



THE INSTITUTE
FOR PERFORMANCE
AND LEARNING

CTDP CERTIFICATION STANDARD PATH TOOLKIT

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Introduction

- 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.
- 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



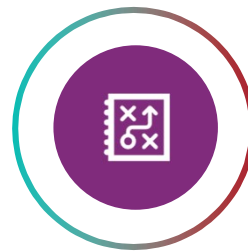
REGISTRATION



SELF-
ASSESSMENT &
REFERENCES



KNOWLEDGE
EXAM



SKILL DEMO
PRE-APPROVAL



SKILL DEMO
SUBMISSION



CERTIFICATION

Knowledge Exam Prep

The following points were prepared by Rafal Bartkow:

- The exam is based on the Competencies 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 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.

How To Choose The Project You Are Submitting

Facilitation Video (by Narcisco Erandio):

- Comfort: 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: 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 competency category. 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 (Cont.)

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 for Facilitating, 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.
- Be sure to balance the amount of instructional time and practice portion for your skill demo. 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 (Cont.)

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 instructions 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. Review the key outputs carefully.
- 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 context/audience information, timelines, roles/responsibilities, signoff processes, change request process, etc.
- The Skill Demo Pre-Approval step can be very helpful in choosing the best project for your skill demo. Take the time to answer the questions as thoroughly as you can and carefully review the feedback provided by the assessor.

Completing The Skill Demo Submission

- Remember to make it easy for the assessors to find and assess when and where you demonstrate the key outputs. (Assessors)
- I used the skill demo instructions 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)
- Once I selected the project I was submitting, I knew that I had to clearly indicate my competency. I used the instructions 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 the online form, then I uploaded the corresponding evidence, and indicated the exact pages the assessor would find the information. (Yomna Ibrahim)
- I worked my way through the submission instructions 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 Submission (Cont.)

The KEY is to answer ALL questions in the online submission form. Do not leave anything blank! 😊

- It can happen that the submission form 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), so you must provide a specific example of how you have handled such a situation in the past.
- During my facilitation session I did not observe, and hence did not have to manage, 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 upload the document(s) that showcase you mastering the key output.

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)
- 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)

What Documents/Data To Include (Con't)

- While you are addressing the quality criteria, your supporting documents need to clearly identify the required key output under each competency. (Merertu Frissa)
- It's ok to submit the same document for more than one Key Output. Be clear in the comments where the Assessment Criteria is demonstrated in each instance (page numbers, time stamps, etc.). (Assessors)

Recommendations

- Start thinking about your project and submit for pre-approval as soon as possible.
- Download the submission instructions, make and create time to review and start filling it in on the word document so it's easy to transfer to the online submission form when you're ready!
- 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 instructions as a template for completing your project in the real world.
The main piece of advice I would extend to anyone submitting a work product on Assessing Performance Needs, would be to take the time to understand and work through the instructions 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 online form. (Merertu Frissa)
- Give yourself enough time to revise, proofread, and edit. (Merertu Frissa)

Words Of Wisdom From The Assessors

General tips:

- Review the Certification Handbook, Submission Instructions, and Competencies for Performance and Learning Professionals.
- Remember not all performance gaps have learning solutions
- Connect with a colleague or alumni who has a CTDP designation. Walk through each competency to ensure you understand the requirements of each.

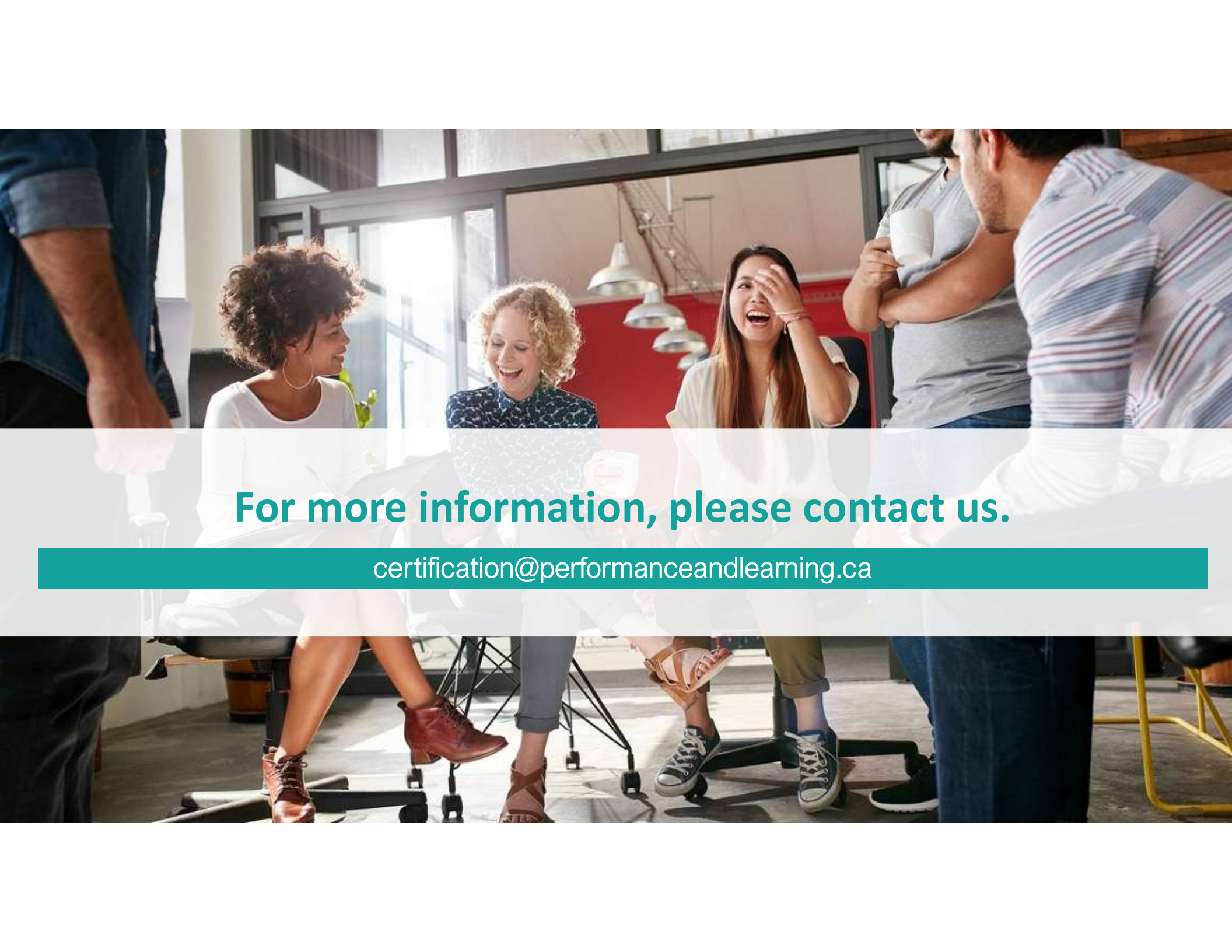
Submitting under the “Assessing performance needs” competency (CTDP):

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

Words Of Wisdom From The Assessors (Cont.)

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 tend to see a misalignment between learning objectives and practice activities and evaluation of learning.
- Candidates often neglect to link learning objectives to specific learning activities to specific measurement/evaluation/assessment activities. Make sure learners get to practice what they are meant to achieve (the learning objective). And that it's clear they can achieve it as required (evaluation).
 - Make a table: first column performance gap, learning objective, then location, then topics, then activities, then evaluation, then performance gap.



For more information, please contact us.

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