



THE INSTITUTE
FOR PERFORMANCE
AND LEARNING

BUILDING
A MORE
COMPETITIVE
CANADA
TOGETHER

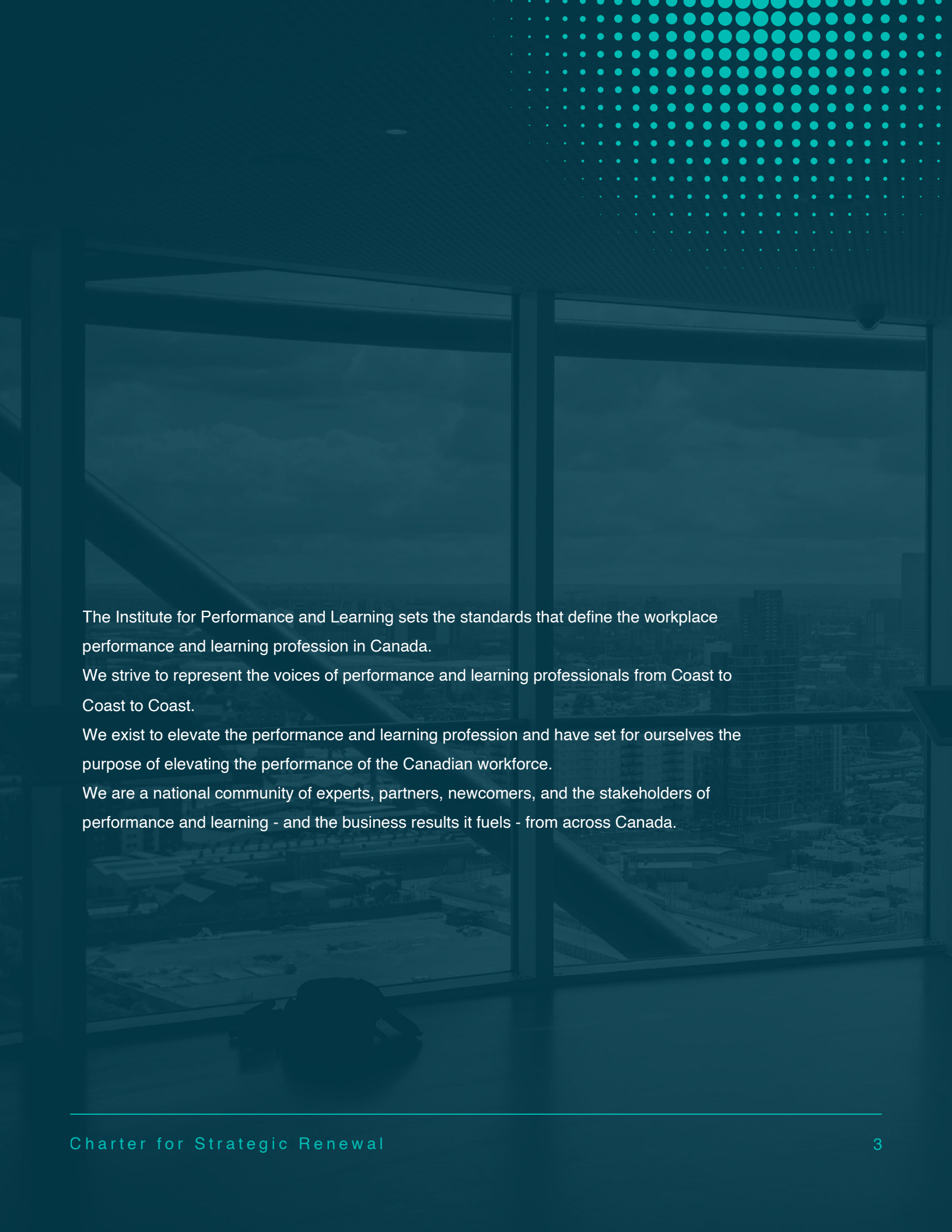
THE DELTA OF TRANSFORMATION

Charting the Strategic Renewal of Canada's
Institute for Performance and Learning

Strategic Plan
2025-2028

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The Institute for Performance and Learning sets the standards that define the workplace performance and learning profession in Canada.

We strive to represent the voices of performance and learning professionals from Coast to Coast to Coast.

We exist to elevate the performance and learning profession and have set for ourselves the purpose of elevating the performance of the Canadian workforce.

We are a national community of experts, partners, newcomers, and the stakeholders of performance and learning - and the business results it fuels - from across Canada.



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EXECUTIVE SUMMARY

The Institute for Performance and Learning (I4PL) stands at a critical inflection point. Amidst a shifting landscape of professional learning, workforce capability, and institutional expectations, the Board has initiated a focused strategic renewal grounded in three defining commitments: **Vision, Voice, and Value**.

This renewal is a recalibration of purpose. It reaffirms the Institute's role as the national standard bearer for performance and learning professionals and realigns the Institute's strategy to ensure long-term relevance, credibility, and sustainability. It reflects a shared understanding: that clarity of direction, professional expertise, and meaningful contribution are essential to serving our members and strengthening the Canadian workforce. The plan is structured around four strategic priorities:

Community and Connection reinforcing engagement with members and partners through a shared sense of trust and purpose.

Capability and Growth raising the standard of professional practice and enabling future-ready development.

Reputation and Reach amplifying I4PL's influence as the credible voice for learning and performance.

Strength and Sustainability ensuring strategic alignment, financial resilience, and institutional durability.

At the heart of this plan is a commitment to singular focus, a credible voice, and the drive of compelling value. These are not aspirations — they are operational commitments that will shape decision-making, investments, and member experience in the years ahead.

As we position the Institute for what comes next, our aim is clear: with **singular focus**, a **credible voice**, and the drive of **compelling value**, we are positioning the Institute to achieve sustainable impact.

Nathan Walsh, CTDP
Chair, Board of Directors



INTRODUCTION

REAFFIRMING OUR PURPOSE AND ROLE AS CANADA'S
AUTHORITY ON ORGANIZATIONAL LEARNING, DEVELOPMENT
AND PERFORMANCE

SETTING THE STANDARD IN CANADA

The Institute for Performance and Learning sets the standards that define the workplace performance and learning profession in Canada through The Competencies for Performance and Learning Professionals® (“The Competencies”) – our body of knowledge and competency framework.

We are the national body responsible for the certification of learning and performance professionals in Canada. The Competencies are the foundation of the Institute’s Certified Training and Development Professional™ (CTDP) designation. Since its establishment as the gold standard for professional excellence in 1976 – the oldest professional designation of its kind in North America.

Today, we continue to foster collaboration, spark innovation, and foster upskilling to enable our profession to make a measurable impact on all workplaces and the Canadian economy as Canada’s only national member association and institute for workplace performance and learning professionals.

OUR ORIGIN

We were founded on the belief that everyone is a lifelong learner. We are committed to improving ourselves and helping others realise their potential. Through learning and experience, Canadians develop the knowledge and skills that enrich their lives, strengthen communities, and enhance the organisations they serve.

Since our beginnings in 1946 as the Ontario Society for Training and Development (OSTD), our national expansion in 2003 as the Canadian Society for Training and Development (CSTD), and our evolution in 2015 into the Institute for Performance and Learning, we have championed the role of learning in boosting productivity, driving innovation, and delivering results. We continue to view workplace learning and development as mission-critical to organisational performance, enabling Canadian enterprises to thrive.

OUR CURRENT CONTEXT

We work in all provinces and industries in Canada—in corporations, government agencies, and nonprofit organizations. Professionals in this field can also assume a variety of roles: administrators, instructors, instructional designers, project managers, curriculum planners, managers, relationship managers or learning consultants, and evaluators.

Despite this diversity of work environments and roles, there are remarkable similarities in competent performance across roles. The Institute’s Competencies framework reflects this universality across the various expressions of the performance and learning profession. This is no small task, as no single professional expression applies all of the Competencies every day, while many others specialize in a subset of them.

INTERNATIONAL CONTRIBUTION

The Institute for Performance and Learning is recognised internationally as a thought leader. To empower micro, small, and medium enterprises (MSMEs) to enhance their capacity, maximize their impact, and improve the cost-effectiveness of business training programs in emerging markets and fragile, conflict-affected situations (FCS), the International Finance Corporation (IFC), part of the World Bank Group, partnered with industry leaders to develop a set of Principles for Learning. These principles aim to establish a foundation for high-impact, inclusive, scalable, and sustainable performance improvement in FCSs.

To activate these principles, the IFC collaborated with the Institute for Performance and Learning to adopt the Institute's Competencies for Performance and Learning Professionals® ("The Competencies") as the basis for the IFC's Guide to Training. Designed for training and development professionals, the IFC's Guide to Training offers a practical framework that supports the creation of contextualised and impactful learning experiences in FCSs, aligned with the Institute for Performance and Learning's Competency framework. In this way, the Institute's Competencies contribute to setting the standards for excellence far beyond the Canadian context.

OUR ROLE

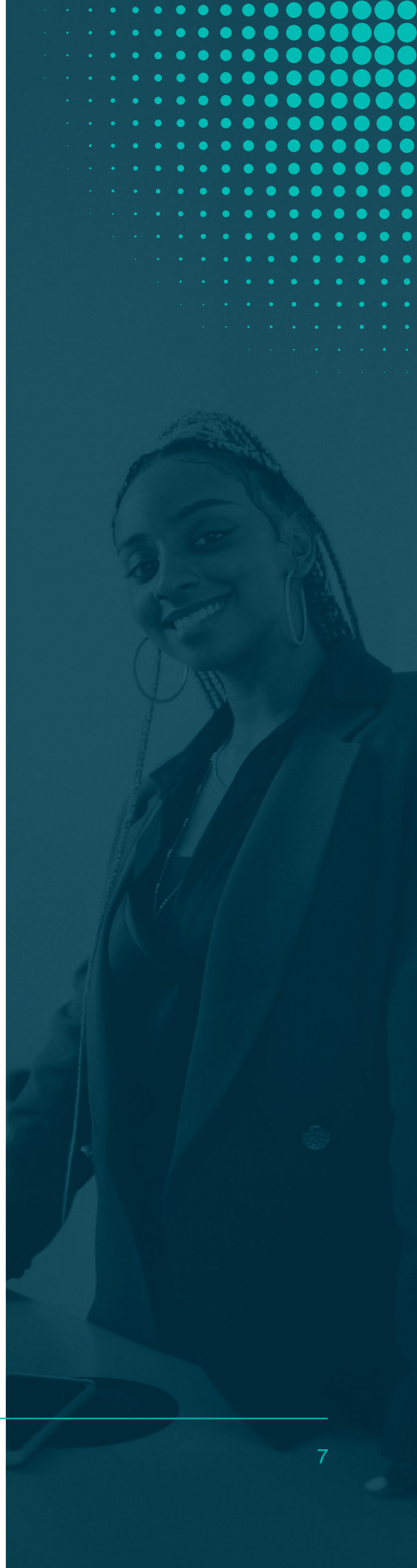
We exist to elevate the performance and learning profession by setting the standard for excellence in professional practice through our Competencies framework, Code of Ethical Conduct, DICE commitment, and sought-after professional designations.

As a Member-Driven Association, we support the success of professional members of the Institute through:

- The rigorous recognition of the Certified Training and Development Professional™ (CTDP) process through a comprehensive assessment of the level of a professional's existing knowledge, skills and competency against our Competencies framework.
- Providing educational and professional development opportunities to elevate professional practice, advance excellence in the field, deliver quantitative results in the workplace, and enrich careers.
- Contributing to developing our local chapters into collaborative, professional communities and networks of deep expertise.

As an Institute, we serve as the governing body of the self-regulated performance and learning profession in Canada, advancing, advocating for, and evolving standards of excellence through a commitment to research and evidence-based practice to:

- Set the standards for Learning and Performance Professionals in Canada. To this end, the Institute's CTDP designation and certification program has been developed in accordance with standards set by the International Organisations for Standardization (ISO).
- Champion our profession and advocate for investment in continuous workplace learning and development, fueling business results.
- Disseminate thought leadership and research studies that provide a compelling point of view to shape the practice of learning and workplace performance.





OUR STRATEGIC PLAN

DATA SOURCES

Our Strategic Plan is grounded in insight to ensure **Relevance**, **Rigour**, and **Responsiveness**, from distinct lenses on the inflection point we're at today and where we need to go tomorrow:



ENVIRONMENTAL CONDITIONS

INSIGHTS drawn from macroeconomic, political, technological, and demographic trends shaped a clear view of external forces influencing the profession's future.



ORGANISATION REFLECTION

INTERNAL analysis clarified core strengths to build on and critical points where we need to pivot, enabling us to align key capabilities to address material risks.



MEMBER VOICE

CONSULTATION with members ensured our strategy reflects practitioner needs, professional challenges, and opportunities identified from across the country



MARKET LANDSCAPE

REVIEW of competitor positioning, industry benchmarks, and best practices shaped priorities and supported differentiating the Institute's role in the Canadian economy.

STRATEGIC PILLARS

Our Strategic Plan is focused on the renewal of the Institute's **Vision**, **Voice**, and **Value**. This focus is expressed through four strategic priorities:



COMMUNITY AND CONNECTION

ENHANCE member value and engagement through constructive partnerships and meaningful opportunities to connect from Coast to Coast to Coast.



CAPABILITY AND GROWTH

ENABLE the continued professional development of future-ready professionals through partnerships, programs and certification.



REPUTATION AND REACH

ELEVATE the Institute's profile as a thought leader and authoritative voice on organisational performance and learning through research and best practice.



STRENGTH AND SUSTAINABILITY

EXECUTE on operational and governance excellence, shifting to a growth orientation, and reallocating resources to drive the sustainable growth of the Institute.

COMMUNITY & CONNECTION

The Community and Connection strategic pillar aims to strengthen engagement across the professional lifecycle by cultivating inclusive networks, meaningful partnerships, and a vibrant member community from coast to coast to coast.

GROWTH ENGINES	INITIATIVE	GOAL
Engagement across the Professional Lifecycle Network Expansion & Enrichment Enhanced Member Value Proposition	Renewed program recognition and accreditation model	Expand integration of the Institute's Competency Framework into Higher Education programs
	Expanded membership categories and groups Introduction of Regional Enablement Team	Enhance individual member value and local chapter support
	Establish Trusted partner program - tiered model	Enrich partnership opportunities and clarity through formal endorsement

ACTIVITIES	METRICS
• Re-engage partner institutions • Develop accreditation model • Develop licensed courses, exams and resources	• Number of accredited program renewals • Number of new program accreditations • Number of student CTDTP Candidates • Number of student CTDTP Candidates achieving certification • Partner satisfaction ratings

CAPABILITY & GROWTH

The Capability and Growth strategic pillar aims to elevate professional excellence through certification, learning programs, thought leadership; embed the Institute's Competencies as the National Standard of Canada.

GROWTH ENGINES	INITIATIVE	GOAL
Competency & Certification Standardisation	Embed Competencies, CTDP in key industries/ sectors and organisational partners	Position CTDP and Competencies as National Standards of Canada across strategic sectors.
Enhance Professional Excellence	Renew certification and assessment model	Streamline CTDP assessment model to drive adoption without compromising rigour
Professional Impact & Advancement	Strategic Partner Development and Marketing Campaign	Increase awareness and adoption of the CTDP designation and the Institute across Canada

ACTIVITIES	METRICS
• Build sector-specific CTDP value proposition • Launch direct outreach to strategic partners • Support employers embedding Competencies in internal L&D	• 5% certification growth rate; candidate satisfaction (NPS) • Brand awareness and symposium attendance • Corporate member increase (5% YoY) • Competency adoption rate; partner satisfaction (NPS) • Corporate membership revenue generated

REPUTATION & REACH

The Reputation and Reach strategic pillar aims to establish the Institute as a Standards Development Organisation (SDO), expand thought leadership and amplify our presence through research, standard-setting and advocacy.

GROWTH ENGINES	INITIATIVE	GOAL
Established Standards Development Organisation Thought Leadership and Research Strategic Partnerships	Standards Council of Canada accreditation; accreditation as a Certifier of Persons	Achieve accreditation as a Standards Development Organisation and certifier of persons
	Renew research focus, quality and regularity of research outputs	Position the Institute as an industry thought leader in workplace learning, and performance
	Expand reach through formalising relationships with peer national and international organisations	Strengthen influence and reach through strategic national and international partnerships

ACTIVITIES	METRICS
• Align and complete ISO 17024 and SCC accreditation • Produce monthly research briefs, quarterly white papers, annual industry reports • Formalise MOUs/MRAs	• SCC accreditation achieved (Y.N); successful audit with no major findings • Member/public engagement with research products • Increase in external/policy citations of Institute research • Number of formal strategic partner MOUs/MRAs signed

STRENGTH & SUSTAINABILITY

The Capability and Growth strategic pillar aims to ensure long-term impact through operational alignment, financial resilience, and growth-oriented strategy—to deliver greater value to members, the profession and the public.

GROWTH ENGINES	INITIATIVE	GOAL
Diversify Non-Dues Revenue Streams	Expand revenue generation model, with renewed focus on industry relations, marketing, and fundraising	Diversify revenue streams and reduce dependency on dues-based income generation
Enhance Product & Service Value	Develop scalable, proprietary programs, courses, resources etc; renew accreditation model	Increase value to members and partners through innovative product offerings
Renew Governance & Operational Model; Enhance Operational Excellence	Renew operational and governance model; identify key capabilities and qualifications	Optimise governance, financial, and operating models to ensure long-term sustainability

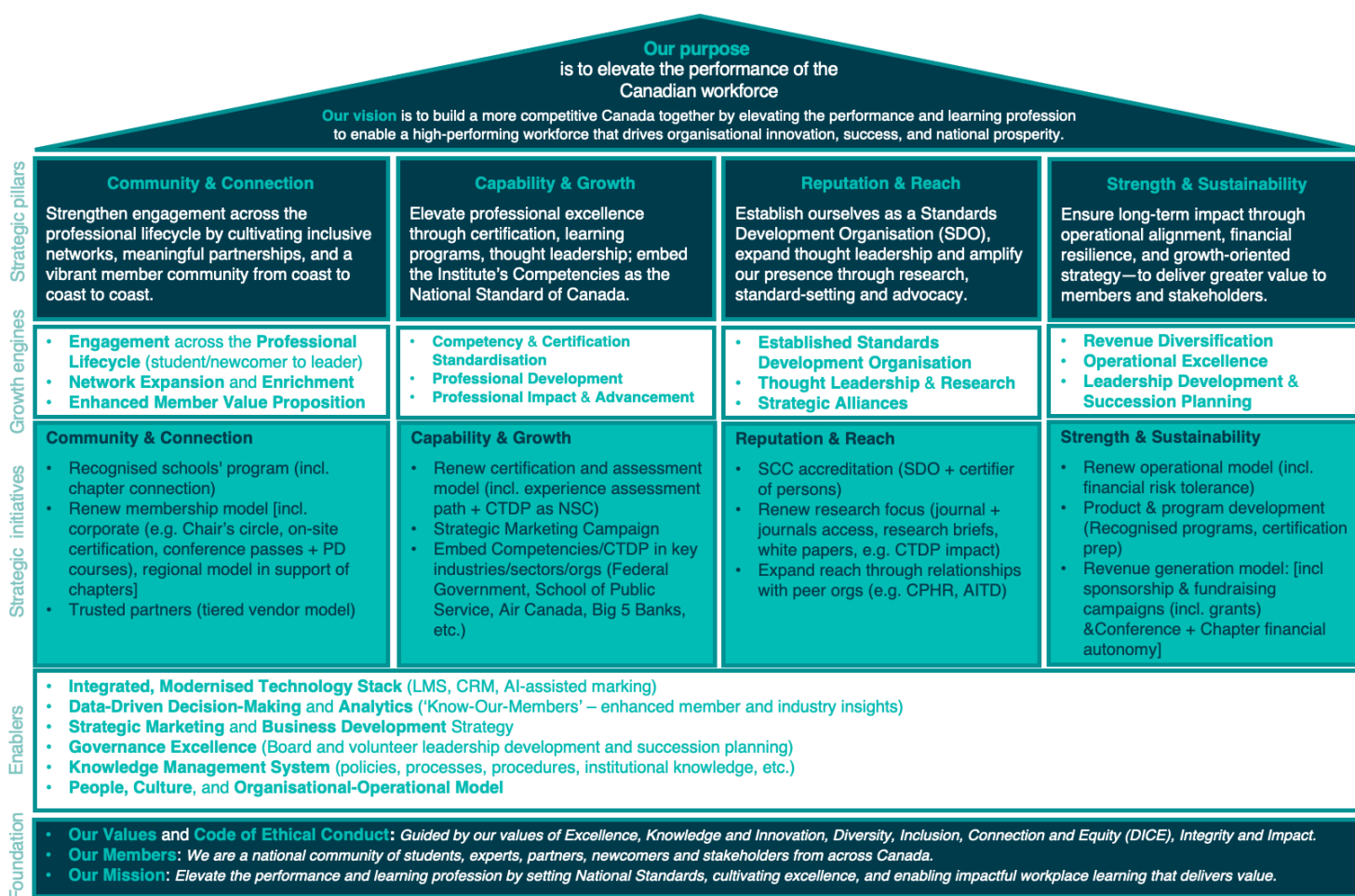
ACTIVITIES	METRICS
- Align fractional workforce to operational requirements; update financial risk tolerance - Launch multi-year partner model; renew tiered accreditation model - Program/course and resource development RFP (Institute-owned IP)	85% partner renewal; total % of revenue from non-dues sources; total number/\$ of grants secured/funds-raised - Program/product total revenue generated; NPS; New tech stack by 2027 - Number of partnerships - Trend in operating surplus by 2027; Conference and regional financial autonomy achieved by 2027

SUMMARY | Bringing It All Together

Our strategic plan charts a clear course for renewal and growth, grounded in the Institute's purpose, mission, and values. It organises our efforts around four strategic pillars, each representing a critical area of focus necessary to advance the profession and strengthen the Institute's impact.

To inform the development and guide the direction of this plan, we engaged in a rigorous six-month strategic planning and member listening process. The result is founded on market research and incorporates the voice of professionals from across Canada.

Each pillar is supported by three key strategic initiatives—focusing work to bring each pillar to life and translate broad goals into actionable priorities. Together, they respond to the needs of members, the evolving demands of workplace learning, development, and performance and the changing expectations of employers and employees.



We progress initiatives forward by leveraging key enablers—capitalising on core people, process, and technology resources. These enablers cut across the organisation and provide the capacity, insight, and resilience needed to execute our strategy effectively.

This charter for the strategic renewal of our Institute reflects today's imperative to build a more competitive Canada together, and the pivotal role our professional community is called upon to play in close collaboration with the workplaces of all sizes that we serve. As we move forward, this plan will guide our decisions, focus our resources, and support the delivery of measurable results as we elevate the performance of the Canadian workforce.



COMMITMENTS

REAFFIRMING OUR VISION, MISSION AND VALUES AS
CANADA'S AUTHORITY ON ORGANIZATIONAL LEARNING,
DEVELOPMENT AND PERFORMANCE

OUR VISION

Our work will continue to be guided by our vision to build a more competitive Canada together by elevating the performance and learning profession to enable a high-performing workforce that drives organisational innovation, success, and national prosperity.

OUR MISSION

We remained focussed on our mission to strengthen the performance and learning profession by setting the National Standards for Canada, cultivating professional excellence, and enabling impactful workplace learning that delivers measurable value to individuals, organisations, and the Canadian economy.

We do this by:

- **Certifying professionals** through our rigorous Competency framework and CTDTP designation;
- **Supporting lifelong professional growth** with accessible, relevant, and future-focused development opportunities;
- **Advancing research-informed practice** and advocating for continuous workplace learning;
- **Connecting a vibrant, coast-to-coast community** of professionals, partners, and thought leaders.
-

OUR VALUES

We seek to remain grounded in, and animated by, our values as we pursue our vision and realise our mission. Our five (5) core values are:

Knowledge and Innovation. We are committed to advancing the field through generating, applying, and responsibly disseminating knowledge. Grounded in research and reflective practice, we promote evidence-informed learning that improves performance, shapes practice and delivers value across the Canadian workforce.

We respond to a rapidly changing world with agility, creativity, and foresight. By embracing emerging trends and technologies, we help organisations and professionals shape the future of workplace performance and learning.

Diversity, Inclusion, Connection and Equity (DICE). We embrace the diverse backgrounds, experiences, and perspectives that strengthen our profession. We work to remove barriers, amplify underrepresented voices, and create environments where all individuals are respected, valued, and empowered to thrive.

We cultivate trust and shared purpose through meaningful relationships across sectors, geographies, and career stages. Our national community is a network of practitioners, thought leaders, and allies working together to drive positive change.

Integrity. We act with transparency, honesty, and responsibility to our members, our profession, and the public. Our commitments—to standards, ethics, and outcomes—guide how we lead, learn, and serve.

Impact. We believe that learning is a catalyst for human growth and organisational performance. We place people at the heart of development—supporting dignity, purpose, and potential across all roles, career stages, and communities.

Excellence. We uphold the highest standards of competence and conduct in workplace learning and performance. Through evidence-informed practice, continuous development, and credentialed recognition, we elevate our profession and its measurable impact.

OUR SHARED BELIEFS

We believe in the efficacy of learning to enrich the lives of working Canadians, fuel the competitive advantage of Canadian business and contribute to making the world a better place.

We believe that learning can bring out the best in each of us, create opportunities and possibilities, promote collaboration, nurture relationships and understanding, foster inclusion, activate potential, and build community.

We believe that organisational learning and development promote the holistic growth of the human person in the workplace, spark innovation, and drive enterprise performance and our economy. Human development is not only instrumental to economic prosperity – it is foundational to it.

In sum, we believe learning to be critical to the health, productivity, performance, and prosperity of Canadians and Canada.

OUR PERSPECTIVE ON THE FUTURE

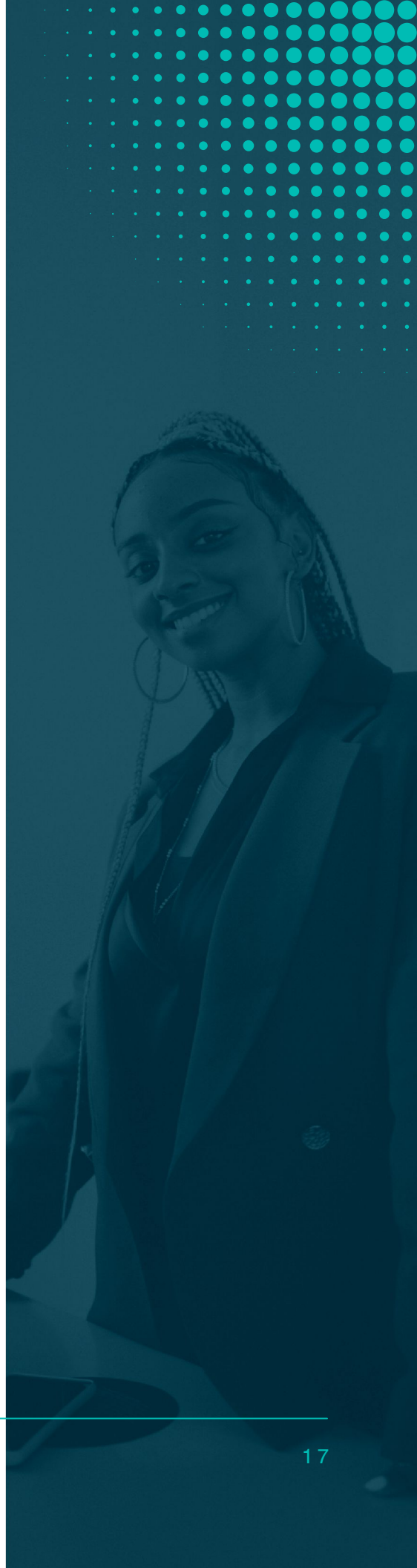
Where do we believe our world is going? We are moving faster than ever before in our collective history. Our world is smaller and more interconnected and interdependent than at any other time. The influence and disruption of emerging and evolving technology is profoundly affecting our society and the way we work. The more connected we became, the more frequently we experienced change. Today, change has become the norm.

Economic challenges, evolving business models, geopolitical tensions, conflicts, the effects of climate change, and the eroding trust in long-standing human institutions have led to the destabilization of the present and an uncertain future.

We see around us the impacts these forces are having on the health of the Canadian economy and the growing fear of a global recession. And yet Canadians have united, perhaps as never before, to transcend barriers, reach out and span the gap, creating new connections, opportunities, ways forward, and deepening relationships from coast to coast to coast and beyond.

Investment in human performance continues to be crucial to building a more competitive Canada and mitigating the drags on economic growth caused in part by falling productivity and stagnating innovation. In this increasingly uneasy and competitive world, we see a key differentiator among national economies in the diversity, resourcefulness, learning, upskilling, reskilling, and holistic development of citizens.

At this inflection point in history, we strongly believe that, given the forces and circumstances outlined above, that the Institute for Performance and Learning and workplace training and development professionals, have a renewed and critical role to play in enabling organisational performance through the application of evidence-based practice, fueling results, and thereby contributing to fostering the economic growth of Canadian enterprise - [Building a More Competitive Canada Together](#).





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