



CPT CANDIDATE HANDBOOK

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CPT Introduction

Purpose The purpose of the CPT Candidate Handbook is to provide information to prospective candidates of the Performance Technologist (CPT) program.

The document consists of definitions, descriptions, and procedures. It is cross-referenced to help users locate information that is addressed in more than one section.

Each section stands alone.

Overview The CPT Candidate Handbook consists of 2 sections:

1. CPT Overview
2. Application Process

1. CPT Overview

Philosophy Statement

The Certified Performance Technologist (CPT) designation recognizes professionals who have demonstrated the ability to use a systematic process to add value and produce measurable results while collaborating with stakeholders and working within the constraints of an organization.

The CPT designation is the industry's premiere certification and is far more rigorous than most professional credentials. It is highly prized by employers because it is based on repeatable, proven work.

Why Certification?

For years, employers and clients had been asking for standards and criteria to help them distinguish practitioners who have proven they can produce results through a systematic process.

Until the development of the CPT designation, anyone could claim that they were a professional in performance improvement and training.

At the same time, practitioners had been asking for a credential that would help them assess their ability, better focus their professional development efforts, and recognize their capabilities.

In response to this need, in 2002 the International Society for Performance Improvement (ISPI) launched the CPT designation, the first and only performance improvement credential in existence.

Today, more than 1300 practitioners from Africa, Australia, Europe, North America, and South America have met the rigorous requirements and become Certified Performance Technologists.

What is Certification?

Certification is a credential or designation for professionals who have demonstrated worthy performance achieved through a systematic process.

The ISPI CPT certification is distinctive in that it is both performance and competency based. It is about delivering service that clients value and doing it in a way that can be measured and replicated.

1. CPT Overview, continued

Requirements

To become certified, you must:

- Have three years of experience in performance improvement efforts
- Demonstrate proficiency in 10 Standards three different times using a minimum of three and a maximum of seven projects or assignments
- Commit to a Code Of Ethics
- Commit to Recertification every 3 years

ISPI Membership is *not* required. Completion of ISPI's Institutes is *not* required. Completion of a formal training or education program is *not* required.

About the Standards

Four of the Standards are based on ISPI's Principles:

1. Focus on Results
2. Take a Systemic View
3. Add Value
4. Partner

The remaining six Standards describe a systematic process:

5. Determine Need or Opportunity
6. Determine Cause
7. Design Solutions including Implementation and Evaluation
8. Ensure Solutions' Conformity and Feasibility
9. Implement Solutions
10. Evaluate Results and Impact

You can download a complete copy of the CPT Performance Standards from www.ispi.org/cpt.

1. CPT Overview, continued

Who Developed the Standards?

A special Certification Taskforce was created to develop the credential's Standards. Members represented business, government, academia, and independent practitioners.

Under the direction of Jim Pershing, graduate students who conducted literature reviews to confirm that the Standards appear in practice, validated the Standards.

In addition, ISPI conducted pilot studies with companies to confirm the usefulness of the Standards and the workability of the process.

In 2012, a validation study was conducted and minor revisions were made to the Standards.

How is the Credentialing Process Managed?

The program is managed under the direction of the Director of Certification for ISPI.

The Director of Certification is hired by the ISPI Executive Director and confirmed by the ISPI Board of Directors who are elected by the Society's membership.

How Much Does It Cost?

There are four pricing structures:

1. ISPI international members
2. People whose employers pre-paid for multiple applications
3. People who are not affiliated with ISPI or its chapters

Society & Affiliate Members	Pre-Paid	Non-members
\$995	\$4975 for 6 \$9,950 for 13	\$1,195

4. People who attend the ISPI two-day workshop that is an overview of the process. To learn more about this option, contact certification@ispi.org

1. CPT Overview, continued

How Is Proficiency Assessed?

Applicants' proficiency is assessed through a combination of:

- Attestations by clients or employers, and
- A review of documents by qualified Reviewers, and
- A further review by the CPT Governance Committee of Applications deemed certifiable by Reviewers

Who Are the Qualified Reviewers?

Reviewers are people who are deemed qualified through experience or education and are trained in how to conduct the assessments.

How Do I Prepare?

When you apply for the credential, you will get a self-assessment you can use to judge your readiness and direct your development.

What Happens After I Get Certified?

Once you achieve the certification, you will have a credential that distinguishes you in the marketplace.

You will be entitled to use the prestigious CPT logo (within guidelines) and you will receive a certificate suitable for framing.

What if I My Application is Rejected?

There are two circumstances under which you might not become certified:

- Your application is improperly completed or missing information
- Your application and supporting materials are reviewed and not accepted

Improper or Incomplete Application

If your application is incomplete, your application will not go through the review process. You will receive feedback explaining what is missing that you should provide. You will have 90 days to submit the missing information.

Non-Acceptance of Application

If you submit your complete application and all required materials and it is not accepted after going through the complete review process, you will receive developmental feedback. You will have 12 months to resubmit your application with attestations at no extra charge at which time it will go through another review process. If you choose to withdraw your application, you will be refunded all but \$250 for processing.

If you are denied the CPT credential after resubmitting your revised application, you have the right to appeal the decision within 90 days. Information about how to appeal would be sent to you at that time.

1. CPT Overview, continued

How Is the Effectiveness of the Program Measured?

ISPI measures:

- The number of employers asking for certified professionals
- The number of organizations funding staff's pursuit of the credential
- The number of people pursuing it
- The number of providers tailoring their training to the Standards
- Perceptions of Certificants that it helped their career
- Its service level to Candidates and Certificants
- The degree the program is self-funding and generates auxiliary income for the Society

Where Can I Learn More?

Visit www.ispi.org/cpt

2. Application Process

How to Apply for the CPT

To apply for the CPT designation:

1. Download and study the Standards, an Application that contains the Code of Ethics at www.ispi.org/cpt.
2. Complete the Self-Assessment to determine your readiness and/or identify areas you want to develop
3. Read through the entire packet. The application is in two parts. Part One (pages 1 – 13) contains forms you must read, sign, and submit. Part Two (starting on page 14) contains the forms that you will submit separately from Part One and that will be sent to two reviewers independently.
4. You will need to:
 - Identify at least three projects with a large enough scope to demonstrate that you met the first four Standards and at least three other Standards. You must have at least three examples for all ten Standards that your client or supervisor can attest to as part of your Application.
 - If your first three projects do not cover Standards 6-10 three times, identify up to four additional projects that demonstrate the remaining Standards 6-10.
 - Identify the supervisors or internal or external clients who will attest that the work you described was done by you and that it was of value to the organization.
5. Discuss the projects and your role with those you have selected to be Attesters
6. Complete the Candidate Information Form (page 10)
7. Read, print, sign, and date the Application Agreement (Pages 8 and 9)
8. Complete Attester Summary Form (page 11)
9. Complete the Project and Standard Identification Form (page 18)
10. Complete a Work Description Form for each project describing how the work you did met each of the Standards. Answer the questions listed under each Standard's description. Remember to write clear, concise descriptions of how you demonstrated the respective CPT Standards. This form starts on page 18.
11. Copy Sample Letter to Attester (Page 13) and Attestation Form (page 12) from the Application into a separate document.

2. Application Process, Continued

12. Complete the Attestation Form (page 12), for the projects you describe and submit the form and a copy of your Work Description for that project to the client or supervisor who will attest that you satisfactorily did the project by signing the form.
13. Send Part One of this application by mail, email (signed scanned copies are acceptable,) or fax. Part One includes the signed Application Agreement, Candidate Information Form, Attesters Summary Form, signed Attestation Forms for each of your projects, and payment if not done by credit card. PDF format is accepted for these documents. Send to:

**Certified Performance Technologist Application
International Society for Performance Improvement
PO Box 13035, Silver Spring, MD 20910 USA
Fax: 301-587-8573
E Mail: Certification@ispi.org**

14. Assemble the following from Part One and Part Two into one continuous Word document and E-mail it as a separate document to: certification@ispi.org. Do NOT put the following in a PDF format. Only Word documents will be accepted for Part Two of your application.
 - Copy of the Candidate Information Form (page 17).
 - Project and Standard Identification Form (page 18) starting with Part Two of the Application
 - Work Descriptions by project in order of the Standards addressed (starting on page 19)

Reminder: CPT applications are processed on an ongoing basis.

See the Application Process flowchart on the next page for a complete view of the process.

2. Application Process, Continued

Tips for Success

These Tips for Success will help you with your Application.

- When reviewing your past work, select projects that met the following criteria:
 - Had a beginning and an end; they were time bound.
 - Had a defined business/organizational need and proposed solution.
 - Had a cost of at least 120 hours and required some commitment of resources. They may or may not have had a budget.
 - Had discrete and new or improved deliverables.
 - Had identifiable points for interim deliverables such as reviews, approvals, decisions, events, reports, etc.
 - Required involvement by at least three people – you, your client, and possibly the end user, vested experts, stakeholders, and the like. Most projects involved more than three people.
 - You did not act on behalf of the client in providing reviews or approvals.
 - May have had one or more phases. In the case of multi-year or multi-phase projects, you can submit the sub-projects as separate projects if you define each sub-project as having a unique scope, purpose, work, and results. Minimum scope means each sub-project met the above criteria.
- Sit with a colleague and discuss projects that might be included in the submission. Provide the colleague with the Standards and talk about each. Be specific and take notes about the specific roles and tasks that you performed in the project.
- Invite the potential Attester to a preliminary discussion about the CPT Standards and the project. Listen for their perspectives, the value they believe the project had, or even ask for evaluation data or post implementation data that you may not have reviewed.
- Ask Attester to tell the project story. Often it will be viewed in a different light and help you determine how the CPT Standards were demonstrated.
- Ask the Attester if they would support your submission.
- Take time to have a colleague proofread your Application. Spell check is not adequate for a professional certification equivalent to graduate work.
- Make sure you answer each of the questions for each Standard.

2. Application Process, Continued

Tips for Success

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- You will be asked to explain your role both for the project as a whole and for individual Standards. Your role must be significant. Examples of significant roles include:
 - Conducting interviews to get information for the creation of performance standards or ideas for successfully implementing a solution
 - Developing assessment tools used to measure the changed behavior
 - Being the project lead or lead designer

In general, you need to explain how your actions directly contributed to the project's meeting a specific standard.

Application Calendar

CPT Applications are processed on a ongoing basis.

Language Policy

English is the official language of the Society.

ISPI will accept foreign language submissions for Certification under the following conditions:

- There are at least three qualified Reviewers that are proficient in the requested language
- Or the Applicant, at his/her cost, is willing to have key components of the Application translated into English at the request of the reviewing body
- An ISPI member volunteer, who is fluent in both the language of the submission and in English, can be located to serve as an advocate and point of contact to the Reviewers and Applicant during the submission evaluation and decision-making process

This service will be offered, not as an entitlement universally available to all Applicants, but based entirely on the availability of qualified language volunteers.

Before submitting an Application in a language other than English, please contact ISPI at 301.587.8570 or at certification@ispi.org.