

Certified Performance Technologist (CPT): Setting the Standard



**International Society for
Performance Improvement**

WHERE KNOWLEDGE
BECOMES KNOW-HOW

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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



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

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

(take a systems point of view)

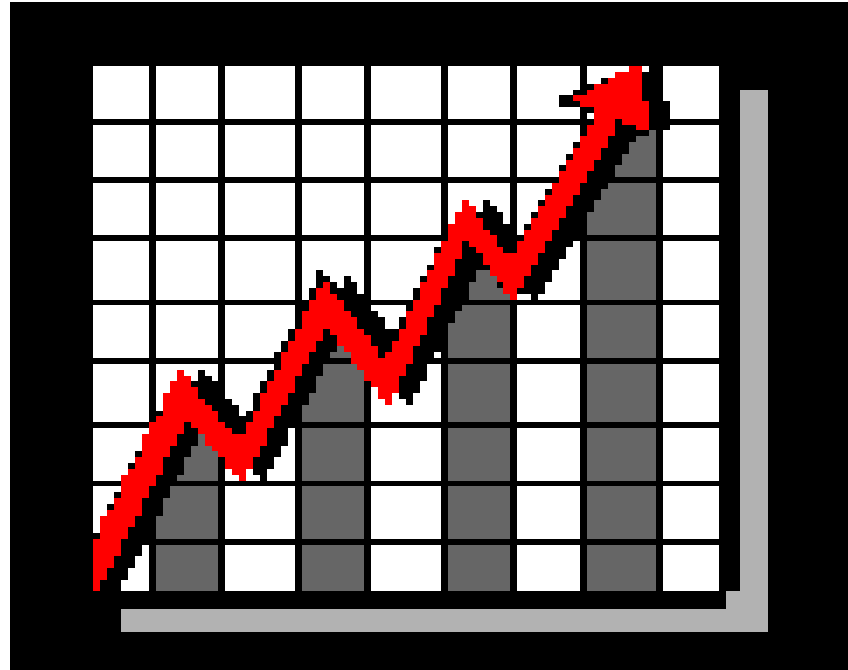
*(consider the context or constraints
within which work must occur)*

Principle 3

1. Outcomes/Results
2. Think systemically

3. Add value

(focus on the goal)



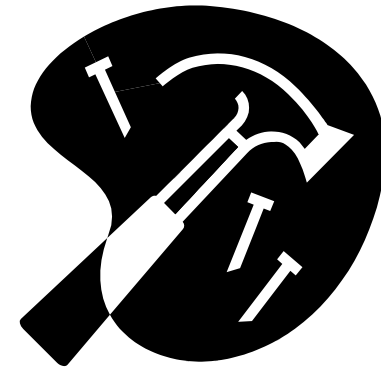
Principle 4

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)

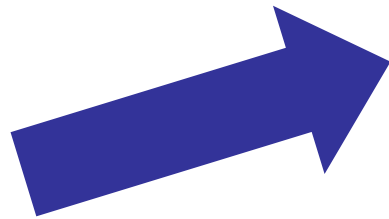


ISPI's Standards



Principles:

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Systematic Approach:

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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

Efficiency – Leverage Research



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

Wile, D. "Why Doers Do", Performance Improvement, 35 (1), 30-35 and Gilmore, E. Dissertation 4/08

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 the 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



REQUIREMENTS	CERTIFICATION	RE-CERTIFICATION
1. Minimum Years of Experience	3 years	Not applicable
2. Accept the Code of Ethics	Yes	Yes
3. Continuing Education and Professional Development	No	Yes
4. Documentation	Document experience and work done on multiple projects, and how the work meets the Standards	List your continued professional development, contributions to the field and volunteer work

Summary



REQUIREMENTS	CERTIFICATION	RE-CERTIFICATION
5. Attestation by Client or Supervisor	Attest that the projects were satisfactorily done by you and the documentation is accurate	Self-attest to your continued work in the field and adherence to the Code of Ethics
6. Review	To ensure that each Standard was met three times	To ensure completeness and factual accuracy
7. Pay a fee ISPI, Non-member rate:	\$995 \$1195	\$175 \$350

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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