

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 the *Competencies for Performance and Learning Professionals*© **Designing Learning Experiences** and **Partnering with Clients**.

Competent design of learning experiences ensures:

- Learning objectives support desired performance outcomes and business measures
- Content is focused on “need to know” versus “nice to know”
- Tasks are presented clearly and concisely
- Opportunities for practice are frequent and effective
- Materials support learning
- Learners can demonstrate new skills and knowledge
- Learning is transferred to and sustained in the workplace
- Facilitators and learners are set up for success with well-designed learning experiences

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 *Designing Learning Experiences* and *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 program you have chosen, as well as the performance objectives 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 *Designing Learning Experiences* followed by the questions 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:

- ✓ Desired performance outcome(s) and performance gap(s)
- ✓ Context requirements for learning
- ✓ Task analysis
- ✓ Learning objectives
- ✓ Design for evaluation of learning objectives
- ✓ Detailed outline for learning experience
- ✓ Design for supporting transfer of learning
- ✓ Learner materials
- ✓ Facilitator materials
- ✓ Storyboards
- ✓ Web-based learning
- ✓ Materials to support transfer of learning

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](#). If your reschedule date falls outside your original one-year candidacy, you will also need to pay the fee to extend your candidacy.

1 Conduct design analysis

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
Desired performance outcome(s) and performance gap(s)	• Analysis acknowledges any assessment of performance needs already conducted • Gap between current and desired performance outcomes is clear • Gap is stated in terms of specific performance outcomes • Analysis confirms that performance gap(s) can be addressed through a learning solution and related transfer activities

Indicate the specific location(s) in your materials where the desired performance outcomes and gaps are documented:

Describe specifically how you confirmed the desired performance outcomes and gaps could be addressed through training and related transfer activities:

Key Output	Assessment Criteria
Context requirements for learning	• Context requirements documented, feasible, accurate • Context requirements include relevant information about the learners, design constraints and technical constraints • Impact of context requirements on design identified

Indicate the specific location(s) in your materials where the context requirements for learning are documented:

Describe specifically how you validated the context requirements for learning:

1 Conduct design analysis

Key Output	Assessment Criteria
Task analysis*	• Task analysis is documented and comprehensive • Task analysis is based on first-hand knowledge of job responsibilities • Task analysis identifies sub-tasks, skills and knowledge required to achieve desired performance outcomes • Task analysis uses active and appropriate verbs

* Please note, a task analysis is a critical foundation of performance-based learning. If you are unclear about what is involved in conducting a task analysis, or what the results should look like please refer to the competencies and other resources indicated in the Getting Certified section of the website.

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

Describe specifically how you ensured the task analysis:

- was comprehensive
- was based on first-hand knowledge of job responsibilities
- identified sub-tasks, skills and knowledge required to achieve desired performance outcomes

Describe specifically how you validated the task analysis:

2 Establish learning objectives and evaluation

Key Output	Assessment Criteria
Learning objectives	• Learning objectives documented and validated • Appropriate level of learning (such as recall, comprehension, application, analysis, synthesis, evaluation) is clear for each learning objective • Learning objectives include observable outcome, condition and standard for each objective at an application, analysis, synthesis or evaluation level • Learning objectives sequenced for ease of learning • Learning objectives aligned with desired performance outcomes

Indicate the specific location(s) in your materials where the learning objectives are documented:

Describe specifically how you determined the appropriate level of learning for each learning objective:

Describe specifically how you ensured the learning objectives:

- were sequenced for ease of learning
- were aligned with desired performance outcomes

Describe specifically how you validated the learning objectives:

2 Establish learning objectives and evaluation

Key Output	Assessment Criteria
Design for evaluation of the learning objectives*	• Evaluation method(s) appropriate to level of learning objectives • Evaluation method(s) ensures outcome is observable • Evaluation method(s) indicates how the evaluation is to be assessed • Evaluation method(s) identifies assessment and administration procedures (such as scoring, opportunity to re-try) • Evaluation method(s) consistent with context requirements for the learning experience

* Please note, evaluation of learning objectives is a critical foundation of performance-based learning, and does not refer simply to knowledge tests. If you are unclear about how to evaluate achievement of learning objectives (e.g. Kirkpatrick-Katzell Level 2 evaluation) please refer to the competencies and other resources indicated in the Getting Certified section of the website.

Indicate the specific location(s) in your materials where the design for evaluation of learning objectives is documented (e.g. training blueprint or outline), OR complete the table below:

If you do not already have a document aligning the learning objectives against the corresponding evaluation, compiling them into a table like the following may help you organize your plan and clearly demonstrate mastery to the assessor.

Learning Objective	Activity	Evaluation
Objective #1	Instructional method or activity	Level 2 evaluation method
Objective #2	Instructional method or activity	Level 2 evaluation method

Describe specifically how you ensured the evaluation method is appropriate to the level of learning objectives:

Describe specifically how you ensured the evaluation method is consistent with the context requirements:

3 Create detailed design

Key Output	Assessment Criteria
Detailed outline for learning experience	- Document includes organization need, performance gaps, desired performance outcomes, delivery channel(s), learning objectives, learning strategy, and content and learning activities with estimated duration - Design ensures learning strategy and activities support achievement and evaluation of learning objectives - Design includes learning activities that will engage learners - Delivery channel(s) meet(s) criteria identified - All design choices are based on performance outcomes, learning objectives, resources available, and accepted best practices in performance and learning

Indicate the specific location(s) in your materials where the detailed outline for training is documented:

Describe specifically how you ensured the training design:

- supported achievement and evaluation of learning objectives
- included activities that would engage learners
- ensured the delivery channel(s) were consistent with criteria identified

Describe specifically how you validated the detailed outline for training:

Key Output	Assessment Criteria
Design for supporting transfer of learning	- Design includes realistic activities and tools to support transfer of learning to the workplace, based on the desired performance outcomes - Design includes estimated time and work effort required for learners and coaches - Design uses available technology appropriately

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

3 Create detailed design

Describe specifically how you ensured the design for supporting transfer of learning:

- was realistic and based on the desired performance outcomes
- used technology appropriately to support transfer of learning

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

4 Develop materials

Key Output	Assessment Criteria
Learner materials	• Learner materials conform to plan for designing and developing learning experience • Learner materials support learning objectives • Learner materials follow graphic design and instructional writing principles • Learner materials are appropriate to the learner's work environment • Learner materials are accessible

Indicate the specific location(s) of the Learner materials:

Describe specifically how you ensured the learner materials support the achievement of learning objectives:

Describe specifically how you validated the learner materials:

Key Output	Assessment Criteria
Facilitator materials (if relevant*)	• Facilitator materials conform to plan for designing and developing learning experiences • Facilitator materials indicate how to support achievement of learning objectives • Facilitator materials include how to evaluate learning objectives • Facilitator materials follow graphic design and instructional writing principles • Facilitator materials support preparation and delivery of the learning experience

* For asynchronous designs, such as eLearning, where no facilitator materials are required, simply indicate N/A in the form fields and proceed to the next output.

Indicate the specific location(s) of the facilitator materials:

Describe specifically how you ensured the facilitator materials support the achievement of learning objectives:

4 Develop materials

Indicate the location of one specific example where you provide instructions for the facilitator to evaluate achievement of learning objectives:

Describe specifically how you validated the facilitator materials:

Key Output	Assessment Criteria
Storyboards (if relevant*)	• Storyboards support achievement and evaluation of learning objectives • Storyboards include all content, text, images, activities and interactivity • Storyboards include programming and productions instructions

* For facilitated sessions, where no storyboards are required, simply indicate N/A in the form fields and proceed to the next output.

Indicate the specific location(s) of the storyboards:

Describe specifically how you ensured the storyboards support the achievement and evaluation of learning objectives:

Describe specifically how you validated the storyboards:

Key Output	Assessment Criteria
Web-based Learning (if relevant*)	• Learning experience conforms to detailed outline • Learning materials follow graphic design and instructional writing principles • Learning experience and materials are accessible

4 Develop materials

* *For facilitated sessions, where no web-based learning is required, simply indicate N/A in the form fields and proceed to the next output.*

Indicate the specific location(s) where assessors can access the Web-based Learning (such as apps, videos, e-learning) (memory stick and launch instructions):

Describe specifically how you validated (secured sign-off on) the Web-based learning materials:

4 Develop materials

Key Output	Assessment Criteria
Materials to support transfer of learning	- Materials support transfer of learning to the workplace - Materials clearly identify roles and responsibilities of learner and others (such as mentors, supervisors and peers) - Materials can be used without assistance

Indicate the specific location(s) of the materials to support transfer materials:

Describe specifically how you ensured the materials support the transfer of learning:

Describe specifically how you validated the transfer of learning materials:

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 client 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?