



THE INSTITUTE
FOR PERFORMANCE
AND LEARNING

CTP/CTDP CERTIFICATION STANDARD PATH TOOLKIT

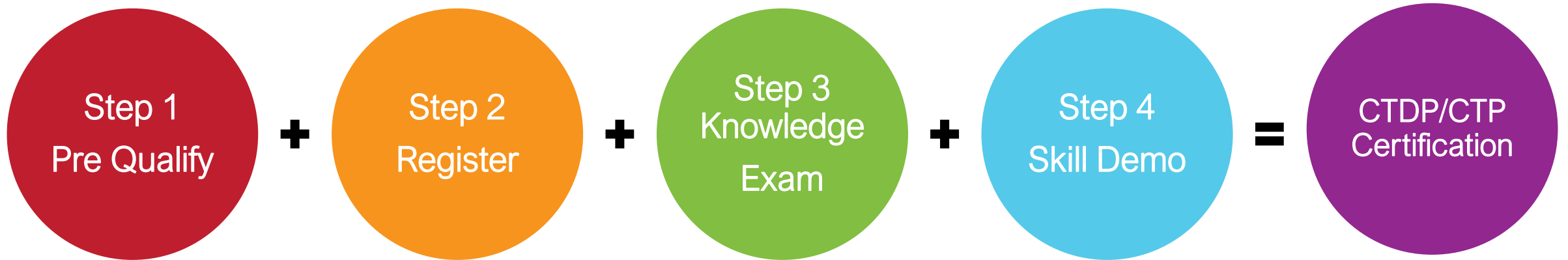
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Intro to Toolkit

- This toolkit is designed to assist candidates to prepare and succeed in their certification assessment
- The content is written in the first person by the authors of this toolkit, based on their own experiences
- The content includes tips, tools and recommendations provided by certified members who have recently gone through the process
- Please note, the certification process is an individual endeavour and therefore you should still study, plan and prepare for the assessments based on your own terms, preferences and discretion

Certification Process



DURATION TO COMPLETE: 1 YEAR

See [Fact Sheet](#) for Information on Step 1 & 2

Knowledge Exam Prep

The following points were prepared by Rafal Bartkow:

- The exam is based on the Competencies Framework document, which is not a textbook but rather a guide or a manual, and you need to treat it that way. It is a summary of your expected expertise, not a tutorial. You may want to use it as a checklist to see what you're missing.
- If you feel you need to expand your knowledge in certain areas, it might be helpful to take classes on Adult Learning and refer to professional books on the topic.
- The Competencies Framework is not an easy read - it's over 100 pages of bullet points! I carefully reviewed it 3 times, and figured out how to efficiently maneuver within the document (yes, a lot of highlighting, page markings, whatever works for you!)
- I created a shortcut or a "key" for the document: there are summary pages for every Competency at the beginning of each chapter: pages 19, 33, 47, 61, 79, 93, 101.
- Once you master the content of these pages, you will be able to quickly identify the Competency and supporting competencies that relate to an exam question. Next, filter through the sub-competencies and skills that a question might be testing you on. It is crucial to know this first layer before diving into more details.

Knowledge Exam Prep (Cont.)

The following points were prepared by Merertu Frissa:

- Start by familiarizing yourself with the Competencies by going through it once or twice. By doing so, you will note how the main and supporting competencies build on each other which will help you easily master them.
- You will also note how each competency is connected; understanding one help you understand and master each. For instance, the second level competency, Plan to support transfer of learning (4c) on page 26 is also addressed in Design for transfer of learning on page 64.
- I highly recommend reading the suggested books in the selected bibliography particularly those marked with * as you prepare for the exam and to gain knowledge.
- I also found attending some of the webinars valuable especially those that helped me improve.
- Exchange review questions and answers with a colleague/study partner

Skill Demonstration (Work Product)

After passing the Knowledge exam candidates choose which skill demonstration they will complete*:

For Certified Training and Development Professional (CTDP)

- Assessing performance needs
- Designing learning experiences
- Facilitating training

For Certified Training Practitioner (CTP)

- Facilitating learning

* Worksheets are available to download from I4PL Website

How to choose the project you are submitting

Facilitation Video (by Narcisco Erandio):

- Comfortability of the topic: I needed to exude confidence during the facilitation of the training and this was only possible if I was 100% comfortable with the topic that I was discussing. By being comfortable I could convincingly answer all questions, I could create a welcoming environment and I could deliver my piece without exerting too much effort.
- Quality of the topic: Here I asked myself: Was this topic be interesting enough to engage the learning audience, because if not, then I wouldn't be able to meet all the requirements of the facilitation worksheet. Would it be stimulating that the learners would be curious and ask questions? Would my topic play an important role in the audience's daily work responsibilities? If not, then they would not 'feel' it and would just hear me without listening to me. Were my topic points thought-provoking and variable enough to solicit different views that encourage healthy discussions?

How to choose the project you are submitting

Facilitation Video (Cont.):

- Scope of topic: Here I had to maintain balance. The topic of my choosing should be long enough to accommodate all the requirements of the facilitation worksheet but short enough to not exceed 4 hours. Choosing a topic that involved software operation was an excellent decision because meaningful hands-on exercises could be done in a short period of time. As well, objective assessment criteria could be easily set making the assessment period quick.
- Extra Tip: Be sure to balance the amount of instructional time and practice portion for your skill demo. This one passed with flying colours. Think in real-world terms and over-index on the practice portion of your session as that is a very important skill to demonstrate. It is your responsibility to point assessors to the exact moments when you demonstrate the required competencies.

How to choose the project you are submitting

Assessing Performance Needs:

- If your current job/role/organization is supporting you with this professional milestone, work with them to see if there is a particular topic of interest to be covered this will allow for:
 - Demonstration of skills
 - Support current business initiatives
 - Reinforce your commitment to your role at current organization (Vanessa Bahorie)
- I selected a project that would leave the adjudicator remembering my name and the project I submitted. As I thought about all the project I have done in the past, I knew that I needed a project that displayed my comprehension in all of the Institute's competencies. I went back and reviewed all the major projects I created, and selected one that I excelled well in – Needs Assessment. (Yomna Ibrahim)
- Make sure you select a project that addresses all quality criteria. Read the Skill Demonstration Worksheet hand in hand with Assessing Performance needs competency to help with this. (Meretu Frissa)

Words of wisdom from the Assessors

Project & Project Selection:

- Carefully select your project – make sure that it meets the criteria
- Don't exaggerate your role in the selected project – if aspects were conducted by others (vendors, colleagues, subordinates) be clear about that.
- Provide full project documentation like timelines, roles/responsibilities, signoff processes, change requests etc.
- Candidates tweak quotes from assessment criteria to be embedded within their submission however their project details do not reflect actual implementation

How to work your way through the worksheet

- Remember to make it easy for the assessors to find and assess when and where you demonstrate the competencies (Assessors)
- I used the worksheet as the blueprint for my instructional design / leader guide. This allowed me to ensure that each competency was represented in my session. It pointed out areas that I may not have focused on in the past, and ensured that they were included in my session. (Stephen Wright)
- I used the Competency workbook as a reference guide to make sure I wasn't forgetting anything. Other than that, I used a laptop, PPT slides, handouts, and a GoPro camera and tripod to complete my skill demo. (Stephen Wright)

How to work your way through the worksheet

- Once I selected the project I was submitting, I knew that I had to clearly indicate my competency. I used the worksheet to help guide me through the areas that indicated my competency in the project. I first looked at the questions that were being asked and filled in the comments on worksheet, then I indicated EXACTLY where in my project are the skills for each of the questions. (Yomna Ibrahim)
- I worked my way through the worksheet by first starting with a simple draft of the Needs Assessment Report. This helped me identify key information that needs to be included especially that the report is the outcome of information and process gathered to successfully complete the assessment of performance needs. The draft had bullet points of what I would include under each point reflective of what was listed under a. and b. of the quality criteria. (Merertu Frissa)

Completing the Skill Demo Worksheet

The KEY is to answer ALL the questions in the Worksheet.

I repeat, do not leave anything blank! 😊

- It can happen that the Worksheet requires a description of a situation that did not take place during your facilitation (other than something you were in full control to plan ahead of the session e.g. Formal Welcome to Learning or Group Discussion).
- During my facilitation session I did not observe, and hence did not have to manage a disruptive behavior. Instead of leaving this answer blank, I responded with a description of what **specifically** I have done in the past when this situation has taken place.
- Keep your responses concise and be sure to indicate exactly where the supporting evidence can be found in your documentation (if required)
- Lastly, do not forget to include all the other documents that will accompany your submission e.g. your resume and references (make sure you give the person referring you enough time to complete and return the reference worksheet – plan, plan, plan!).

What Documents/Data to include

- Available: The document and data should be readily available. Not something that you need to wait for a month or two to acquire. Something that does not depend on other people to obtain, i.e. standard forms, common application screenshots, etc. I wanted to control my own timing for submission and I didn't allow other people to dictate or slow down the process. (Narciso Erandio)
- Compelling: The documents and data should be real to convince the assessor of one's competencies. Such can be authentic enough without sacrificing privacy nor breaking any rules on confidentiality. Showing the name of the standard forms for example, the screenshot of the name and logo of the tools/software used, as well as the exchange of communications, with real people's names redacted helped provide a more convincing evidence of my competencies. (Narciso Erandio)

What Documents/Data to include

- Up-to-date: The preparation for project submission can take several months. Because of this, a certification candidate might end up submitting outdated documents and data. I made sure that I double checked attached documents and data to reflect the most recent information, interaction or exchanges that match appropriate requirements in the project worksheet. (Narciso Erandio)
- I thought that more is information that I provided would be better and easier for me to explain in my worksheet. The more context that I submitted alongside my worksheet would and could only work in my favor – so long as I was able to explain the place of it. (Yomna Ibrahim) Note from assessors: remember to clearly indicate in your worksheet which specific document(s) demonstrate skills so they can find it easily.
- While you are addressing the quality criteria, your supporting documents need to clearly identify the required key output under each competency. (Merertu Frissa)

Recommendations

- Start as soon as you get the worksheet, make and create time to review and complete it! I scheduled time in my calendar dedicated to work on the project solely. I made several rough drafts, and made sure that each time I made any revisions, I answered all the questions as best I possibly could. I started well in advance so that I could avoid any last minute edits. (Yomna Ibrahim)
- If you have the time, use the competencies and the worksheet as a template for completing your project in the real world (Chair, Certification Committee)
- The largest challenge I faced was understanding the project incorrectly at my first attempt, then realizing quickly my errors. The advantage I had was time. Since I started early and created the time, I was able to re-work it with ease. (Yomna Ibrahim)
- The main piece of advice I would extend to anyone submitting a work product on Needs Assessment, would be to take the time and understand the instructions and work through the worksheet step by step. (Yomna Ibrahim)
- I don't advise you to want to complete this in a rush as you need to address each question in the worksheet. The Worksheet has an example at the start; use that as a guide. (Merertu Frissa)
- Give yourself enough time to revise, proof read, and edit. (Merertu Frissa)
- Follow the Work Product Submission guide to ensure you have included all requested material using the right label. (Merertu Frissa)

Words of wisdom from the Assessors

General tips:

- Remember: not all performance gaps have learning solutions
- Connect with a colleague or alumni who has a CTP or CTDP designation. Walk through each competency to ensure you understand the requirements of each.

Submitting under the “Assessing performance needs” competency (CTDP):

- Performance gaps are about people, not programs i.e. “we expect with this program we'll increase the participation rate by x”. Not correctly assessing performance gaps impacts all other components like objectives and evaluation, so getting this right is critical.
- Candidates with business backgrounds sometimes assess a business process gap as opposed to a performance gap. A performance gap indicates what we need people to start doing, do more of, do better or differently.

Words of wisdom from the Assessors

Submitting under the “Designing learning experiences” competency (CTDP):

- The most common issue is candidates do not state desired performance outcomes and performance gap(s). A strong task analysis is critical to doing this well.
- It is critical to be able to conduct a task, job or goal analysis and include the results in your evidence.
- We also often tend to see tend to see a misalignment between learning objectives and practice activities and evaluation of learning.
- Candidates with business backgrounds sometimes assess a business process gap as opposed to a performance gap. A performance gap indicates what we need people to start doing, do more of, do better or differently.
- Candidates often neglect to link learning objectives to specific learning activities to specific measurement/evaluation/assessment activities.
 - Make a table: first column performance gap, learning objective, then location, then topics, then activities, then evaluation, then performance gap.
 - Make sure learners get to practice what they are meant to achieve (the learning objective).

Words of wisdom from the Assessors

Submitting under the “Facilitating learning experiences” competency (CTP):

- The most common issue is that submissions are presentations, heavily facilitator-led and don't include a demonstration of assessing individual performance or application of learners. We encourage applicants to engage in an inquiry process about the difference between a 'presentation' versus a 'facilitated' session.
- When facilitating large group discussions we should be seeing more learner-to-learner versus facilitator-to-learner.
- Be sure to include data about the prior knowledge of the learners and clearly articulate the need for the learning experience.
- Learning objectives must be designed in measurable terms. I see a lot of 'understand' and 'know how to' objectives. Further, consider how many objectives are realistic for a short session. It is better to design a session around one or two measurable learning objective - written using the 3-part method; Condition, Performance Statement, Criterion.
- Use the language of the competencies in your facilitated session and in your worksheet.
- It's recommended that you spend most of your facilitation efforts in engagement in practice activities, the debrief and engagement of learner through discussion.
- Make sure learners get to practice what they are meant to achieve (the learning objective), and ensure there is a demonstration on how each learner is assessed against learning objective(s).

Project – Facilitating Learning

- My first step in preparing for the project was carefully reading the Skill Demo Worksheet, and the Facilitating Learning Competency.
- I took notes of the questions in the Worksheet to make sure that my project addresses and demonstrates ALL the requirements:
 - Formal welcome to learning
 - Setting up ground rules
 - Management of disruptive behavior
 - Delivery of content
 - Group discussion
 - Learner questions and comments
 - Visual aids
 - Activities and practice (including transfer activities)
 - Assessment of performance and feedback/coaching
 - Partnering with clients
- This is a lot to be included to demonstrate the required competencies; I decided to work backwards and prepare my session around those requirements.



Example of a 30min Agenda

- Below is my Agenda for a 30min facilitated session – this is only to demonstrate what worked for my project.
- Your Agenda may look very different from this example – whatever you believe will work best for your content and your audience!

TIME	ACTIVITY
3min	INTRODUCTION (includes personal introductions, demonstrating my credibility, housekeeping items, and setting up ground rules).
5min	CONTENT DELIVERY (discussion around the main topic of the session, and helping learners identifying what they already know based on their experience as a foundation for the new knowledge to be acquired during the workshop).
8min	CONTENT DELIVERY – Learning objective 1
3min	PRACTICE ACTIVITY – based on Learning objective 1 (learners working in pairs)
3min	CONTENT DELIVERY – Learning objective 2
8min	PRACTICE ACTIVITY – based on Learning objectives 1&2 (group work and a quick wrap up)

Example Agenda

- Include a high-level outline of the learning program you will use for your demonstration. Be sure to indicate how the learning objectives are aligned to activities used to enable learners to practice the skills or knowledge they will acquire.
- Please also indicate how you will assess achievement of those learning objectives during the demonstration.

Activity	Learning Objective	Evaluation	Start Time
Introduction	n/a	n/a	10 min
Instruction: types of bias	n/a	n/a	20 min
Breakout activity: • Groups identify biases in scenarios • Debrief in plenary	Learners will be able to identify biases that may show up in business decisions.	Application activity to identify biases	20 min
Next topic	Next learning objective	Next evaluation strategy	
...	...	...	
Wrap up and close	n/a	n/a	5 min

Video Recording



- No special equipment required: my video was recorded with my personal phone.
- I positioned the camera to capture myself, the learners, the projector, and the flip chart.
- I tested the camera set up prior to participants entering the room – I recorded a short sentence from the facilitator position to make sure that I am heard properly on the video (might be helpful not to place the camera too far back in the room).
- Size of the audience: I made sure I have at least 4 learners in the room – in my opinion this is a minimum that allows for an interactive session, and I was able to facilitate both pair work and group practice activities.



For further Inquiries please contact
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