

## IMPORTANT NOTE

Your skill demonstration pre-approval and work product submissions will be completed via an online application. The online form can be found [here](#). If you click on Preview, you will be able to see the entire form for all competency categories so you can determine which is right for you.

Please note, there is no ability to complete a “spellcheck” on the online form, so you may wish to capture your responses in this or a separate document and copy the information to the online form.

## Instructions

Prior to selecting a project for your submission, please prepare by reviewing *Competencies for Performance and Learning Professionals*© *Assessing Performance Needs* and *Partnering with Clients*.

### Competent assessment of performance needs ensures:

- The facts support any assumptions
- You address the right problem(s) and cause(s)
- You don't jump to a learning solution
- You identify the best solution or blend of solutions
- You determine how to evaluate results

### Competent partnering with clients increases the likelihood you:

- Get the input you need to achieve or exceed expectations on an assignment
- Expand your client's and own thinking about effective and innovative solutions
- Meet the needs of both the learner and the organization sponsoring the project
- Minimize misunderstandings, surprises and disappointments by anyone on the project
- Build commitment to effective implementation of solutions
- Complete projects on time and within budget
- Maintain client satisfaction throughout the project

## About this document

This document has been designed to help you:

- Select content that meets all the requirements for the skill demonstration
- Identify the key outputs you will need to address, as well as the quality criteria by which they will be evaluated
- Ensure you provide all the relevant documentation with your submission

## Selecting a project that meets the criteria

Your work product submission must be an original and current project undertaken in the past two years, and you must be authorized to submit the supporting documentation.

It is important that you select a project that will enable you to demonstrate the competencies for performance and learning professionals in action.

This document indicates the key outputs required from the **Assessing Performance Needs** and the **Partnering with Clients** competency categories. We also recommend you preview the entire submission form [here](#) to see the format and information required.

You will be required to provide evidence of, or comment on, each of the Key Outputs identified in the worksheet so it's essential to select a project that gives you an opportunity to do that. The corresponding Assessment Criteria indicate what makes that output high quality.

## Skill demo pre-approval

Preparing your skill demonstration is no small feat, and we want to set you up for success.

Prior to commencing your skill demonstration submission, we ask you to share the **context** behind the assessment you have chosen, as well as the performance gaps you will be addressing. A member of the assessor team will review what you share to ensure you are on the right track, and share feedback if you are not.

Please submit for pre-approval via this [Skill Demo Pre-Approval form](#) prior to scheduling your skill demo submission.

Once your topic has been approved, you are welcome to proceed to scheduling your skill demonstration.

## Scheduling your skill demonstration

Once your project has been pre-approved, you will receive a confirmation email with your assigned submission date, determined by your cohort's schedule. You will be invited to submit your skill demo via the same link used for the pre-approval.

## Showing how you addressed the assessment criteria

Go through the online form section by section and answer all questions. Begin with the key outputs in **Assessing Performance Needs** followed by the key outputs in **Partnering with Clients**.

Please note, there is no ability to do a "spell check" in this platform, so you may wish to answer the questions in the instructions form and copy them over to this platform.

You are asked to provide specific references to your materials where certain assessment criteria should be observable by the assessors. You should upload the corresponding document for each key output. It may mean you upload the same document more than once if it provides evidence of multiple key outputs.

You are also asked to provide a clear concise description of how your demonstration meets certain assessment criteria. In some cases, you may also be asked to describe how you validated the output, or ensured it was correct and relevant

### The key outputs to be addressed include:

- ✓ Plan for assessing performance needs
- ✓ Job, competency or goal analysis
- ✓ Analysis of performance gaps and opportunities to improve performance
- ✓ List of causes of performance gaps
- ✓ List of other performance solutions in order of priority
- ✓ List of learning solutions in order of priority
- ✓ Plan for supporting transfer of learning
- ✓ Plan to evaluate transfer of learning & business results
- ✓ Needs assessment report

### Submission Instructions

The following pages indicate the key outputs and assessment criteria to be addressed.

All responses and supporting documentation must be submitted via this [Skill Demo Submission form](#). Ensure you have included:

- Responses to all fields pertaining to the key outputs, or N/A where not applicable
- Supporting documentation, uploaded as .pdf format
- Specific references to required evidence or examples
- Individual documents uploaded in alignment to the key outputs and naming convention:  
*FamilyName\_GivenName\_#1*

Be sure to navigate to the final page to click on Submit your work product prior to the deadline.

**Please note:** Submissions which do not meet this criterion will be assessed as not having met the standard. Any resubmission will be subject to the resubmission fee.

### Cancellation and Rescheduling Policy

Skill demonstrations will not be accepted after the confirmed submission date, as described above. Should you wish to reschedule, you must notify the certification coordinator and pay the fee to [Reschedule your Skill Demo](#) and schedule a new submission date via the [I4PL website](#). If your reschedule date falls outside your original one-year candidacy, you will also need to pay the fee to extend your candidacy.

# 1 Prepare to assess

Mastering these competencies typically involves the following outputs. The assessment criteria indicate what would make the output appear to be high quality. Please ensure that your responses and supporting materials address all criteria indicated.

| Key Output                                  | Assessment Criteria                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
|---------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Plan for assessing performance needs</b> | <ul style="list-style-type: none"> <li>• Plan includes rationale for assessing performance needs, resources required, budget, target audience to be studied, data required, rationale for data collection method(s), who should provide data, sample size and distribution of data</li> <li>• Plan includes comprehensive list of activities and timing, with clear roles and responsibilities</li> <li>• Plan describes proposed content of the needs assessment report</li> <li>• Plan addresses needs and concerns of client and other stakeholders</li> <li>• Plan is approved by client</li> </ul> |

**Indicate the specific location(s) in your materials where the plan for assessing performance needs is documented:**

**Describe specifically how you validated the plan with the client:**

## 2 Identify performance gaps

| Key Output                              | Assessment Criteria                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
|-----------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Job, competency or goal analysis</b> | <ul style="list-style-type: none"> <li>• Appropriate method of analysis is used</li> </ul> <p><i>For job analysis:</i></p> <ul style="list-style-type: none"> <li>• Identifies functions and tasks for specific roles</li> <li>• Identifies performance standards for tasks</li> <li>• Clearly stated using active and appropriate verbs</li> </ul> <p><i>For competency analysis:</i></p> <ul style="list-style-type: none"> <li>• Identifies competencies and sub-competencies within a structure or framework</li> <li>• Clearly stated using active and appropriate verbs</li> </ul> <p><i>For goal (topic) analysis:</i></p> <ul style="list-style-type: none"> <li>• Identifies specific tasks related to a goal or topic</li> <li>• Identifies performance standards for tasks</li> <li>• Clearly stated using active and appropriate verbs</li> </ul> |

Indicate the specific location(s) in your materials where the job, competency or goal analysis is documented:

Describe specifically how you determined what type of analysis was required:

## 2 Identify performance gaps

| Key Output                                                                   | Assessment Criteria                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
|------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Analysis of performance gaps and opportunities to improve performance</b> | <ul style="list-style-type: none"> <li>• Analysis identifies gap(s) between current and desired performance outcomes</li> <li>• Analysis stated in terms of specific performance outcomes</li> <li>• Performance outcomes state observable outcome desired and conditions under which the outcome may be achieved</li> <li>• Analysis identifies business measures and targets that will indicate whether performance outcomes have been achieved</li> <li>• Analysis based on accurate and reliable data</li> <li>• Analysis determines cause-effect relationships among performance gaps</li> </ul> |

Indicate the specific location(s) in your materials where the analysis is documented:

Describe specifically how you identified the performance gaps and any cause-effect relationships among them:

### 3 Determine causes of performance gaps

| Key Output                                | Assessment Criteria                                                                                                                                                                                                                                                                                       |
|-------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>List of causes of performance gaps</b> | <ul style="list-style-type: none"> <li>• Causes based on accurate and reliable data and sound analysis</li> <li>• List of causes considers all likely causes at a job, process and organization level</li> <li>• List of causes identifies cause-effect relationships among the various causes</li> </ul> |

Indicate the specific location(s) in your materials where the causes of the performance gaps are documented:

Describe specifically how you identified the causes of performance gaps and any cause-effect relationships among them:

## 4 Identify solutions for closing gaps

| Key Outputs                                                            | Assessment Criteria                                                                                                                                                                                                                                                                                                                                                                                               |
|------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>List of <i>other performance solutions</i> in order of priority</b> | <ul style="list-style-type: none"> <li>List identifies how each solution will address causes of specific performance gaps to achieve desired performance outcomes</li> <li>List identifies dependencies on other solutions recommended</li> <li>Solutions include descriptions of actions required to implement each solution</li> <li>Solutions include estimate of resources and technology required</li> </ul> |

Indicate the specific location(s) in your materials where the *other performance (non-training) solutions* are identified:

| Key Outputs                                                   | Assessment Criteria                                                                                                                                                                                                                                                                                                                                                                                                      |
|---------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>List of <i>learning solutions</i> in order of priority</b> | <ul style="list-style-type: none"> <li>List identifies how each solution will address causes of specific performance gaps to achieve desired performance outcomes</li> <li>List identifies dependencies on other solutions recommended</li> <li>Solutions include descriptions of actions required to implement each solution</li> <li>Solutions include an estimate of the resources and technology required</li> </ul> |

Indicate the specific location(s) in your materials where the *learning solutions* are identified:

Describe specifically how you determined these *learning solutions* would contribute to closing the performance gaps:

Briefly describe how you prioritized the *learning and other performance solutions*:

## 4 Identify solutions for closing gaps

| Key Outputs                                     | Assessment Criteria                                                                                                                                                                                                                                                                                                                                                                                       |
|-------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Plan for supporting transfer of learning</b> | <ul style="list-style-type: none"> <li>Plan includes realistic solutions for transfer of learning to the workplace, based on desired performance outcomes</li> <li>Plan identifies resources and time required to implement support for transfer of learning</li> <li>Plan includes communication and follow-up activities</li> <li>Plan identifies technology to support transfer of learning</li> </ul> |

Indicate the specific location(s) in your materials where the plan for supporting transfer of learning is documented:

Describe specifically how you validated the plan for supporting transfer of learning:

| Key Outputs                                                         | Assessment Criteria                                                                                                                                                                                                                                                                                                                                     |
|---------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Plan to evaluate transfer of learning &amp; business results</b> | <ul style="list-style-type: none"> <li>Plan identifies what data will be gathered and analyzed</li> <li>Plan identifies when evaluation will be conducted</li> <li>Plan includes benchmarks of pre-intervention performance outcomes and business results</li> <li>Plan includes estimate of resources required to implement evaluation plan</li> </ul> |

Indicate the specific location(s) in your materials where the plan to evaluate transfer of learning & business results is documented:

Describe specifically how you validated the plan for evaluating transfer of learning & business results:

## 5 Validate next steps and measures

| Key Outputs                    | Assessment Criteria                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
|--------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Needs assessment report</b> | <ul style="list-style-type: none"> <li>Report includes executive summary, purpose, process, key findings, potential performance outcomes and recommended business measures, implications of not addressing performance gaps, rationale for recommended training and non-training solutions, target audience for training and whether training is mandatory</li> <li>Report updated to include modifications based on feedback from the client and key stakeholders</li> </ul> |

Indicate the specific location(s) of the needs assessment report:

Briefly describe a specific example of how you addressed a question or concern raised by the client or a stakeholder (whether during a formal presentation or another informal mechanism):

- What was the question or concern?
- How did you respond?
- What impact did it have on the report and recommendations?

## Partnering with clients

Partnering with clients is a skill that is integral to your success, since all your work as a performance and learning professional is client-focused. Whether you are internal to an organization or an external service provider, you will have clients.

Partnering with clients consists of five critical competencies:

- Demonstrate awareness of client organization
- Support clients in making effective choices,
- Develop agreements with clients,
- Manage changes throughout a project, and
- Interact effectively

The specific Partnering with clients competencies you need may vary with your role and the project, and at various stages in your career.

### Demonstrating how you Partner with clients

We have left this section intentionally open so that you have an opportunity to determine which competency or competencies are most relevant for you to share with the assessor to demonstrate how you, as a learning and performance professional, partner with clients.

You may wish to review the main and supporting competencies in [Partnering with Clients](#), to get a sense of what high quality outputs and criteria would look like and determine which examples from your career best represent how you have partnered with clients.

### Describe a situation in which you partnered effectively with a client.

- Which competency or competencies did you leverage?
- What did you do especially well?
- What was the outcome or decision?

### Describe a situation where you struggled to partner with a client.

- What did you learn?
- What would you do differently next time?