Certified Performance Technologist (CPT): Setting the Standard

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Objectives

As a result of this program, you will:

- Know why and how the CPT certification was created and how it differs from other certifications in related fields.
- Get an overview of the standards on which the CPT is based.
- Know the steps required to achieve the CPT
- Know where to get the application and examples of good applications
(H)PI & HPT

- Performance is work that leads to worthy results in ways that are:
  - Efficiently
  - Effectively
  - Ethically

- PI – Performance Improvement is the Goal

- HPT – Human Performance Technology is the application of a systematic approach to improve human and organizational performance
What Distinguishes HPT

1. Looks at the work, worker, & workplace (people, process, environment)
2. Handles ill-structured problems
3. Starts with the end in mind – the goals & desired result
4. Gets measures early – baseline, success, & leading indicators – is data driven
5. Is efficient – leverages data & research
6. Diagnoses before prescribing
7. Engages & collaborates
8. Designs based on feasibility & sustainability
9. Manages the implementation through oversight & measuring at key points
10. Communicates – is explicit about what was done & why
What It Is The CPT?

A **credential** offered by ISPI that recognizes consistent, worthy performance achieved through a systematic process

Or

Human Performance Technology (HPT)
What It Isn’t!

• A certificate of completion of a training or education program.

• ISPI does give certificates for completing their Institutes, however they are not required to achieve the certification.
Who Is It For?

Experienced professionals engaged in:

- performance improvement,
- training and development,
- organizational development,
- human resource development, and
- other fields that apply systematic processes to improve performance.
What’s Required?

- Three years of experience in performance improvement efforts.
- Demonstrated proficiency in the 10 Standards of Performance Technology:
  - Proficiency in all ten Standards three times
  - Using a minimum of 3 projects and a maximum of 7.
- Commitment to a code of ethics.
- Commitment to recertification every three years.
What Sets it Apart?

- Both proficiency & competency based
- Standards developed by customers & consumers of our services
- First to have a Code of Ethics
- Valued by employers
- Being adopted internationally
  - 26 countries
Certification = Assessment

• Assess Knowledge
  – Terms, rules, concepts, etc

• Assess Skills:
  – Knowledge of procedures or the application of rules through case studies

• Assess Performance
  – Application of procedures/rules in a controlled environment

• Assess Proficiency (fluency)
  – Measures application in non-controlled or real world environment

ISPI
What’s In It For Organizations?

- Use the standards for selection and development – provide a benchmark
- Get a Code of Ethics to guide behavior and decisions
- Provides criteria for contracting for products and services
- Can rapidly deploy teams with greater confidence
- Distinguishes them from their competitors
- Increases the odds they will get people who can produce meaningful results
What’s In It For You?

- Stay competitive.
- Be recognized for your work.
- Distinguish yourself to potential employers and clients.
- Join others throughout the world who have received the CPT designation.
A Little History

- CPT launched in April of 2002
- Today more than 1100 CPT’s
- In 26 countries
- 21 were chartered CPT’s –
  - Received the designation because of their proven work through awards and contributions to the field
How It Got Started

Members and Industry asked for:
Standards with which to select and develop performance improvement professionals and for a designation that identifies those who have been successful in producing measurable results.
Why ISPI?

ISPI’s mission is to:

• develop and recognize the proficiency of its members and

• advocate the use of human performance technology (HPT)
Who Developed the Standards?

A team of over 30 Performance Improvement Practitioners known as the “Kitchen Cabinet”:

- Managers of Performance & Learning
- Consulting Firms
- Independent and Internal Practitioners
- Academics
- With the Leadership of Dr. Judith Hale
How Were The Standards Validated?

• Practice analysis by reviewing articles in professional journals where practitioners described what they did. Done by graduate students at Indiana University
  – Mark Lauer & Erika Gilmore
  – Under the guidance of James Pershing.

• Review by independent experts.

• Available for public review and comment on ISPI’s and ASTD’s websites
ISPI’s Standards

Principles:
1. Focus on results or outcomes.
2. Take a systems view or think systematically.
3. Add value by remembering the organizational purpose.
4. Partner & work collaboratively with others.

Systematic Approach:
5. Identify Needs & Performance gap
6. Determine the cause
7. Design the solution
8. Develop the solution
9. Implement the solution
10. Evaluate the solution
Principle 1

1. Focus on Outcomes/Results

*(start with the end in mind)*
Means v Ends

• Means – vehicles or methods used to change, codify, or standardize:
  – Behaviors
  – Capabilities
  – Knowledge
  – Relationships
  – Structure
  – How work gets done
  – What we do, when, and how

• Ends – consequences of changing, codifying, or standardizing measured in:
  – Satisfaction
  – Financial health
  – Productivity
  – Compliance
  – Innovation
  – Other
# Examples of Means

<table>
<thead>
<tr>
<th>Workplace Level</th>
<th>Work Level</th>
<th>Worker Level</th>
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</thead>
<tbody>
<tr>
<td>Reorganize Plan</td>
<td>Re-design jobs</td>
<td>Add performance criteria</td>
</tr>
<tr>
<td>Introduce initiatives</td>
<td>Automate Add technology Wikis, blogs, web-sites</td>
<td>Develop feedback systems</td>
</tr>
<tr>
<td>Six sigma Quality</td>
<td>Go to teams Impose standards</td>
<td>Develop/Train Certify</td>
</tr>
<tr>
<td>Add regulations Make policies</td>
<td>Re-engineer processes</td>
<td>Use incentives</td>
</tr>
<tr>
<td>Merge Outsource</td>
<td></td>
<td>Talent management</td>
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<td></td>
<td></td>
<td>Competency studies</td>
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</tbody>
</table>
End/Goal/Results = Measures

- Knowing results helps identify 3 types of information that are measures:

1. What information will be accepted as evidence of success (goal)
2. What information is being used today as a basis for the decision to act – (the baseline or current state)
3. What information can be used to judge that the solution is working – (leading indicators - interim behaviors or results that predict success & failure)
Principle 2

1. Focus on Outcomes/Results

2. Think systemically

(\textit{take a systems point of view})

(\textit{consider the context or constraints within which work must occur})
Principle 3

1. Outcomes/Results
2. Think systemically
3. Add value

(focus on the goal)
Principle 4

1. Outcomes/Results
2. Think systemically
3. Add value
4. Establish partnerships

*(work collaboratively)*
Principle 5

1. Outcomes/Results
2. Think systemically
3. Add value
4. Establish partnerships

5. Follow a systematic process
   (Discover, validate, design, validate, implement, validate)
ISPI’s Standards

**Principles:**
1. Focus on results or outcomes.
2. Take a systems view or think systematically.
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4. Partner & work collaboratively with others.

**Systematic Approach:**
5. Identify Needs & Performance gap
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Systematic Approach

5. Performance Analysis - The Need

- Process of identifying needs or opportunities
- Process to identify gaps in performance - the difference between the desired and the actual state
Systematic Approach

6. Cause Analysis - the why and how

• Process of determining environmental causes of the gap - a deficiency, unmet need, or not actualized opportunity

• Process of identifying any characteristics of the workforce that causes the gap
Most frequent causes of performance problems fall under the auspices of the work & workplace (internal environment):

- Information
- Goals
- Policies
- Org structure
- Job & process design
- Authority/control
- Selection practices
- Compensation
- Feedback
- Reinforcement
- Meaningful work
- Career opportunities
- Accountability
- Group norms

Efficiency – Leverage Research

Next most frequent cause of performance problems falls under the auspices of the people:

- Capability
  - Knowledge
  - Skills
- Capacity
- Motivation

Solutions are:
- Training/coaching
- Job aids, EPSS
- Job/tool redesign
- Emotional supports
- Hiring criteria

Efficiency – Leverage Research

Remember 3:4

• Causes come in 3’s
• Solutions come in 4’s
Systematic Approach

7. Design - the architecture of and plan for the solution. Describes how the solution will:

- Accomplish the goal
- Be experienced by the user
- Be developed
- Be implemented
- Be evaluated
- Written at sufficient level of detail to facilitate development and plans for implementation and evaluation
- May include feasibility tests of solution elements
Systematic Approach

8. Development – the how:

- The solution is actualized
- You did formative or in process evaluation to assure:
  - Usability
  - Workability
Systematic Approach

9. Implementation - the why and how
   - The solution is introduced
   - Adoption is supported
   - Adoption and usage is tracked
   - The change process is done
Systematic Approach

10. Evaluation - the why and how

- You measured the impact of the solution
- You measured the degree the solution satisfied the need, eliminated or reduced the gap
Process Overview

1. Assess your readiness

2. Prepare your application
   - Identify 3 to 7 projects that cover the 10 standards at least 3 times.
   - Note: 1st three projects must satisfy 1st four standards plus three more standards. Remaining projects can fill in the blanks.
   - Describe your work
   - Get your attestations

3. Sign the code of ethics

4. Submit your application
Example: First 3 Projects

- Must satisfy standards 1-4 plus 3 others
  - Project 1: Standards 1, 2, 3, 4, and 5, 6, 7, 8
  - Project 2: Standards 1, 2, 3, 4, and 5, 6, 7, 10
  - Project 3: Standards 1, 2, 3, 4 and 7, 8, 9, 10

- Have someone attest to each project
Example: Remaining Projects

- Must satisfy the remaining Standards
  - Project 4: Standard 5, 6, 9
  - Project 5: Standards 8, 10
  - Project 6: Standard 9

- Have someone attest to each project
Process Continued

5. Application sent to 2 reviewers (blind review)
   – If a split vote goes to a 3 reviewer (blind review)
   – If you do not satisfy the standards you are given feedback and 90 days confirm your decision to resubmit
   – You have 24 months to resubmit

6. When certified, given a press release, logo and instructions on how to announce the designation
Re-certification Requirements

7. Get recertified every 3 years
   – Continued practice and proficiency
     • Done through self-attestation.
   – 40 re-certification points every three years
     • Attend conferences, institutes, for-credit courses, non-credit courses, training related to one or more of the Standards
     • Up to 15 hours from teaching, research, publishing and/or volunteering within a professional group.
   – Recommit to the Code of Ethics
   – Pay a recertification fee
How is the credential managed?

• Certification Governance Committee:
  – Nine member committee
  – Three year revolving terms
  – Mixed representation of employer, government, practitioners, academics
  – Chair appointed by the ISPI Board of Directors

• ISPI Director of Certification (Staff Position)
## Summary

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<tr>
<th>REQUIREMENTS</th>
<th>CERTIFICATION</th>
<th>RE-CERTIFICATION</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Minimum Years of Experience</td>
<td>3 years</td>
<td>Not applicable</td>
</tr>
<tr>
<td>2. Accept the Code of Ethics</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>3. Continuing Education and Professional Development</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>4. Documentation</td>
<td>Document experience and work done on multiple projects, and how the work meets the Standards</td>
<td>List your continued professional development, contributions to the field and volunteer work</td>
</tr>
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<td>5. Attestation by Client or Supervisor</td>
<td>Attest that the projects were satisfactorily done by you and the documentation is accurate</td>
<td>Self-attest to your continued work in the field and adherence to the Code of Ethics</td>
</tr>
<tr>
<td>6. Review</td>
<td>To ensure that each Standard was met three times</td>
<td>To ensure completeness and factual accuracy</td>
</tr>
<tr>
<td>7. Pay a fee</td>
<td>ISPI, Non-member rate:</td>
<td>$995 $1195</td>
</tr>
</tbody>
</table>
Summary

1. Study the standards.
2. Determine your readiness with the self-assessment form.
3. Identify those areas you need to develop.
4. Identify developmental resources.
5. Commit to the Code of Ethics.
6. Identify clients and projects to submit.
7. Prepare the clients.
8. Describe your work.
9. Submit your descriptions to the clients for attestation.
10. Submit your application.
Q&A

• What questions do you have about:
  – The process overall?
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  – Mauriecoleman@ispi.org
  – Certification@ispi.org
  – www.ispi.org