

CERTIFIED PERFORMANCE TECHNOLOGIST



SELF-ASSESSMENT GUIDE

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Self-Assessment Guide

Introduction

This Self-Assessment Guide is intended to help you identify your proficiency in the 10 CPT Performance Standards. It is for you to use to determine your readiness to apply for the CPT designation, identify areas you may need to improve before applying and for personal development. It can also help you begin to organize your projects prior to using them for your application. It is not part of the Certified Performance Technologist (CPT) application.

Purpose

The purpose of the self-assessment is to:

- Determine your readiness for applying for the CPT designation.
- Identify the projects and attesters you will use in the application process.
- Familiarize yourself with the ten Standards of Performance Technology.
- Encourage self-reflection on your past and current experience and performance.
- Identify your strengths, weaknesses, and opportunities for improvement.
- Plan for your continued development and improvement.

Steps

1. Review the CPT Performance Standards at www.ispi.org/cpt.
2. Use the self assessment form to rate each rate each element based on your current level of proficiency.
3. For those areas that need development make note of what you plan to do to develop the skill.
4. Identify opportunities for continued development and improvement.
5. Determine your level of readiness for the certification.
6. Identify the projects and attesters you will use in the application process.

The Self-Assessment form is a Microsoft Word table so you can adjust it to meet your needs.

For the complete version of the CPT Performance Standards, visit www.ispi.org/cpt.

CPT Performance Standards

Standard 1: Focus on Results or Outcomes

Competent practitioners are *focused on results* throughout their assignments. They are not predisposed to a set of solutions. They apply their knowledge of what is required for performance at all levels.

Standard 2: Take a Systemic View

Competent practitioners *take a systemic view* of their work. This requires them to identify the subsystems that make up the total organization. They look for and recognize that a change in one area will impact other areas. They consider how the dynamics in society, the marketplace, workforce, workplace, work, and workers affect the desired outcomes.

Standard 3: Add Value

Competent practitioners *add value* by using their expertise to facilitate the process in ways that result in better decisions, higher quality work by their team, and a higher quality end product.

Standard 4: Work in Partnership with Clients and Stakeholders

Competent practitioners *collaborate* with clients and stakeholders. This means that you incorporate the appropriate stakeholders, experts, and specialists as part of the team, involving them as necessary.

Standard 5: Determine Need or Opportunity

Competent practitioners design and conduct investigations to find out the difference between the current and the desired performances (the performance gap).

Standard 6: Determine Cause

Competent practitioners design and conduct investigations to find out *why* a gap exists between the current and desired performances. They look for the underlying causes.

Standard 7: Design Solutions including Implementation and Evaluation

Competent practitioners design solutions and the plan to implement them.

Standard 8: Ensure Solutions' Conformity and Feasibility

Competent practitioners oversee the development of the solutions. They *may* develop some or all of the solutions or be a member of the development team.

Standard 9: Implement Solutions

Competent practitioners develop strategies that allow clients to sustain change.

Standard 10: Evaluate Results and Impact

Competent practitioners help clients measure the impact of the solutions.

Self-Assessment Form

Standard 1: Focus on Results or Outcomes			
Rate your ability to:	Highly Proficient	Proficient	Deficient
Help clients and stakeholders define what they want to accomplish.			
Guide clients in how to convert results into measurable terms.			
Help clients stay focused when unrelated information and needs surface.			
Challenge assumptions to uncover important priorities.			
Facilitate discussions about the worth of a problem in terms of costs, human energy, or risk.			
Help clients weigh the risk of unanticipated outcomes.			
Help clients examine the motives behind the request.			
Help clients commit the resources to complete the work.			
Help clients acknowledge some ownership for the success of the project.			
Help clients anticipate the changes required to achieve the goals they want.			

Standard 2: Take a Systemic View			
Rate your ability to:	Highly Proficient	Proficient	Deficient
Recognize how functions are interdependent.			
Recognize that a change in one area or system will impact other systems.			
See the relationship between internal practices and the marketplace and society.			
Recognize the difference between symptoms and causes.			
Help clients recognize the impact of misalignment of goals and practices.			
Recognize how decisions and misalignment affect the ability to be competitive in the marketplace.			
Make better decisions about the work.			
Question implications of decisions before acting.			
Consider others in their decisions.			

Standard 3: Add Value			
Rate your ability to:	Highly Proficient	Proficient	Deficient
Ensure the project team considers an appropriate range of solutions and the implications before taking action.			
Help clients compare factors such as: <ul style="list-style-type: none"> • Cost to design, develop, implement, and maintain or sustain each solution. • Risks and costs associated with the proposed solutions. 			
Help clients understand the: <ul style="list-style-type: none"> • Likelihood of adoption of new behaviors. • Probability of achieving the desired goals. • Implication or possible impact on stakeholders. • Ability of the organization to sustain the solution. 			
Respectfully push back and challenge assumptions.			
Represent yourself not as not having expertise beyond your capabilities.			
Effectively manage your time and resources in your area(s) of responsibility.			
Help clients appreciate the importance and value of the work and your role in accomplishing the work.			

Standard 4: Work in Partnership with Clients and Stakeholders			
Rate your ability to:	Highly Proficient	Proficient	Deficient
Involve stakeholders in the decision making around every phase of the process.			
Engage specialists as needed.			
Listen closely to your client.			
Gain client's trust and respect.			
Be honest with clients.			
Foster communication between and within groups.			
Get clients to share responsibility for the success of the project.			
Give credit to everyone who contributes to the project.			
Get clients to make the best choices.			
Ensure clients meet their needs in a sustainable way.			

Standard 5: Determine Need or Opportunity			
Rate your ability to:	Highly Proficient	Proficient	Deficient
Facilitate discussions with the client to clarify and confirm the intent of the analysis.			
Determine the scope of the analysis.			
Choose the appropriate method for the analysis.			
Determine how to best get the data.			
Gather the required data.			
Develop the tools, documents, systems to collect the data.			
Analyze the data.			
Determine the magnitude of the gap.			
Report the finding with recommendations.			
Interpret the findings for the client.			

Standard 6: Determine the Cause			
Rate your ability to:	Highly Proficient	Proficient	Deficient
Consider at least 3 of the following factors in the analysis: <ul style="list-style-type: none"> • Social and cultural factors (Society) • Marketplace (World) • Workplace • Work (design of the work) • Worker (people doing the work) 			
Choose the appropriate method of analysis.			
Decide how to get the data.			
Gather the data.			
Analyze the data.			
Determine the underlying causes.			
Report the findings with recommendations.			
Facilitate discussions with the client and stakeholder about the underlying causes.			
Interpret the results for the client.			
Suggest a combination of solutions showing how collectively they will reduce or eliminate the gap.			

Standard 7: Design Solutions Including Implementation and Evaluation			
Rate your ability to:	Highly Proficient	Proficient	Deficient
Design solutions that include: <ul style="list-style-type: none"> • The roles and responsibilities of the stakeholders required to accomplish the goals of the solution. • A description of the audiences affected by the solutions. • The objectives of the solutions. • A description of the how the solutions' elements will support performance. • What else has to be in place to support overall improved performance. • Criteria for judging the effectiveness of the solutions. • The plan with tactics to assure transfer and adoption or the solutions. 			
Facilitate the client's comprehension of the implications of the changes that will occur with the implementation of the solutions.			
Get clients to make the required resource commitments for the solutions to be effective and sustainable.			

Standard 8: Ensure Solution's Conformity and Feasibility			
Rate your ability to:	Highly Proficient	Proficient	Deficient
Ensure solutions and their elements comply with the design specifications.			
Ensure solutions elements are developmentally tested.			
Arrange pilot tests of the overall solution.			
Oversee improvements and modifications based on the developmental tests and pilot tests.			
Ensure solutions are feasible and work as intended.			

Standard 9: Implement Solutions			
Rate your ability to:	Highly Proficient	Proficient	Deficient
Develop tools and feedback mechanisms so people can monitor their own progress.			
Draft messages clients can use to report progress.			
Facilitate discussion on how to address deviations from the plan.			
Advise clients how to manage changes in practices so gains are sustained.			
Get clients to accept responsibility for the success of the change.			
Get clients to communicate progress to stakeholders.			

Standard 10: Evaluate Results and Impact			
Rate your ability to:	Highly Proficient	Proficient	Deficient
Help the clients select the appropriate measures.			
Develop a measurement strategy that includes ways to: <ul style="list-style-type: none"> • Leverage data already being collected. • Collect new data. • Analyze the data. • Summarize and report data. 			
Help develop measurement tools and methods.			
Explain the implications of the data.			
Facilitate discussions on what the data mean and how to best use the data.			
Help clients understand the results from implementing the solutions.			
Help clients recognize what else needs to be done to sustain results.			
Help clients support necessary changes to sustain the results.			

Identifying Projects that Demonstrate Your Proficiency

Introduction

The next part of the self-assessment, Project and Standard Identification form, helps you describe the projects you have completed that demonstrated your use of the 10 CPT Performance Standards. As part of the application process, you will be asked to describe three projects that you have done in the last 10 years that demonstrate proficiency in Standards 1 to 4 and at least three other Standards. You will also need to identify a client or supervisor who has full knowledge of your work and can attest to each description you provide.

Directions

Complete the Project and Standard Identification Form for each project you are using for this application.

- Think of this form as an abstract of your work for the reviewer.
- **Project Name:** Provide a descriptive name for your project.
- **Year Work Completed:** List the year the project was completed. The project must have been completed within the last ten years.
- **Standards Met:** Mark Standards 1-4 for your first three projects and **at least three** others from Standards 5-10 during that program. (To check a box, double-click the left mouse button over a box, click on properties, and click the checked button under Default to convert it to a checked box)
 - You must demonstrate all 10 Standards three times.
 - The first three projects must meet Standards 1-4 plus at least three others.
 - If the first three projects do not meet all 10 Standards, you can use up to four additional projects to describe the missing Standards (5-10).
 - A maximum of seven projects may be used for the application.
- **Project Description and Scope:** Describe the performance gap; need or opportunity; intervention(s); and its effect on the organization, community, or government. Include the project scope in terms of dollars required, number of people or locations involved, and the results achieved.
 - You should be able to show change in a measurable way.
 - The scope should be in terms of dollars required; number of people or locations involved; and the impact on the organization, successful or not.
 - The project should include at least 3 of the following levels: society, marketplace, workforce, workplace, work and worker.
- **Attester Name:** The client or supervisor who has full knowledge of your work and can attest to the description you provide.
- **Your Role:** Briefly describe your role on this project. Your role should be significant.

The Project Standard and Identification form is a Microsoft Word table so you can adjust it to meet your needs.

Project and Standard Identification Form

Project Name:

Attester Name:

Year Work Completed:

Standards Met:* Principles: 1 2 3 4
Process: 5 6 7 8 9 10

Project Description and Scope:

Your Role:

*To check a box, double-click the left mouse button over a box, click on properties, and click the checked button under Default to convert it to a checked box

Project and Standard Identification Form

Project Name:

Attester Name:

Year Work Completed:

Standards Met:* Principles: 1 2 3 4
Process: 5 6 7 8 9 10

Project Description and Scope:

Your Role:

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Project and Standard Identification Form

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Attester Name:

Year Work Completed:

Standards Met:* Principles: 1 2 3 4
Process: 5 6 7 8 9 10

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Your Role:

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Project and Standard Identification Form

Project Name:

Attester Name:

Year Work Completed:

Standards Met:* Principles: 1 2 3 4
Process: 5 6 7 8 9 10

Project Description and Scope:

Your Role:

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Project and Standard Identification Form

Project Name:

Attester Name:

Year Work Completed:

Standards Met:* Principles: 1 2 3 4
Process: 5 6 7 8 9 10

Project Description and Scope:

Your Role:

*To check a box, double-click the left mouse button over a box, click on properties, and click the checked button under Default to convert it to a checked box.

Project and Standard Identification Form

Project Name:

Attester Name:

Year Work Completed:

Standards Met:* Principles: 1 2 3 4
Process: 5 6 7 8 9 10

Project Description and Scope:

Your Role:

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Project and Standard Identification Form

Project Name:

Attester Name:

Year Work Completed:

Standards Met:* Principles: 1 2 3 4
Process: 5 6 7 8 9 10

Project Description and Scope:

Your Role:

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Project and Standard Identification Form

Project Name:

Attester Name:

Year Work Completed:

Standards Met:* Principles: 1 2 3 4
Process: 5 6 7 8 9 10

Project Description and Scope:

Your Role:

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