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  2. CTDP – Certified Training and Development Professional™ ....................................................... 3
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    1.1 Membership & Certification ................................................................................................... 20
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SECTION A: Introduction

1. Setting Industry Standards

Setting standards for over 30 years, CSTD is the professional association focused on training, learning and performance in the workplace. Articulating and validating the standards through Competencies for Training and Development Professionals®, CSTD has been helping individuals and organizations from all industries including private industry, military, government and academia to improve their performance and organizational results.

1.1 Using the Candidate Manual

The purpose of this manual is to guide candidates through the certification process.

It is assumed you have already decided which certification best suits you – CTDP™. If you still have questions and require further information, refer to cstd.ca/certification or email us at certification@cstd.ca

2. CTDP – Certified Training and Development Professional™

2.1 CTDP Designation

CTDP™ based on the industry standard practice: Competencies for Training and Development Professionals™. CSTD 2010. The publication is a key resource to the training and development community and has identified 5 Core Competencies for the profession:

- Assessing performance needs
- Designing training
- Facilitating training
- Supporting transfer of learning
- Evaluating training
## 3. Glossary of Terms

<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>CSTD</strong></td>
<td>The Canadian Society for Training and Development</td>
</tr>
<tr>
<td><strong>CTP</strong></td>
<td>Certified Training Practitioner ™</td>
</tr>
<tr>
<td><strong>CTDP</strong></td>
<td>Certified Training and Development Professional ™</td>
</tr>
<tr>
<td><strong>Practice Exam</strong></td>
<td>25 multiple choice questions spanning all five sections of Competencies (below) with a focus on the Facilitating Training section.</td>
</tr>
<tr>
<td><strong>CTP Knowledge Exam™</strong></td>
<td>50 multiple choice questions focussing on the Facilitating Training section of Competencies (below), to be completed by CTP™ certification candidates.</td>
</tr>
<tr>
<td><strong>CTDP™ Knowledge Exam</strong></td>
<td>150 multiple choice questions focussing on all five sections of Competencies (below), to be completed by CTDP™ certification candidates.</td>
</tr>
</tbody>
</table>
| **Competencies** | The five competency categories are:  
- Assessing performance needs  
- Designing training  
- Facilitating training  
- Supporting the transfer of learning  
- Evaluating training |
| **TCA** | Training Competency Architecture © |
| **Knowledge and Skill Assessment** | The process to CSTD certification in which a candidate passes a knowledge exam and submits a skill demonstration to be assessed by a third party assessor. |
| **Portfolio-Based Assessment** | The process to CSTD certification in which a candidate provides validation of work experience, knowledge, and prior achievements in the field via a portfolio. |
| **Recognized Programs** | Canadian post-secondary programs of study, offered at public institutions, focused on the field of adult education that address one or more of the competency areas as outlined in the Competencies for Training and Development Professionals ™. |
| **Facilitator** | For CSTD purposes, a facilitator, also known as an instructor or trainer, is defined as someone whose job responsibility is instructing workshops or courses that provide education and training in one of these environments: workplace (corporation, government, non-profit), university or college, continuing education program or community education program (such as a jobs center). |
| **Full time Facilitator** | A full-time facilitator is defined as someone whose primary job responsibility is as a facilitator at least 51 percent of the time. In practical terms, that means a full-time facilitator instructs an average of 21 hours a week (1092 hours per year). |
| **Part time Facilitator** | A part-time facilitator is defined as someone whose occasional role or job responsibility is as a facilitator less than 50 percent of the time (1091 hours per year or fewer). |
SECTION B: Certification Process

1. Prepare for your CTDP Exam

As part of the certification process, there is one exam: CTDP Knowledge Exam™ and there are two Practice Exams. Use the following tools listed below to prepare for your exam.

Exam Details

The exams cover concepts, definitions and practices related to all five competency categories as outlined in Competencies for Training and Development Professionals®. Every candidate must write and pass their exam prior to moving on to the Skill Demonstration portion.

Important note: should the candidate not be successful in their first attempt at the exam, they have the opportunity to take the exam again at no additional cost. Should a third attempt be needed, there is a fee. Please consult the fee guide.

Exam Format

- 150 Online multiple choice questions
- A three hour time limit
- A passing mark of 70 per cent (one free rewrite permitted)

Exam Weighting

The 150 multiple choice questions are broken down as follows:

- Assessing Performance Needs 18%
- Designing Training 34%
- Facilitating Training 34%
- Supporting Transfer of Learning 6%
- Evaluation of Training 8%

1.1 Read Competencies for Training and Development Professionals®

Read the Competencies for Training and Development Professionals®. This is the key reference for preparing for the exam and for preparing for the skill demonstration. Each candidate is sent a copy of Competencies™ upon registration.

1.2 Self-Assessment Tool

Every candidate has access to CSTD’s Self Assessment Tool; this is the online companion to the Competencies. It was created for members to assess their proficiency in the training and development industry.

The Self-Assessment tool will then help every Candidate:
- Reflect on their current skill and knowledge
- Identify any proficiency gaps
- Prepare for the exam, such as: identifying key books to review

Available on the CSTD website, please visit www.cstd.ca/selfassessment

### 1.3 Identify Gaps in Knowledge

As you review the Competencies text, make note of terms that you can’t define and competencies that you can’t explain. Look at the Key Outputs and Quality Criteria and note any that aren’t clear to you.

Ask yourself … *Do I know this? Do I do this?*

*For example: The category: *Facilitating Training* contains 5 competencies that are further broken down into 2nd and 3rd levels of detail:*

<table>
<thead>
<tr>
<th>1. Prepare to Facilitate</th>
</tr>
</thead>
<tbody>
<tr>
<td>1a. Become familiar with training content and design</td>
</tr>
<tr>
<td>- Assess training design and materials for flow, clarity and timing</td>
</tr>
<tr>
<td>- Etc.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>2. Create Learning Environment</th>
</tr>
</thead>
<tbody>
<tr>
<td>2a. Establish physical or virtual learning environment</td>
</tr>
<tr>
<td>- Confirm all logistics prior to the start of training (such as technology and software working as expected, materials and refreshments delivered)</td>
</tr>
<tr>
<td>- Etc.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>3. Engage Learners</th>
</tr>
</thead>
<tbody>
<tr>
<td>3a. Deliver content and instructions</td>
</tr>
<tr>
<td>- Use a variety of instructional techniques to provide content (such as demonstration or group discussion)</td>
</tr>
<tr>
<td>- Etc.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>4. Foster Learning</th>
</tr>
</thead>
<tbody>
<tr>
<td>4a. Demonstrate subject matter expertise</td>
</tr>
<tr>
<td>- Establish credibility by providing your credentials. Including related experience</td>
</tr>
<tr>
<td>- Etc.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>5. Assess Learning</th>
</tr>
</thead>
<tbody>
<tr>
<td>5a. Confirm learners have prerequisite skills and knowledge before training begins</td>
</tr>
<tr>
<td>- Assess whether learners have prerequisite skills and knowledge (such as administering pre-tests, checking HR records)</td>
</tr>
<tr>
<td>- Etc.</td>
</tr>
</tbody>
</table>
Proficient: I have a high degree of knowledge and skill in this competency
Adequate: I have a limited degree of knowledge and skill in this but get by
Need Improvement: I have very little knowledge and skill in this and need to improve

<table>
<thead>
<tr>
<th>Prepare to Facilitate</th>
<th>P</th>
<th>A</th>
<th>NI</th>
</tr>
</thead>
<tbody>
<tr>
<td>1a. Become familiar with training content and design</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Assess training design and materials for flow, clarity and timing</td>
<td>☑</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Incorporate feedback from previous deliveries to improve content and design</td>
<td></td>
<td>☑</td>
<td></td>
</tr>
<tr>
<td>• Coordinate roles and responsibilities when working with co – facilitator(s)</td>
<td></td>
<td>☑</td>
<td></td>
</tr>
<tr>
<td>• Develop subject matter expertise, where required to facilitate the training effectively</td>
<td></td>
<td></td>
<td>☑</td>
</tr>
<tr>
<td>• Ensure access to additional subject matter experts, as required to support facilitation</td>
<td></td>
<td></td>
<td>☑</td>
</tr>
<tr>
<td>• Rehearse challenging components of training design (such as explanations of concepts and activities)</td>
<td></td>
<td>☑</td>
<td></td>
</tr>
<tr>
<td>• Prepare to use classroom media and virtual classroom technology</td>
<td></td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>• Adapt classroom activities as needed for virtual classroom delivery</td>
<td>N/A</td>
<td>N/A</td>
<td></td>
</tr>
</tbody>
</table>

1.4 Study for the Exam

- Read some or all of the books depending on where your gaps are. How you study depends on you.
- Form or join a study group or go online to your Certification group and join the CSTD Linkedin groups and start a discussion.
- Post a message in the Forum of your Certification group
- Find out what your local Chapters are doing.

1.5 Practice Exams

The online CTDP Practice Exam™ is included in the certification registration fee. Taking the practice exam will provide you with an opportunity to test your knowledge on the theory of all five competency areas.

There are two Practice Exams available: Practice Exam #1 is located in your Certification Group on the CSTD website and Practice Exam #2 is in ExamBuilder https://testing.exambuilder.com/
Practice Exam #1: can be done multiple times. Once completed, you will receive your score and the answers will also be supplied for a thorough review of the practice exam. Practice Exam #2: can only be done once and consists of only 10 questions.

1.6 Scheduling the CTDP Knowledge Exam™

Exams centers are located all across Canada. To book your knowledge exam:

Login to www.cstd.ca with your username and password
1. Click the ‘Groups’ link located on the right side of the screen in the My Profile box
2. Click the ‘My CTDP’ link to enter your certification group
3. Click on the quick link: ‘Booking your Exam’
4. Select an examination site in the city of your choice
5. Select the date and time
6. Email: certification@cstd.ca with your request.
7. The Certification team will confirm your exam registration via email

Please use this format when booking your exam:
“I would like to schedule my exam for [insert date here], at [insert time here], at the [insert exam centre name and location].

Please also include your full name in your request.

Should a convenient location not be available, please contact the CSTD office for alternate options.

After registering, you will receive student exam instructions via email close to your exam date.

1.7 Exam Reading List

If you are studying for the CSTD certification exam, you should read the books on the specially selected Exam Reading List for Certification candidates. The list is also located at the back of the Competencies text.

<table>
<thead>
<tr>
<th>Books</th>
<th>assessing performance needs</th>
<th>designing</th>
<th>facilitating training</th>
<th>supporting transfer of learning</th>
<th>evaluating training</th>
</tr>
</thead>
</table>
Books

<table>
<thead>
<tr>
<th>Author(s)</th>
<th>Title</th>
<th>Publisher</th>
<th>Edition</th>
<th>ISBN</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mager, Robert F.</td>
<td>Goal Analysis: How to Clarify Your Goals So You Can Actually Achieve Them</td>
<td>Center for Effective Performance</td>
<td>3rd ed. 1999</td>
<td>1879618044</td>
</tr>
<tr>
<td>Mager, Robert F.</td>
<td>How to Turn Learners On... Without Turning Them Off: Ways to Ignite Interest in Learning</td>
<td>Center for Effective Performance</td>
<td>3rd ed. 1997</td>
<td>1879618184</td>
</tr>
<tr>
<td>Mager, Robert F.</td>
<td>Measuring Instructional Results</td>
<td>Center for Effective Performance</td>
<td>3rd ed. 1997</td>
<td>1879618168</td>
</tr>
<tr>
<td>Mager, Robert F., and Peter Pipe</td>
<td>Analyzing Performance Problems</td>
<td>Center for Effective Performance</td>
<td>3rd ed. 1999</td>
<td>1879618176</td>
</tr>
<tr>
<td>Morrison, Gary R., Steven M. Ross, and Jerrold E. Kemp</td>
<td>Designing Effective Instruction</td>
<td>Wiley</td>
<td>5th ed. 2006</td>
<td>0470074264</td>
</tr>
</tbody>
</table>

2. Skill Demonstration

The Skill Demonstration is the second portion of the Certification process and is completed only once the candidate has passed their exam. A calendar of available dates is located in the My CTP or My CTDP groups on the CSTD website.

Every candidate has one attempt at submitting their Skill Demonstration, should the candidate not be successful - there is a fee then applied for resubmission. Please consult the fee guide.

2.1 Preparing your submission

As a CTDP Candidate, you have two options:
1) Live Skill Demonstration (Facilitation), or
2) Project Submission
Skill Demonstration: Live Skill Demonstration

The Live Skill Demonstrations (Facilitation) are completed in real-time to an audience of other certification candidates and two assessors. The Certification team sends out a detailed schedule one to two weeks prior to the Live Skill Demo date.

Live Skill Demo Day Details

- This is an all-day time requirement
- Each facilitation session is 30 minutes – this is a timed session
- A brief interview with the assessors takes place afterwards

What to bring:
- Two copies of your completed & signed worksheets
- A printed copy of your resume – included in your binder
- If your session requires handouts – please prepare and bring them with you
- Bring your binder of material to the session so that the Assessors can use it when watching your delivery. You will be taking it back home once they have completed their review.

Skill Demonstration: Project Submission

- Assessing Performance Needs
- Designing Training
- Facilitation – Video submission
- Facilitation – Live Skill Demo

What should you select to submit? We suggest a recent or current project that allows you to demonstrate your skill in one of the competencies.

Get your employer on board by informing them of your intent to submit your work for your certification. This can be helpful if you need assistance to expand the project in order to demonstrate the quality criteria. This will also help to ensure that the materials you are proposing to submit are not considered to be classified materials by the company.

2.2 Skill Demonstration Worksheet

When preparing your materials, each candidate must complete the appropriate Skill Demonstration Worksheet. To download a copy of the worksheet, please go to the Skill Demonstration section in your Certification Group on the CSTD website. Use the skill demo worksheet to work through each of the Key Outputs and Quality Criteria.

Samples of the above worksheets can be found in this section of the manual under Tools and Resources.

- Sample of Assessing Performance Needs Skill Demo Worksheet
- Sample of Designing Training Skill Demo Worksheet
- Sample of Facilitating Training – Video Skill Demo Worksheet
- Sample of Facilitating Training – Live Skill Demo Worksheet
2.3 **Skill Demonstration Important Dates**

Each Candidate must register for their Skill Demonstration. Go to your Certification group and consult the Skill Demonstration Schedule and select a date. Send an email to certification@cstd.ca by the registration deadline.

**Worksheet Deadline - Live Skill Demonstration**
- Due two weeks prior to the Live Skill Demo Date
- Must be sent electronically to certification@cstd.ca

**Project Submission**
- All projects must be submitted by the specified deadline to:
  CSTD National Head Office
  720 Spadina Avenue
  Suite 315
  Toronto, ON
  M5S 2T9

Please note: Projects will not be returned unless specifically requested.

3. **Tools and Resources**

3.1 **Competencies for Training and Development Professionals**

CSTD published a revision to the standards for the training and development profession competencies in this document which does define effective performance but does not provide specific 'how to' instructions. The text identifies the core competencies for the profession organized into five categories:

1. Assessing performance needs
2. Designing training
3. Facilitating training
4. Supporting the transfer of learning
5. Evaluating training

Within each category, first, second and third level competencies are identified and each category is structured in the same way. The first page describes the category - introducing the overall purpose, terminology, importance of the category and other considerations. The second page provides an overview of first and second level competencies. Subsequent pages describe the importance of each second level competency and list their underlying third level competency. For a detailed explanation of the structure and format of the competencies refer to the Introduction Section in *Competencies*.

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## 3.2 Live Skill Demonstration: Facilitating Training

### About the worksheet:
Preparation for your live skill demonstration is a lot of work, and we want you to be successful. We have designed the submission worksheet to help you:

- Select a project that meets all the requirements for the skill demonstration
- Include all the relevant documentation with your submission
- Prepare for your live facilitation session and interview, and
- Show how you addressed all the quality criteria.

### Selecting a demonstration that meets all the requirements:
You must demonstrate or comment on each of the Key Outputs identified in the Facilitating Training section of *Competencies for Training and Development Professionals*, so it’s essential to select a session that gives you an opportunity to do that.

For example, your facilitation session must demonstrate the formal welcome to training, group discussions, addressing learner questions and comments, assessment of individual learner performance and so on. For selected Key Outputs, you must address the quality criteria in the report you will send in advance, while for others, you should be prepared to speak to them during a short interview with the assessors after you facilitate. The following pages of this worksheet outline exactly what’s required.

The demonstration should last no more than 30 minutes. It may be either a complete training session, or part of a longer session, and must include evaluation of learning objectives.

### Including all the relevant documentation:
For the Skill Demonstration in Facilitating Training, 2 weeks prior to the demonstration you must submit:

- A memory stick containing your chronological resume, with titles and dates, and a completed, electronic copy of this worksheet, saved as: “Facilitating Training Live Skill Demonstration _YOUR NAME.doc”
- A signed paper copy of your completed worksheet
- 2 copies of a binder or folder - also include paper copies of any materials you referenced in the worksheet

### Showing how you addressed all the quality criteria:
There are 3 opportunities to demonstrate how you met the quality criteria. Each is detailed in the worksheet.

<table>
<thead>
<tr>
<th>In your report</th>
<th>The worksheet indicates which specific Key Outputs and Quality Criteria you must address in your report in advance of the live skill demo. You will find form fields to provide references to your materials, or to provide a clear concise description of how your submission or experience meets the quality criteria. You’ll find an example of a completed section of the worksheet on the next page. Where no form fields are active, be prepared to demonstrate the output in your demo, or speak to it in your interview.</th>
</tr>
</thead>
<tbody>
<tr>
<td>During your demo</td>
<td>The worksheet indicates which specific Key Outputs and Quality Criteria you must demonstrate during your live session. You must ensure that you demonstrate each of these Key Outputs during the 30 minute live demonstration. You may be asked follow-up questions about any of the outputs during your interview.</td>
</tr>
<tr>
<td>During your interview</td>
<td>The worksheet indicates which specific Key Outputs and Quality Criteria you must speak to during your interview. You may also be asked follow-up questions about any of the outputs you demonstrated in your report or during your demonstration.</td>
</tr>
</tbody>
</table>
Example of completed section of the worksheet:

<table>
<thead>
<tr>
<th>Key Output</th>
<th>Quality Criteria</th>
</tr>
</thead>
</table>
| Positioning of transfer activities | a. Learning content, examples and activities linked to job and organization requirements  
   b. Importance of transfer activities positioned during training  
   c. Job aids and other relevant resources incorporated into training |

For this Key Output, you will need to provide an example from a training program you have facilitated where transfer of learning was an essential element of the solution.

Briefly describe the performance requirement(s) and the learning objectives.

The City of Rainbow Hills had a goal of streamlining the subdivision and land development approval process. Changes in this process were expected to:

- Simplify the approach to identification of Land Use and Servicing issues
- Simplify design and approval issues
- Improve the development community’s confidence in the City’s approvals schedule
- Improve alignment among City departments

They expected that training would be provided for an estimated 200 people. The primary audience included developers, engineering and planning consultants, outside agencies and many city staff. There were many learning objectives for the 3 days of training, but some examples include:

1. Identify the stages of the File Manager system and their role at each stage
2. Determine the appropriate level and type of content required in the Initial Proposal Report
3. Assess the information in the Initial Proposal Report for completeness
4. Identify issues which would require amendments to IPR to form Final Proposal Report
5. Identify issues which would result in re-submission

Briefly describe how you linked content, examples and activities to the job and organization requirements during training:

**Candidate Answer:** *This was an interesting program because all participants were working with the same real-life experiences but from opposing views, so it was important to ensure all activities and examples would allow participants to relate to them from either perspective. The program was already designed using a real site proposal as the basis for all examples and activities. I made sure I was familiar with that case and could speak to the ins and outs of it, and continually reinforced that the new process and documents would help meet the overall goal of streamlining the approvals process.*

<table>
<thead>
<tr>
<th>For Assessor use only:</th>
</tr>
</thead>
<tbody>
<tr>
<td>☐ Met</td>
</tr>
<tr>
<td>☐ Not met</td>
</tr>
</tbody>
</table>

Comments:

Briefly describe how you positioned transfer activities during training:

**Candidate Answer:** *Participants would have access to coaches after training, so I frequently reminded them that if they had any trouble with specific cases, they could talk to the coach. City staff also had learning plans for the 2 months following training, so I made sure to refer them to the learning plan activities that related to the topic we were covering or just covered.*
3.3 Project Submission: Video - Facilitating Training

About the worksheet
Preparing the submission of your skill demonstration is a lot of work, and we want you to be successful. We have designed the submission worksheet to help you:

- Select a project that meets all the requirements for the skill demonstration
- Include all the relevant documentation with your submission, and
- Show how you addressed all the quality criteria.
- Provide clear reference point to the location of specific information in the video, as requested on the worksheet

Selecting a demonstration that meets all the requirements
You must demonstrate and comment on each of the Key Outputs identified in the Facilitating Training section of the Competencies for Training and Development Professionals, so it’s essential to select a session that gives you an opportunity to do that. For example, your recording must demonstrate the formal welcome to training, group discussions, learner questions and comments, assessment of individual learner performance and so on.

The following pages of this worksheet outline exactly what’s required. We have indicated the few instances where Key Outputs are optional, or specific to e-learning.

The demonstration may be either a complete training session, or a module within a longer session.

Including all the relevant documentation
For the Skill Demonstration in Facilitating Training, you must submit:

- A memory stick containing your chronological resume, with titles and dates, and a completed, electronic copy of this worksheet, saved as: “Facilitating Training Video Skill Demonstration_ YOUR NAME.doc”
- A signed paper copy of your completed worksheet
- A recording of you facilitating training in the classroom or e-classroom
- A binder or folder with paper copies of materials referenced in the worksheet (optional)

About the video
Recordings must be in a format compatible with Windows Media Player. A link to an external website is not acceptable.

When you set up your camera ensure that all the activities in the classroom are recorded. Place the camera in a position so that the entire room is visible, including the participants. For example, the assessors cannot judge ability to interact with students if all the assessors see is the facilitator because the camera is focused on a screen at the front of the room. We recommend that a third party film the session to ensure they capture all the elements needed.

While you are welcome to edit the recording, you do not need to do so. You must, however, provide clear time or digital references to the location of specific information, as requested on the following pages of this worksheet. The assessment team must be able to skip through your demonstration and quickly locate the specific sections you are referencing.
Showing how you addressed all the quality criteria
On the following pages of this worksheet, you are asked to provide specific references to your recording, as well as a clear concise description of how your demonstration meets the quality criteria. You’ll find an example of a completed section of the worksheet below.

Example of completed section of the worksheet:

<table>
<thead>
<tr>
<th>Key Output</th>
<th>Quality Criteria</th>
</tr>
</thead>
<tbody>
<tr>
<td>Delivery of content</td>
<td>a. Content delivered as designed, using appropriate methods and activities</td>
</tr>
<tr>
<td></td>
<td>b. Delivery of content does not reduce time designed for practice</td>
</tr>
<tr>
<td></td>
<td>c. Language, including examples, clear and appropriate for learners</td>
</tr>
<tr>
<td></td>
<td>d. Bridges and transitions clear and link sections appropriately</td>
</tr>
<tr>
<td></td>
<td>e. Non-verbal communication supports learner interaction</td>
</tr>
</tbody>
</table>

Indicate the specific location(s) in your video where you demonstrated use of language and examples that were clear and appropriate for the learners. Briefly describe what you did.

**Candidate Answer:** 43:19-48:04
To explain the results/activities/behaviours, I used an analogy of how behaviours and activities affect weight loss.

Indicate the specific location(s) in your video where you bridged or transitioned between sections or topics. Briefly describe what you did.

**Candidate Answer:** 19:23-21:07
When transitioning from demonstration to practice, I emphasized the importance of practicing in a safe space.

Indicate the specific location(s) in your video where you demonstrated use of non-verbal communication to support learner interaction. Briefly describe what you did.

**Candidate Answer:** 12:02-14:36
I used non-verbal communication to support learner interaction by asking a question and then waiting for a response, rather than just responding when the group was quiet.

Describe specifically how you ensured delivery of content did not reduce time designed for practice:

**Candidate Answer:** There is 1.5 hours allocated for role plays, plus related discussion. I know I need to manage the time so we start the role-plays no later than 2pm, so I manage the time in the after-lunch activity by asking fewer questions and/or using the “parking lot” to ensure the group discussion ends by 2pm at the latest.
3.4 Project Submission: Designing Training

About the worksheet
Preparing the submission of your skill demonstration is a lot of work, and we want you to be successful. We have designed the worksheet to help you:

- Select a project that meets all the requirements for the skill demonstration
- Include all the relevant documentation with your submission, and
- Show how you addressed all the quality criteria.

Selecting a project that meets all the requirements
You must provide evidence of, or comment on, each of the Key Outputs identified in the Designing Training section of the Competencies for Training and Development Professionals, so it’s essential to select a project that gives you an opportunity to do that. For example, your submission must include desired performance outcomes, performance gaps, context requirements, task analysis, learning objectives, facilitator materials, and so on.

The following pages of this worksheet outline exactly what’s required. We have indicated the few instances where Key Outputs are optional, or specific to e-learning.

Including all the relevant documentation
For the Skill Demonstration in Designing Training, you must submit:

- A memory stick containing your chronological resume, with titles and dates, and a completed, electronic copy of this worksheet, saved as Designing Training Skill Demonstration YOUR NAME.doc
- A signed paper copy of your completed worksheet
- A binder or folder with paper copies of deliverables and materials
- CD/DVD or memory stick with any audio or video components
- CD/DVD or memory stick with the completed e-learning program (if applicable).

The binder should include tabs indicating the first level competencies for which they apply, for example: 1 Conduct design analysis, 2 Establish learning objectives, and so on. Paper materials should clearly indicate which Key Output they represent, and be organized in the order indicated in the worksheet.

E-learning materials which cannot be submitted in hard-copy must be submitted on a CD/DVD or memory stick, with clear instructions on how to launch. Links to live websites will not be accepted.

You must provide clear references to the location of specific information, as requested on the following pages of this worksheet. The assessment team must be able to skip through your materials and quickly locate the specific information you are referencing.

Showing how you addressed all the quality criteria
On the following pages of this worksheet, you are asked to provide specific references to your materials where certain quality criteria should be observable by the assessors. You are also asked to provide a clear concise description of how your demonstration meets certain quality criteria. In some cases, you may also be asked to describe how you validated the output.

You’ll find an example of a completed section of the worksheet on the next page.
Example of completed section of the worksheet:
In this example, you must describe how you met quality criteria a, b and c. Assessors should be able to observe successful compliance with quality criteria d.

<table>
<thead>
<tr>
<th>Key Output</th>
<th>Quality Criteria</th>
</tr>
</thead>
<tbody>
<tr>
<td>Task analysis</td>
<td>a. Task analysis documented and comprehensive</td>
</tr>
<tr>
<td></td>
<td>b. Task analysis based on first-hand knowledge of job responsibilities</td>
</tr>
<tr>
<td></td>
<td>c. Task analysis identifies sub-tasks, skills and knowledge required to</td>
</tr>
<tr>
<td></td>
<td>achieve desired performance outcomes</td>
</tr>
<tr>
<td></td>
<td>d. Task analysis uses active and appropriate verbs</td>
</tr>
</tbody>
</table>

Indicate the specific location(s) in your materials where the task analysis is documented:
Tab 1: Conduct design analysis, page 3

Describe specifically how you ensured the task analysis:

a. was comprehensive
b. was based on first-hand knowledge of job responsibilities
c. identifies sub-tasks, skills and knowledge required to achieve desired performance outcomes

**Candidate Answer:** Because we were developing a new process for reviewing plans for subdivisions, it was not possible to capture first-hand knowledge of the new job responsibilities.

To identify the sub-tasks, skills and knowledge required, I reviewed existing documentation on the old review process, and talked to File Managers as they reviewed submissions at various stages of the process to gather important information about vital tasks, best practices and anomalies.

To ensure the task analysis was comprehensive, and to check my understanding of the tasks, I worked closely with the File Manager and their supervisor, the Director of Planning. Together we walked through each stage and step of the proposed process to identify what would be the same, what would be different, and where we weren’t quite sure. We were able to refine the process during this stage. The result was a detailed WHO, WHAT, WHEN table clearly indicating tasks, ownership and timing for all activities in the review process.

Describe specifically how you validated the task analysis:

**Candidate Answer:** I walked through the refined detailed process with key members of the core team. After a few modifications and review cycles, the process (task analysis) was signed off by the core team, when they all agreed that this refined process would help them meet their stated performance outcomes (improved turnaround times at each stage of the process).
3.5 Project Submission: Assessing Performance Needs

About the Worksheet
Preparing the submission of your skill demonstration is a lot of work, and we want you to be successful. We have designed the worksheet to help you:

- Select a project that meets all the requirements for the skill demonstration
- Include all the relevant documentation with your submission, and
- Show how you addressed all the quality criteria.

Selecting a project that meets all the requirements
You must provide evidence of, or comment on, each of the Key Outputs identified in the Assessing Performance Needs section of the Competencies for Training and Development Professionals, so it’s essential to select a project that gives you an opportunity to do that. For example, your submission must include a job, competency or goal analysis, performance gaps and causes, and so on. The following pages of this worksheet outline exactly what’s required.

Including all the relevant documentation
For the Skill Demonstration in Assessing Performance Needs, you must submit:

- A memory stick containing your chronological resume, with titles and dates, and a completed, electronic copy of this worksheet, saved as: “Assessing Performance Needs Skill Demonstration_ YOUR NAME.doc”
- A signed paper copy of your completed worksheet
- A binder or folder with paper copies of deliverables and materials

The binder should include tabs indicating the first level competencies for which they apply, for example: 1 Prepare to assess, 2 Identify performance gaps, and so on. Paper materials should clearly indicate which Key Output they represent, and be organized in the order indicated in the worksheet.

You must provide clear references to the location of specific information, as requested on the following pages of this worksheet. The assessment team must be able to skip through your materials and quickly locate the specific information you are referencing.

Showing how you addressed all the quality criteria
On the following pages of this worksheet, you are asked to provide specific references to your materials where certain quality criteria should be observable by the assessors. You are also asked to provide a clear concise description of how your demonstration meets certain quality criteria. In some cases, you may also be asked to describe how you validated the output.

You’ll find an example of a completed section of the worksheet on the next page.
**Example of completed section of the worksheet:**

In this example, assessors should be able to observe successful compliance with quality criteria a and b of the Needs assessment report, and you must describe a specific example of a situation.

<table>
<thead>
<tr>
<th>Key Output</th>
<th>Quality Criteria</th>
</tr>
</thead>
</table>
| Needs assessment report     | a. 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  
b. Report updated to include modifications based on feedback from the client and key stakeholders |
| Presentation of needs assessment report | a. Presentation begins with an agenda  
b. Presentation highlights recommended training and non-training solutions based on key findings  
c. Presentation provides an opportunity for client and stakeholders to ask questions  
d. Presentation addressed questions asked or concerns raised by client and stakeholders |

Indicate the specific location(s) of the needs assessment report:
Tab 5: Validate next steps and measures, pages 1-12

For Assessor use only:

<table>
<thead>
<tr>
<th>Met</th>
<th>Not met</th>
</tr>
</thead>
</table>

Comments:

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?

**Candidate Answer:** The VP Operations expressed a concern that line managers were too busy to be able to provide coaching time to support learners, and they didn’t feel comfortable in a coaching role. Luckily, the President and head of production were involved in the assessment process, so I had their support in this area. I explained that it was critical that the process change had visible support from all levels of management in order to be successful, and that it was vital that first line supervisors played a role in this. I also reiterated that one component of the recommendation was to provide a coaching workshop for first line supervisors which should help increase their skill and comfort levels around coaching. The VP Ops said that was a good idea, but that still didn’t mean they had time to coach. The President then suggested that he would like to explore the idea of making coaching a part of the reward and recognition program, so that they were actually rewarded for making time to coach. We included this idea in the final report as an area for further exploration.
SECTION C: Administrative Policies

1. General Policies and Procedures

The following information applies to all certification candidates.

1.1 Membership & Certification

At CSTD, membership and certifications are separate. Membership however, is a requirement for certification.

Requirements of Membership:
- To attest that they have read and agree to abide by the Member Code of Ethical Conduct
- To pay membership dues

Requirements of Certification:
- To be a member in good standing
- To complete all requirements

1.2 Examination & Skill Demonstration Retake Policy

Exams
Should a candidate not be successful with their first try of the exam, they are able to reschedule a second attempt at no additional cost. Any subsequent attempts will incur a fee. Refer to fee guide for fees for exam cancellations.

Skill Demonstration
Each candidate must submit a Skill Demonstration in order to complete their Certification process. Should the candidate not be successful, there is a fee applied to a re-submission. Please consult the fee guide for further details.

1.3 Statement of Accommodation

CSTD policy is to provide accommodation for special needs requirements to the best of its ability. Accommodation may include changes or modifications to standard practices. Candidates requiring accommodation for special needs should make the request to the CSTD office at certification@cstd.ca immediately upon registering for their exam or skill demo.

Medical and / or other documentation supporting the request may be required and should be further discussed.

Accommodation arrangements may include but are not limited to:
- Longer examination time
- Breaks within the examination room
- Examinations in larger font size
- Paper examinations in larger font size or printed on different colour paper
- The provision of narrators or scribes for the examination

As each Candidate has individual needs, CSTD will consider each person on a case-by-case basis.

2. Complaints & Appeals

2.1 Appeals Procedure Eligibility

An individual may appeal a decision about not meeting the work experience pre-requisite to register for the Certification program by submitting a written appeal to CSTD Staff as follows:

CSTD
Attention: Director of Certification
720 Spadina Avenue, Suite 315
Toronto, Ontario M5S 2T9

An appeal must clearly document detailed evidence supporting an individual’s claim for legibility based on the current pre-requisites for registration. The Appeals Committee will review only those claims which breach the current pre-requisites for registration.

Appeals Procedure:

A candidate must submit all appeals in writing within 7 days of the denial of eligibility for registration using the Appeal Form. Appeals dated more than 7 days after notification will not be reviewed.

Only information concerning not meeting the work experience pre-requisites will be the subject of this appeal.

If the Appeals Committee determines that, despite any additional information provided by the applicant, he or she does not meet the eligibility pre-requisites, the request will be denied.

If the Appeals Committee finds that cause exists to re-evaluate eligibility, it will recommend to staff that the appeal be granted and the applicant’s eligibility is re-evaluate criteria.