



IFS Institute

PROGRAM ASSISTANT HANDBOOK



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Note: These processes are based on North American trainings. International processes may vary based on the region. (e.g. Pay, Application Process, PA Selection)

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WELCOME MESSAGE



Katie Nelson

IFS Institute CEO

Welcome to the IFS Institute!

We are delighted that you are interested in being a Program Assistant for one of our IFS Institute programs.

One of the key differentiators of our programs is the low ratio of participants to program staff. This low ratio allows each participant to process their learning and get direct support from an already trained IFS professional. Your role as Program Assistant is vital to the experience of each participant.

Our belief is that the role of Program Assistant, while challenging, also supports your continued IFS journey. Many of us have renewed our passion, learned new things and reinforced best practices as we teach others and learn from our peers. We hope this role is as enriching for you as it is for the participants you will support.

Thank you for your interest. We truly appreciate you being part of our community.

Warmly,
Katie Nelson

CEO, IFS Institute



ABOUT THE PROGRAM ASSISTANT ROLE

Program Assistants (PA) are vital contributors to the success of our trainings. We want to acknowledge the considerable commitment of your time, energy and sharing of skills required to perform your responsibilities throughout an IFS Institute training.

The front-line teaching and integration of the learning happens in the small group practices, experientials and Reflection groups that happen every day in every training. In addition to skill building, participants are also learning from being helped to work with their own systems when parts get activated. This means that as a Program Assistant, you will be:

- Working with activated participants to help them unblend and to learn more about their own systems.
- You will need to work with your own activation, model repair when needed, and support participants from an open-hearted place.



TRAINING FORMATS

LEVEL 1

L1-2

L1-2 Total training hours: 89.5

- Two multi-day sessions, each with an “Arrival Day” that has a 2-hour evening meeting, followed by six full days. Each multi-day session has 40 training hours.
- Two Bridge Days, each with 4.75 training hours. The two separate Bridge Days meet between the multi-day sessions.
 - Multi-Day Session 1
 - Bridge Day 1
 - Bridge Day 2
 - Multi-Day Session 2

L1-3

L1-3 Total training hours: 89.5 (Most Common)

- Three, 4-day sessions that have 26.5 or 27 training hours each.
- Two Bridge Days, each with 4.75 training hours.
- There is one Bridge Day between each pair of 4-day sessions.
 - 4-Day Session 1
 - Bridge Day 1
 - 4-Day Session 2
 - Bridge Day 2
 - 4-Day Session 3

TRAINING FORMATS

L1-4

L1-4 Total training hours: 84 (Mostly International)

- This format is used for online trainings only.
- There are no Bridge Days.
- This format is not approved for CE at this time.
 - Four, 4-day sessions that have 21 hours each.

L1-6

L1-6 Total training hours: 91

- Four, 3-day sessions and two 1-day sessions.
 - This format could be used for online, hybrid, or on-site trainings

LEVEL 2

L2

Level 2 Intensive Trainings

- Deepening and Expanding (D/E)
- Trauma and Neuroscience (T/N)
- Shame, Anxiety, and Depression (SAD)
- A Compassionate Approach to Addictive Processes: IFS Addictions and Eating Disorders (AED)
- Children and Adolescents (C/A)

TRAINING FORMATS

LEVEL 3

L3

Level 3s meet for five consecutive days.

- Online L3 total hours: 27.5 (20 CE, 7.5 Personal Growth)
- On-site L3 total hours (pre-pandemic): 30 (20 CE, 10 Personal Growth)
- **Only online, 27.5-hours L3s are currently being organized.**



OUR PARTICIPANTS



IFSI will publish a brochure for each training that will provide you very important information.

Most training sessions will consist of the following:

- **36 Participants** (33 Participants if the site has space limitations)
 - 3 participants in each triad practice
 - 2 PAs per Reflection group, with 6 Participants
- **Lead Trainer Possibility**
 - 1 Lead Trainer (LT) or 2 Co-Lead Trainers (CLT)
 - (There could also be a Solo Lead or Co-Lead Mentee)
 - 1 Assistant Trainer (AT)
 - 1 Assistant Trainer and 1 Assistant Trainer Mentee (ATM)
- **PA Composition**
 - The LT and AT make every effort to have a balanced mix of experienced PAs and new PAs in each training.
 - There is also effort to diversify the PA staff and Participants based on various demographics and professions with a preference given to clinical professionals and how each participant wants to utilize the model.



PA

REQUIREMENTS

- Certificate of Completion from a Level 1 or higher training.
- PAs must have a U.S. SSN or Canadian SIN and a valid U.S. or Canadian mailing address, as payments are issued by check

Considerations before Applying:

1. Before applying to a training, it is very important that you check all training dates including Bridge days and make sure your schedule is clear.
 - a. This will include staff meeting time, which may happen at the beginning or the end of the training day and will often include a large portion of the lunch break.
 - b. Program Assistants may apply to more than one training at a time as long as there are NO conflicting dates.
 - c. Please only apply to the number of trainings to which you can commit.
2. When a staffing slot is offered to you, it is necessary that you inform the Trainer(s) of any known conflicts. This may result in the Training Team choosing a different applicant to help maintain continuity.
3. Once you accept a staff position the Program Assistant is required to make sure they can be fully present throughout the training.
4. Online Trainings – Program Assistants are required to participate and be engaged in the training.
 - a. Be in a safe, private space for participants to fully engage.
 - b. Be on camera, except for the need for self-care.

**ALL ATTENDANCE GUIDELINES ARE
APPLICABLE TO IN-PERSON AND
ONLINE TRAININGS.**



PA ATTENDANCE

Attendance Guidance:

Training staff is selected several months before training starts. Unexpected life changes may occur after the applicant has been selected, which may cause the applicant to withdraw from the entire training. Potential life changes could include the following:

- Marriage/Divorce
- Having a baby or adopting
- Death in the family
- Unexpected illness
- Moving to another residence
- Unexpected change in income or family dynamic



We expect PAs to be present for the full length of the training. In case of an emergency or approved absences, which have been disclosed prior to accepting the position, PAs may qualify for 50% stipend if present at least $\frac{1}{2}$ of the day. To receive 50% stipend, the LT must approve the absence, and the AT must clearly document the reason for the absence on the PA Staff Attendance sheet.

- Full length of the training means the entire length of the daily training including any staff meetings.
- A training day for three 4-day modules is a 9-hour day, 2-Bridge days between the modules for 5.5 hours each plus approximately an hour at the beginning or end of day for staff meetings.



PA ATTENDANCE

PAs will need to notify the Training Team as soon as you are aware you will not be able to attend the entire training so the best work around can be found. The Assistant Trainer will make a note next to the hours you are absent to let the administrative staff know the reason you are absent. Some typical examples for a missed training session are:

- A child who is unexpectedly sick and needs to be picked up,
- A necessary medical visit for you or someone you are responsible for
- A graduation, wedding or funeral that will require you to miss part of a day.

IFS Institute guidelines regarding PA stipends

- PAs will receive a daily stipend of \$155/day.
- PAs hours are documented through the staff sign in sign out sheet that is tracked by the AT.
- You will need to let the AT know when you leave and return so your hours are tracked accurately.
- If you miss a full training day, you will not be paid for that day.

Attendance Verification for PAs

- PAs who need attendance verification for any reason should sign up for CE credit at the start of the training and use the CE certificates sent by the CE provider (after each training session) for attendance verification. Everyone who does this will need to complete all the necessary paperwork for CE.



STIPEND & REIMBURSEMENT

- **The Program Assistant is a volunteer position with a stipend to help offset expenses.**
- **Program tuition is waived.**
- Daily stipend is paid for each full day a PA is present.
- **PAs must submit a completed IRS Form W-9 to IFSI.** If PAs need a blank W-9 form, they can download the form from the IRS website. Please do not contact the IFSI office to get W 9 forms.
- A full day is defined as any scheduled training day as outlined in the training brochure. (Check on retreat style training schedule)
- Stipends are not paid for officially scheduled days with 2 or fewer training hours, officially scheduled days that are partially attended, or for officially scheduled days a PA is completely absent. (Please reference Program Assistant Attendance Guidelines.)
- **All PAs are paid the same daily stipend amount of \$155 per day (this includes Bridge days).**
- **PAs will receive a link to complete a stipend form at the start of each training and only need to complete this form once.**
- IFSI will pay stipends at the end of each session once attendance is verified. Bridge day stipends will be paid with the following session payment, e.g., Bridge Day 1 is paid with Session 2 stipend.
- Stipends will not be paid unless the IFSI office receives stipend request forms and W-9 forms as noted above.

IRS W-9 Form <https://www.irs.gov/pub/irs-pdf/fw9.pdf>

**PA applicants must have either a U.S. Social Security Number or a Canadian Social Insurance Number.*



PA

DEFINITIONS: FIRST TIME PAs & EXPERIENCED PAs

- **First-Time PA** - someone who has never been a PA before in a Level 1 or Level 2 IFS training, or who is currently in the process of completing their first training as a PA.
- **Experienced PA** - someone who has served as a PA (see "Definition of Served as a PA") in an IFS Level 1 or Level 2 training that has been completed.

Definition of "Served as a PA"

- At least once for an entire six, 3-day session Level 1 that has already ended, or
- At least once for an entire Level 1 with three main sessions that have already ended, or
- At least once for an entire Level 2 Intensive that has already ended, or
- At least once for an entire 4-session, Multi-topic Level 2 that has already ended, or
- In two sessions of a "retreat-style" Level 1 or Multi-topic Level 2 that has two main/onsite sessions, as explained below.



- By serving as a PA in one completed main/onsite session, plus the teleconferences (if scheduled), of a “retreat-style” Level 1 or “retreat-style” Multi-topic Level 2 training with two main/onsite sessions, a first-time PA earns half a credit towards becoming an experienced PA.
 - To be considered an experienced PA based on service in a “retreat-style” Level 1 or “retreat-style” Multi-topic Level 2 training with two main/onsite sessions, a PA must complete service in two entire, “retreat-style” main/onsite sessions, plus the teleconferences (if scheduled). The two main/onsite sessions must be in trainings of the same Level, but may be in different “retreat-style” trainings and, if necessary, may cover the same content.
- A PA’s status (first-time vs. experienced) at the start of a training is their status throughout that training. For example, if someone becomes a PA in a new training before their first training is completed, they are still considered a first-time PA for the new training in its entirety.



First

Experience



PA APPLICATION PROCESS

- If IFSI organizes overnighter/commuter arrangements for an onsite training, an IFSI administrator will post the PA application on IFSI's website, and the PA application deadline will be approximately 3 months before the training starts.
 - The timeline may be shortened for trainings posted closer to the training's start date.
- If IFSI does not organize overnighter/commuter arrangements for an onsite training, an IFSI administrator will post the PA application on IFSI's website and the PA application deadline will be approximately 2 months before the training starts.
 - The timeline may be shortened for trainings posted closer to the training's start date.
- Anyone wishing to be a PA must submit a completed PA application to IFSI. **The following submissions do not qualify as a completed, acceptable PA application:**
 - Verbal applications
 - Applications related to other trainings
 - Applications written on other training session forms
- Applications submitted only to a trainer will not be considered as a completed application.
- PA applicant prerequisites are listed on the website at <https://ifs-institute.com/trainings/program-assistants>
- PA applicants may not apply to be a PA and a participant in the same training.



PA SELECTION BY TRAINERS

- ATs coordinate PA selection with their LTs.
- PAs are selected by LTs and ATs based on enrollment and the following policy guidelines.
 - Trainers may give preference to PA applicants who are Certified IFS Therapists or Certified IFS Practitioners, and to PA applicants who are Level 2 or higher graduates.
 - Each training will have a minimum of 12 PAs. (There are some exceptions for other training formats that are not commonly utilized.)
 - For onsite trainings the appropriate number of PAs may be impacted by the size of the site and the number of breakout spaces.
 - For onsite trainings, trainers are encouraged to select at least one qualified PA who lives in the same area as the training site. If no qualified local PAs apply for a training, trainers may need to contact trainers who have led previous trainings in the area and invite local training graduates to apply.
- Trainers may not substitute a PA for another PA who is temporarily absent without written permission from IFS Talent Management.
- Two or more PAs may not share a single PA position.

All trainers must adhere to the requirements regarding PAs set forth in IFSI's Dual/Multiple Relationship Policy.



Trainer Notification to PAs

- Trainers notify PAs about whether they have been selected or not. Trainers notify PAs about their responsibilities, payment details, and other topics in this policy.

CERTIFICATE OF COMPLETION

- PAs are **not** eligible to receive Certificates of Completion for trainings in which they are PAs and are not eligible to participate in Level 2 or 3 trainings based on PA service.



CODE OF CONDUCT

Code of Conduct for Events and Activities Organized by IFS Institute, Inc. ("IFSI")

Anyone who participates in, observes, teaches, assists, or otherwise is present at an IFSI-organized training program, conference, webinar, teleconference, workshop, on-line community, or other learning event. IFSI organized events and activities include those organized by our International Partners.

IFS Institute requires that Members of its events and activities create and maintain an appropriate and harassment-free learning environment for themselves and others. While all parts are welcome, all behavior is not.

Behaviors that are not aligned with our Code of Conduct include:

- Aggressive or hostile verbal comments and/or behavior
- Displaying or allowing to be displayed sexual images in public spaces
- Intimidation or stalking
- Unwanted, uninvited or not approved photography or recording
- Sustained or frequent disruption of training program exercises and activities
- Inappropriate physical contact
- Unwelcome sexual attention
- Overt disregard for the impact of one's words or actions on historically marginalized group members

- Inability to work effectively in a group setting, including a lack of willingness to work toward repair with other participants, even with the support of training program staff
- Inability to unblend from aggressive, hostile, controlling, or otherwise significantly disruptive parts, even with facilitation
- Using training communication channels (e.g., WhatsApp, Zoom Chat) or time during training events for purposes not aligned with the learning objectives of program
- Engaging in any behavior contrary to the Safety and Confidentiality provisions set forth below
- Advocating for or encouraging any of the above behavior

Safety and Confidentiality

IFS Institute's training programs and other learning events are not psychotherapy sessions. All components of the training or other learning event, including those components that are experiential in nature, are for the purpose of teaching the IFS model. Therefore, the interactions and information shared by Members are not privileged communications as they might be during actual therapy sessions.

And, in order to create and maintain an appropriate learning environment, all personal information that Members of the training program or other learning event disclose should be treated as confidential and should not be shared, by no means whatsoever, including social media, with persons who are not Members of the training program or other learning event, including family members, friends, social media groups, colleagues, participants, and Members of other training programs or learning events.

In addition, all Members must respect the confidentiality of the people with whom a Member is practicing and in the relevant small groups (e.g., Mentor Group, Reflection Group) and not discuss other's work or experiences outside of these small groups (which includes not speaking about another's work in this training program or other learning event's large group), unless the concerned Member has provided their permission.

Confidential information may need to be disclosed if holding the information would (1) compromise anyone's safety, health, or well-being, or (2) violate your ethical or legal responsibilities. Professional and licensing organizations, as well as states, provinces, and other governmental jurisdictions, may have specific and different policies regarding confidentiality for counselors, therapists, and other professionals. Training program Members are responsible for knowing their particular and applicable governing policies, and for adhering to their professional standards for confidentiality.

Participants and staff may not make audio or visual recordings of any part of any IFS training or learning event. Only IFS Institute or the official organizers of international IFS trainings or anyone authorized by them, may record pieces of a training or learning event.

IFSI reserves the right to pursue appropriate legal remedies and/or remove from and/or restrict access to IFS Institute trainings, learning events or social media platforms for any failure to abide by this Code of Conduct.

If you have a concern regarding the conduct of a member of the training, please contact the Trainers or relevant IFSI learning event staff who may contact the IFS Institute leadership as needed.

Online Community Purpose: Our online community platforms, including but not limited to Facebook Groups, provide forums for shared experiences using the IFS model. In addition to the Code of Conduct, we have the following participation guidelines:

Promotional posts: We will provide prompts to allow you to comment with any offers, products, or services you have available to the community.

Clinical consultation: No one may post information that could potentially breach client confidentiality.

Medical disclaimer: Online communities are not substitutes for clinical diagnosis or treatment, nor is the information provided intended to replace consultation with a qualified health-care provider. If you're in crisis, please contact your local emergency services.

Medical disclaimer (continued):

Please note the opinions and content on community group pages do not represent IFS Institute, nor do they necessarily represent the IFS model. If you have any questions about online community issues, please contact Sara Oberg at sara@ifs-institute.com.

Additional Terms and Conditions

Training Program Brochure: It is each Program Assistant's responsibility to read and understand the contents of the brochure for this training program that is on the Internal Family Systems Institute ("IFSI") website.

IFSI-Initiated Withdrawal: IFSI, in its sole discretion, may withdraw a Program Assistant from an IFSI training program at any time for a violation of the training program's Terms and Conditions or other policies on this application, including one or more violations of the Code of Conduct. In addition, IFSI may withdraw a Program Assistant out of concern for the Program Assistant's safety and well-being. If this happens, no refund of a Program Assistant's travel or other expenses will be made and no stipend or other fee will be paid for days not worked.

Health and Safety Protocols for Onsite Sessions: IFS Institute will be following the guidance of the training program venue and/or relevant government agencies with respect to health and safety protocols for any portions of this training program held onsite. As such, all people attending the training program must observe health and safety protocols at the training program site (for example, wearing a mask, practicing social distancing, being vaccinated, getting tested, etc.) if required by the training program venue and/or relevant government agencies. As has been the case previously, required protocols can change, and can be imposed or lifted at any time before the training program starts, and while the training program is in session.

Medical Disclaimer and Personal Responsibility: The nature of IFS training program material and the learning process may stimulate psychological and emotional issues for people at the training program. Program Assistants are required to take responsibility for maintaining their own safety in IFSI training programs. In the event that a problematic therapeutic issue surfaces in the process of the training program, please let a training program staff member know as soon as possible. Depending on the issue, it may be helpful to discuss the issue with a personal therapist. If you are not currently in therapy and would like a referral, a staff member may be able to make a confidential referral.

IFS training programs are not substitutes for mental health care services, clinical diagnosis, or treatment, nor are the information or activities that IFS training programs provide intended to replace consultation with a qualified healthcare provider. Training program staff working remotely may not be able to help you, and cannot be expected to provide assistance should you experience a mental health or other emergency. If you are in crisis now or anytime, including during an IFS training program, please contact your local emergency services (for example, 911), or go to the nearest emergency room.

Schedule and Expenses: IFSI reserves the right to postpone, cancel, or otherwise change any training program schedule prior to its beginning.

At no time is IFSI responsible for Program Assistants' travel, lodging, or incidental expenses. IFSI reserves the right to substitute training program staff whenever necessary without obligation to Program Assistants in the training program.

Photography and Recording: PAs may not make audio or visual recordings of any part of any IFS training program session. IFS Institute or its agents may make audio and visual recordings of the training program's sessions (excluding scheduled practice "breakout" groups and "reflection" groups) in order to facilitate the IFS trainer evaluation process. The sharing and other distribution of these recordings is prohibited, except among select IFS Institute trainers and employees, as designated by IFS Institute.

Training roster: Each training member's contact and basic identifying information appears on the training roster that's shared with those involved with the training to facilitate necessary communications and for IFS Institute's organizational needs. Training members agree to email Training@IFS-Institute.com if any of their contact or basic identifying information should not appear on the roster. Please note that at least one's first and last name, email address, and phone number are required.



PA REMOVAL PROCESS

Purpose: This process is to define the steps required to classify a Program Assistant (PA) as suspended from performing the duties of the role until they can do the inner work necessary to be Self-led and function within the guidelines of IFS.

Of course, our hope is these will be rare circumstances. As always, the first course of action should be for the Lead Trainer, Co-Leads, and Assistant Trainer to work together to try to re-direct the behavior and resolve the issue with minimal disruption to the training participants.

We expect Members of each event or activity organized by IFS Institute to abide by the Code of Conduct, which can be found below. IFS Institute reserves the right to pursue appropriate legal remedies or remove participants from IFS Institute events for any failure to abide by this Code of Conduct.

Confidentiality & Privacy: The names and all information discussed during the review process are to be kept confidential for the safety and integrity of those involved.



PA REMOVAL PROCESS

If the behavior is so egregious that the PA must be removed from a Training, but could PA in the near future follow the steps below:

1. North American Trainings - Make sure the Lead Trainer, Co-Leads, and Assistant Trainers agree as a Trainer Team with the decision.
2. International Trainings - Make sure the International Partners and the Trainer Team are in agreement.
3. Once a Trainer Team makes the decision to remove a PA, they contact the designated IFSI Staff as follows:
 - a. North America/First – Eliza Dudek, North American Lead Talent Specialist
 - b. North America/Second – Desiree Goscilo, Program Assistant Specialist
 - c. International Trainings – Luis Vega, International Director (Applicable for IFSI organized trainings)
4. If the Trainers are comfortable informing the PA, they should handle the conversation regarding discontinuation of the PA role for that specific training. If support is required, a designated IFSI staff member can participate in the conversation with the Trainers.
5. If the Trainer Teams listed in #1 or #2 cannot reach an agreement, North American teams should contact Shawn Casselberry, and international Trainer Teams and/or IPs should contact Luis Vega. At that point IFSI Leadership will make a final determination.

PA REMOVAL PROCESS

IFSI will meet separately with both the PA and Trainer Team to investigate both sides, if necessary. After which, the IFSI designated staff member will follow up with a formal email in regard to being removed, and work with the Trainers and IPs, if applicable, involved to develop next steps for that PA.

When at all possible, if a PA needs to be removed, unless it is necessary for immediate removal, it is preferable to wait until the end of a session and have them not return to minimize the disruption.

Removal and Unable to PA in the Future

1. If the behavior is so egregious that a determination is that the PA should not PA again or for a period of time, the IFSI designated staff member will formally inform the PA and place the PA on a removal list, which will be monitored by the IFSI Talent Management Team.
 2. PAs placed on the removal list will be given a 2 yr. period, unless determined otherwise by recommendation from Trainers and IFSI Leadership to work on their parts and be re-evaluated before allowed to resume the role of a PA
- 

PA REMOVAL PROCESS

Accessing the Classification

- The PA removal list will be a combined effort between IFSI Talent Management Team and the International Partners.
- For North American trainings the IFSI Talent Management team will be the gatekeeper for this list.

Program Assistant Reinstatement:

- If a PA is removed and on a probation period, an IFSI designated staff member will inform the PA of their reinstatement date.
- It is the responsibility of the individual to reach out to IFSI when their reinstatement date has passed to be considered for reevaluation.
- IFSI will evaluate how the PA has grown since being removed and make a determination on if they can return to a PA role.

POLICY FOR PHOTOGRAPHY AND AUDIO-VISUAL RECORDING AT IFSI-ORGANIZED IFS TRAINING PROGRAMS

Program Assistants may not make audio or visual recordings or take photographs of any part of any IFS training session, except as described in IFSI's Policy for Photography and Audio-Visual Recording at IFSI-Organized IFS Training Programs.

Program Assistants may not use Skype, Zoom, FaceTime, or any other digital or electronic means of transmitting or receiving all or part of a training session.

For Online trainings, only IFSI's chosen meeting platform may be used to access the training.

All PAs agree to be recorded as per IFSI's Policy for Photography and Audio-Visual Recording at IFSI-Organized IFS Training Programs.





THANK YOU



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