points
 - writing a journal article

- 1 point
 - presenting at a conference, professional meeting, or equivalent
 - mentoring an instructional designer/developer in the specified learning-solution type



PART FIVE: EVALUATION RUBRIC

Evaluation Rubric

Your project will be evaluated against **10 standards** (four principles and six process steps from the AI4PI Framework). Each standard is rated at one of three levels:

- **EXCELS** – Comprehensive, well-documented evidence showing mastery.
- **MEETS** – Adequate evidence with minor gaps.
- **BELOW** – Insufficient or missing evidence; remediation required.

Principles Assessed

1. **Human Oversight** – Transparency, explainability, and documented human-AI collaboration.
2. **Data Integrity & Privacy** – Clear data processes, security, and protection of sensitive information.
3. **Ethical AI & Bias Mitigation** – Evidence of bias analysis, mitigation strategies, and ethical considerations.
4. **Governance & Risk Management** – Defined structures, proactive risk handling, and feedback loops.

Process Steps Assessed

1. **Determine Needs & Readiness** – Clear business need, readiness assessment, and change management considerations.
2. **Define Human-Centered Solutions** – Custom, human-centered design aligned with business needs.
3. **Develop AI-Human Collaboration** – Documented, tested prototypes with iterative refinement.
4. **Document Accuracy & Trustworthiness** – Deployment with monitoring, auditing, and user support.
5. **Deploy & Audit** – Tangible/intangible results, KPIs, and second-order impacts.
6. **Demonstrate Outcome & Impact** – Long-term adoption, continuous improvement, and knowledge transfer.

Certification Requirements

- All standards must achieve at least **MEETS** to qualify.
- Any **BELOW** rating requires remediation before certification.
- Applicants submitting multiple projects must demonstrate each standard covered by at least three projects, with 70% achieving **MEETS** or **EXCELS**.

Thank you for your submission. If you have any questions, please email certification@ispi.org.