## 

## PROCESS FOR INITIAL CERTIFICATION OF CERTIFIED SCRUM TRAINER® PROFESSIONALS

**Introduction**

Certified Scrum Trainer® professionals (“CSTs”) play a vital role within the Scrum Alliance. CSTs are licensed to teach Certified ScrumMaster® and Certified Scrum Product Owner® courses. Stringent certification requirements are imposed on prospective CSTs to ensure that only those who are qualified to meet this commitment are entrusted to engage in this role on behalf of the Scrum Alliance.

This document (the “CST Certification Process”) sets out the process by which an individual (the "Applicant" or “Candidate” depending on the first two parts of the process) wishing to be considered for certification as a CST demonstrates that he/she meets all of the Certification Standards for Certified Scrum Trainer® Professionals (the “Certification Standards”).

This Process for Certification of Certified Scrum Trainer® Professionals is divided into three parts:

* Part I – Prescreening & Initial TAC Review Panel
* Part II – Interview and Certification Panel
* Part III – Certification Review Committee

**Prerequisite & Application**:

In order to begin the CST Certification Process, an Applicant must hold a current, active Certified Scrum Professional® (“CSP”) certification. See the CSP page on our website for more details:

<http://www.scrumalliance.org/pages/certified_scrum_professional>

* The Applicant should read the CST page on the Scrum Alliance website to ensure an understanding of the current application, review and certification processes: <https://www.scrumalliance.org/certifications/trainers/cst-certification>
* The Applicant should review the current application requirements via the CST application page on the Scrum Alliance website: <https://www.scrumalliance.org/certifications/trainers/cst-certification/cst-application>.
* The submitted application and supporting documentation should demonstrate that the Applicant meets each of the Certification Standards (outlined in the Appendix of this document) and that the Applicant is well-qualified to be certified by Scrum Alliance as a CST.

## PART I – PRESCREENING & INITIAL TAC REVIEW PANEL

1. **Part I / Step 1: Prescreen Review of Application and Supporting Documentation by Scrum Alliance Staff**
   1. Once the application and supporting documentation is submitted to Scrum Alliance and the application fee has been paid, the application will be prescreened by Scrum Alliance staff to ensure that all materials have been submitted and the application meets the outlined requirements.
   2. If (i) the Applicant is currently certified as a CSP, (ii) the Application is complete, (iii) required additional documentation has been submitted, and (iv) the appropriate Application fee has been paid, then the Scrum Alliance Staff shall refer the Application to the Trainer Approval Community as described in Step 2 below.
   3. If the Applicant is not currently certified as a CSP, if the Application is not complete, if any required additional documentation has not been submitted, or if the Application fee has not been paid, the Application shall be rejected as incomplete and a communication shall be sent to the Applicant explaining the reason(s). There is no appeal from such a rejection and there is no waiting period for reapplication. If resubmitted within one year’s time (from the date of the rejection communication), there will be no additional application fee.
2. **Part I / Step 2: Prescreen and Initial TAC Review Panel by the Trainer Approval Community**
3. The Trainer Approval Community (the “TAC”) is a body that consists of active, certified CSTs who serve for such terms as are provided by the Education Director.
4. After completing the review of the Application described above in Step 1, if the Applicant is currently certified as a CSP, if the Application is complete, any required additional documentation has been submitted, and the Application fee has been paid, the Scrum Alliance Staff shall distribute the Application and all supporting documentation to a TAC CST for an additional prescreen. The CST Prescreen is used to validate that the application is ready to move forward to formal review.
   * 1. If the application is not deemed as acceptable to move forward to formal review, the Application shall be rejected and a communication shall be sent to the Applicant explaining the reason(s). There is no appeal from such a rejection. There is no waiting period for reapplication, but the Applicant will be required to submit the $250 application fee at the time of resubmission.
5. After completing the CST prescreen of the Application and validating that the application should move forward to formal review, the Scrum Alliance Staff shall distribute the Application and all supporting documentation to two members of the TAC for purposes of reviewing the specific Application (the “Initial TAC Review Panel”).
6. The members of the Initial TAC Review Panel shall review the Application and the supporting documentation to determine whether the Applicant meets each of the Certification Standards.
7. The Application and supporting documentation shall be reviewed against expectations for the Certified ScrumMaster course in order to determine whether the Applicant is qualified to teach the course. Scrum Alliance is working to align the CSM Learning Objectives with the Scrum Guide and therefore, the submitted course materials must align with the Scrum Guide.
8. Each member of the Initial TAC Review Panel shall inform the appropriate individual on the Scrum Alliance Staff, via electronic communication, within thirty days after receipt of the Application and supporting documentation (i) that the member has completed his/her review of the Application and supporting documentation; and (ii) whether, in the judgment of the member, from the written material submitted, the Applicant appears to meet each of the Certification Standards.
9. An Initial TAC Review Panel member shall recuse himself or herself and shall not participate in the consideration of an Application if (i) submitted by an Applicant who is an employee of, or independent contractor to, a company (or an affiliate of a company) by which the Initial TAC Review Panel member is employed or to which the member serves as an independent contractor; or (ii) in circumstances where to participate in consideration of the Application would violate the [Scrum Alliance Code of Ethics](https://www.scrumalliance.org/code-of-ethics). An Initial TAC Review Panel member shall inform Scrum Alliance if the member is required to recuse himself or herself with respect to a particular Application. Scrum Alliance shall appoint another TAC member (or, if an eligible TAC member is not available, another CST) to serve on the Initial TAC Review Panel with respect to that particular Application.
10. **Part I / Step 3: Initial TAC Review Panel Decision**
11. If two members of the Initial TAC Review Panel inform the Scrum Alliance Staff that, based on their review of the written material submitted, in their judgment, the Applicant appears to meet each of the Certification Standards, Scrum Alliance shall invite the Applicant to attend a certification event, as described and defined in Part II.
12. If the votes of two members of the TAC are split, the Scrum Alliance staff shall distribute the Application and all supporting documentation to a third member of the TAC, for the purpose of reviewing the specific Application and breaking the tie with his/her vote.
13. If two members of the Initial TAC Review Panel inform the Scrum Alliance Staff that, based on their review of the written material submitted, in their judgment, the Applicant does not appear to meet each of the Certification Standards, the Application shall be rejected and a communication shall be sent to the Applicant (i) explaining that, in the judgment of the Initial TAC Review Panel, the Applicant does not meet the Certification Standards; and (ii) generally describing the reason(s) that the Initial TAC Review Panel held that the Application does not meet all of the Certification Standards. The decision of the Initial TAC Review Panel may be appealed as provided in Part III. There is a six-month waiting period for reapplication.

## PART II – INTERVIEW AND CERTIFICATION PANEL

## Part II / Step 1: Interview of Candidate At Certification Event

1. Scrum Alliance shall hold certification events (“Certification Events”) at Global Scrum Gatherings, and also at those Regional Scrum Gatherings and Scrum-Alliance sponsored events where at least five TAC members will be in attendance.
2. When an Applicant is invited to interview, they have passed the Initial TAC Review Panel and are considered a CST candidate (“Candidate”).

When a Candidate is to be invited to a Certification Event, Scrum Alliance shall send the Candidate the dates of the forthcoming Certification Events. The Candidate shall notify Scrum Alliance of the Candidate’s attendance at a Certification Event in compliance with such deadlines as shall be set by Scrum Alliance.

1. Due to significantly better performance by Candidates at face-to-face interviews, virtual interviews are strongly discouraged and will only be considered for hardship cases.
2. At each Certification Event, Scrum Alliance shall designate at least five TAC Members, who will be present at the Event, to act as the Interview and Certification Panel (“Interview and Certification Panel”). Scrum Alliance (in conjunction with the members of the Interview and Certification Panel) shall schedule a time during which the Candidate shall appear before, and be interviewed in person, by the Interview and Certification Panel.
3. An Interview and Certification Panel member shall recuse himself or herself and shall not participate in the consideration of a Candidate if (i) the Candidate is an employee of, or independent contractor to, a company (or an affiliate of a company) by which the Interview and Certification Panel member is employed or to which the member serves as an independent contractor; or (ii) in circumstances where to participate in consideration of the Candidate would violate the [Scrum Alliance Code of Ethics](https://www.scrumalliance.org/code-of-ethics). An Interview and Certification Panel member shall inform Scrum Alliance if the member is required to recuse himself or herself with respect to a particular Candidate. Scrum Alliance shall appoint another TAC member (or, if an eligible TAC member is not available, another CST) to serve on the Interview and Certification Panel with respect to that particular Candidate.
4. The Interview and Certification Panel shall conduct an interview of the Candidate and make a determination as to whether the Candidate meets each of the Certification Standards and is a well-qualified trainer and instructor.
5. The TAC shall prepare a list of interview questions and training scenarios/simulations that will be used by the Interview and Certification Panel in conducting interviews with Candidates. The members of the Interview and Certification Panel may also ask other questions relating to whether the Candidate meets each of the Certification Standards and is well-qualified to be certified as a CST.

## Part II / Step 2: Certification Decision

1. At an appropriate time after the Interview and Certification Panel’s interview of a Candidate, the panel shall meet to decide whether, based on the results of the Candidate’s interview, the Candidate meets all of the Certification Standards and is well-qualified to be certified by the Scrum Alliance as a Provisional CST, or a full CST, based on a majority vote of the review team.
2. In order to be considered for full CST status, a Provisional CST will be required to sign the CST Agreement, teach three Public CSM courses within six months and meet requirements around student feedback and CSM test results.
3. If all of the members of the Interview and Certification Panel agree that the Candidate meets all of the Certification Standards and is well-qualified to be certified by the Scrum Alliance as a CST, the Candidate shall be approved to be certified as a CST. Scrum Alliance shall notify the Candidate that his or her Application has been approved. The Candidate shall sign and submit to the Scrum Alliance the current form of the Scrum Alliance’s CST Agreement (the “CST Agreement”) and pay the applicable annual fee (or portion of the annual fee as permitted by Scrum Alliance). Immediately after the signed CST Agreement is returned to the Scrum Alliance and the applicable fee is paid, the Candidate shall be certified by the Scrum Alliance as a CST.
4. Pending full CST approval, the CST annual fee will be pro-rated for Provisional CSTs to the date the CST Agreement was signed and received.
5. Unless terminated sooner pursuant to the terms of the CST Agreement, certification will continue for the duration of the calendar year of which the CST Agreement was signed and must be renewed annually in the manner provided by Scrum Alliance.
6. If the members of the Interview and Certification Panel determine that the Candidate does not meet all of the Certification Standards and/or is not well-qualified to be certified by Scrum Alliance as a CST, the Candidate shall be rejected and the Candidate shall not be certified as a CST. The decision of the Interview and Certification Panel may be appealed as provided in Part III. A Candidate who is rejected by the Interview and Certification Panel will be eligible to interview again after six months (from the date of the interview) have passed.

## PART III – CERTIFICATION REVIEW COMMITTEE FOR APPEALS

1. **Decisions That May Be Appealed**
   1. A decision by an Initial TAC Review Panel that the Applicant does not meet one or more Certification Standards, as described in Part I, Step 3, C.; and
   2. A decision by an Interview and Certification Panel that the Candidate does not meet all of the Certification Standards and/or is not well qualified to be certified by the Scrum Alliance as a CST, as described in Part II, Step 2, C.

## Manner of Appeal

* 1. An Applicant from Part I or a Candidate from Part II of the certification process (“Individual”) may appeal a denial decision by informing the Education Director of the appeal within thirty days after notice of the decision is sent to the Applicant/Candidate.

## Establishment of Certification Review Committee

* 1. Upon receipt of an appeal, the Education Director shall designate three TAC Members to serve as a Certification Review Committee with respect to that appeal.
  2. No TAC Member who participated in the consideration of an Application, either as a member of the Initial TAC Review Panel or as a member of the Interview and Certification Panel, shall serve on the Certification Review Committee with respect to that Application.
  3. In addition, a TAC Member appointed to serve on a Certification Review Committee shall recuse himself or herself and shall not participate in the consideration of an appeal (i) submitted by an Applicant who is an employee of, or independent contractor to, a company (or an affiliate of a company) by which the Certification Review Committee member is employed or to which the member serves as an independent contractor; or (ii) in circumstances where to participate in consideration of the appeal would violate the [Scrum Alliance Code of Ethics](https://www.scrumalliance.org/code-of-ethics). A Certification Review Committee member shall inform Scrum Alliance if the member is required to recuse himself or herself with respect to a particular appeal. Scrum Alliance shall appoint another TAC Member (or, if an eligible TAC Member is not available, another CST) to serve on the Certification Review Committee with respect to that particular appeal.

## Appeal Procedures

* 1. The Certification Review Committee may meet virtually via conference call as long as all individuals involved can clearly communicate and hear each other. However, the Certification Review Committee, with the concurrence of the Education Director, may hold an in-person meeting to consider the appeal.
  2. The Individual appealing a decision: (i) may be represented by counsel in the Certification Review Committee process; and (ii) shall be permitted to submit a statement to, and make an oral presentation in person or through counsel, to the Certification Review Committee.
  3. The Certification Review Committee shall consider the appeal solely based on: (i) the Application and supporting documentation considered by the Initial TAC Review Panel and any additional documentation or written statement(s) presented to the Interview and Certification Panel; (ii) any written comments about the Application submitted either by the members of the Initial TAC Review Panel and/or the Interview and Certification Panel; and (iii) any statement and/or oral presentation made by the Individual to the Certification Review Committee.
  4. The Individual making the appeal shall have the burden of proof and the Certification Review Committee shall uphold the decision from which the appeal is taken unless the Individual clearly demonstrates that the decision being appealed is in error and that the Individual meets all of the Certification Standards and is well qualified to be certified by Scrum Alliance as a CST.

## Appeal Decision

* 1. If at least two of the members of the Certification Review Committee find that the decision being appealed is clearly in error and that the Individual clearly meets all of the Certification Standards and is well qualified to be certified by Scrum Alliance as a CST, the Individual shall either be (i) invited to interview at a Certification Event (if appealing as a denied Applicant from Part I of the process) or (ii) approved to be certified as a CST (if appealing as a denied Candidate from Part II of the process).

1. If invited to interview, the Individual shall be referred to the Interview and Certification Panel (see Part II).
2. If approved to be certified as a CST, the Education Director shall notify the Individual that his or her Application has been approved. The Individual shall sign and submit to the Scrum Alliance the current form of the CST Agreement and pay the applicable annual fee (or portion of the annual fee as permitted by the Scrum Alliance). Immediately after the signed CST Agreement is returned to the Scrum Alliance and the applicable fee is paid, the Individual shall be certified by the Scrum Alliance as a CST.
   1. If at least two members of the Certification Review Committee find that the decision being appealed is not clearly in error, and that the Individual does not clearly meet all of the Certification Standards, and/or that the Individual is not well qualified to be certified by the Scrum Alliance as a CST, then the appeal shall be rejected. The decision of the Certification Review Committee is final and may not be appealed. An Individual whose appeal is rejected by the Certification Review Committee will be eligible to submit a new application to be certified as a CST twelve months from the date of appeal rejection.
   2. The Education Director may adopt additional rules of procedure, not inconsistent with the provisions of this Part III, which shall govern the activities of Certification Review Committees.

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## APPENDIX TO PROCESS FOR INITIAL CERTIFICATION OF CERTIFIED SCRUM TRAINER® PROFESSIONALS: CERTIFICATION STANDARDS

Certified Scrum Trainer® professionals (“CSTs”) play a vital role within the Scrum Alliance. CSTs are licensed to teach Certified ScrumMaster® and Certified Scrum Product Owner® courses. Stringent certification requirements are imposed on prospective CSTs to ensure that only those who are qualified to meet this commitment are entrusted to engage in this role on behalf of the Scrum Alliance.

# These Standards define the certification requirements that each CST must meet initially, and must maintain, in order to continue to be a CST. Each CST must meet all of these Certification Standards for Certified Scrum Trainer® Professionals. As an Applicant, the expectation is that you are currently practicing these Standards.

1. Standard 1. A CST Applicant must have a deep knowledge and extensive experience with the concepts, practices, and principles that are the foundation of Scrum.

***Essential Elements:***

* 1. A CST Applicant must have a solid understanding of the Scrum framework, the principles and values that are the foundations of Scrum and a knowledge of how and why Scrum works. This understanding may be enhanced by ideas from other disciplines or philosophies, but the trainer must always be clear what belongs to Scrum and what is an extension.
  2. A CST Applicant must provide sample training materials for the CSM course, for which they should be the sole creator. These materials should demonstrate the above-mentioned deep knowledge of Scrum.
  3. A CST Applicant must have extensive hands-on experience implementing Scrum inside organizations as a ScrumMaster, product owner, or team member. Related experience need not be limited to the field of software development.

1. Standard 2. A CST Applicant must be an experienced and competent trainer.

***Essential Elements:***

* 1. A CST Applicant must provide information demonstrating successful facilitation of at least 10 multi-day ScrumMaster training sessions with a minimum of 100 students in total.
  2. A CST Applicant should exhibit the ability to hold the attention of a group, provide quality training for two full consecutive days and demonstrate through both student feedback and co-trainer/auditor endorsement that this has been achieved.
  3. A CST Applicant is a capable storyteller, having a wealth of Scrum experience to share in an engaging way with participants so as to provide inspiration and learning.
  4. A CST Applicant is an expert facilitator, who creates a great environment for learning for different types of learners and helps the participants integrate learning through different methods. For example, story telling, use of powerful metaphors, drawing, lecture, group work, self-reflection, simulations and discussion.
  5. A CST Applicant is an expert trainer who looks after the learning objectives, while still having a real interaction with students (instead of following a predefined script).
  6. A CST Applicant is an effective communicator, who uses succinct, appropriate and respectful language.

1. Standard 3. A CST Applicant must teach Scrum and may have experience as a trainer in other areas.

***Essential Elements:***

* 1. Before becoming a CST and, thus, becoming certified to teach CSM courses, the trainer must have taught Scrum in a non-certified context on multiple occasions, and preferably have partnered with a currently certified CST to co-deliver CSM training.
  2. When a CST Applicant teaches a CSM course, it should be Scrum that is taught; not a hybrid methodology or process created by the trainer.
  3. Training experience in other areas, and with other skilled trainers, is also valued.

1. Standard 4. A CST Applicant must continually update his or her skills.

***Essential Elements:***

* 1. A CST Applicant must demonstrate commitment to continuous learning and the continuous improvement of their training skills and materials.
  2. Attending trainer/coach retreats, partnering with other CSTs to train, active involvement on the discussion groups and the study of ideas and techniques beyond the Scrum and Agile arenas are some ways to achieve this.

1. Standard 5. A CST Applicant must be actively involved in the Scrum community.

***Essential Elements:***

* 1. Scrum is a growing community of writers, thinkers, trainers, coaches and practitioners. It is essential that a trainer be actively involved in this community, e.g. through speaking engagements, attendance at events, user group involvement, blogging, discussion-list participation, local event organization or the building of Scrum communities inside large corporations/organizations.
  2. A CST Applicant should become known to other trainers and should engage in active dialog within the Scrum community, and the world at large, to socialize Scrum more widely, to further the cause of Scrum Alliance, and to help with Transforming the World of Work®.