Certified Performance Technologist



**CPT Application**

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Updated: 3/2020

### Preparing to Apply

1. Read Parts I and II of the Certification Application.

* Part I contains administrative forms.
* Part II includes two forms and the work description questions you must answer to provide the evidence you meet the competency requirements for each of the 10 CPT Standards.

The following chart describes each form.

|  |  |
| --- | --- |
|  | **Application Contents** |
| **Part I** | Mail, fax, or submit electronically to [certification@ispi.org](mailto:certification@ispi.org) or Judy@HaleCenter.org |
| Application Payment | Provides the data required to pay ISPI’s processing fee for granting certification. |
| CPT Code of Ethics | A document you sign to affirm you will follow the CPT Code of Ethics. |
| Declaration and Release | A document you sign that declares you agree with rules that govern the CPT application process. It also releases ISPI from specified responsibilities. |
| Application Agreement | A document you sign affirming that you met the certification requirements and grant permission to reproduce part of the work descriptions. |
| Candidate Information | Provides your contact information. |
| Employer Notification | You complete this form if you want ISPI to notify your supervisor you have been certified. |
| Experience | A brief description of your three years of performance improvement work experience. |
| Attester Contact Information | Describes who will confirm the accuracy of the statements made by the CPT candidate regarding his/her involvement with every project included in the work description. |
| Attestations | A knowledgeable third party confirms (or attests to) your role during each project included in the work description. |
| **Part II** | Submit electronically to [certification@ispi.org](mailto:certification@ispi.org) or Judy@HaleCenter.org |
| Candidate Contact Information | Reviewers do not see this. The Director of Certification uses it to assign a number to your Part II Application projects to ensure proper control and processing. |
| Projects and Standard Identification | Your description of each project submitted. It identifies which Standards were met. |
| Work Descriptions | Your answers the questions for each required project that clearly demonstrate your proficiency for each of the 10 CPT Standards. |

1. You will need to complete Part II before completing Part I.
2. Review the 10 CPT Standards document to understand the outcomes for each Standard and examples of actions associated with each one.
3. Using the Part II, Project and Standard Identification Form, identify projects within the last 10 years where you had (1) a significant role and (2) can describe how you met all 10 Standards at least 3 times.
   * + Identify at least three projects with a large enough scope to demonstrate that you met the first four Standards and at least three other Standards.
     + If your first three projects do not cover Standards 5-10 three times, identify up to four additional projects that demonstrate the remaining Standards.
4. Identify the individual(s) who will attest that the work you described for every project was done by you and it was of value to the organization.
5. Discuss the project(s) and your role with the Attester you have selected for each project.

CPT **Application**



## Part I

### Part I Instructions

This is the first part of the two-part Application. You complete these forms after you have completed Part II before submitting your completed application.

1. Complete the Candidate Information Form.
2. Complete the Employer Notification Form if you want ISPI to send your supervisor a notification letter about your certification.
3. In the Experience section, briefly describe your three years of performance improvement experience.
   * Example: I was the director of performance improvement for two years and an organization development specialist for two years at a telecommunications firm. Prior to that I was an instructional developer for a retail firm.
4. Read, print, sign, and date the Application Agreement.
5. Complete the Attester Contact Information Form.
   * Ensure you have an attester for each project to cover all 10 Standards 3 times.
6. Work with your attester(s) to complete the Attestation Form for the projects you describe.

* To complete the attestation you need to send a copy of the Project Identification Forms and Work Descriptions to a third party that is knowledgeable about the work and your role in its completion.
* Edit the Sample Letter to Attester and include a copy of the Attestation Form (both located in Part I) to send to your attester(s).
* Send the Attestation Form and a copy of the Project Identification and Work Description to the attester.
* Complete a separate Attestation Form from Part II of the Application for each project.
* You may have multiple Attesters for a project and up to seven projects to complete the application
* The Attester reads your work, completes the Attestation Form(s), and sends it back to ISPI per Attester Form instructions.
* Once completed, the Attester should forward the completed and signed Attestation Form to ISPI by mail, fax, or e-mail to the addresses or numbers listed in the Submission section that follows.

1. Include or confirm your payment using the Application Payment Form at Part I.

### Application Payment Form

|  |  |
| --- | --- |
| **Applicant's Name:** |  |

There are four ways to pay your CPT Application fee.

1. Check (personal or corporate)
2. Credit Card (personal or corporate)
3. Pre-paid as part of ISPI’s CPT Certification Workshop fee
4. Wire Transfer

**Payment by Check**

* Make the check payable to ISPI.
* Mail checks with this application to the address provided in the submission instructions of this document.

**Payment by Credit Card**

* Contact ISPI at [certification@ispi.org](mailto:certification@ispi.org) for guidance how to pay via credit card.
* ISPI accepts VISA, Master Card, American Express and Discover.
* Register for the workshop or the certification at [www.HaleCenter.org/certification](http://www.HaleCenter.org/certification) and pay online.

**Pre-paid Workshop**

* If you attended an ISPI CPT Certification Workshop that included your CPT Application payment, include a copy of your workshop completion certificate with your completed CPT Application.

**Wire Transfer**

* Contact ISPI at [certification@ispi.org](mailto:certification@ispi.org) for Wire Transfer details.

**All payments must be made in U.S. dollars.**

Check payment option completed.

|  |  |
| --- | --- |
|  | Check Enclosed for Payment |
|  | Payment made by credit card on \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
|  | Pre-Paid Workshop Certificate enclosed |
|  | Wire Transfer |

Application review will not begin until payment has been confirmed.

### CPT Code of Ethics

The Code of Ethics is intended to promote ethical practice in the profession. As performance professionals, we are responsible for adding value to the organizations we serve and ethically contributing to their success. We accept personal responsibility for our individual decisions and actions. We also advocate for the profession by engaging in activities that enhance its credibility and value.

To be certified, recertified or reinstated as a Certified Performance Technologist (CPT), you must sign a statement agreeing to conduct yourself in ways that adhere to the following seven core principles on which the code is based.

**Core Principles**

**I will:**

**1. Add Value**  
Strive to conduct myself and manage my projects and their results in ways that add value to my clients, customers, and communities they serve and the global environment.

**2. Promote Validated Practice**  
Use validated best practices in performance technology strategies and implementation of the CPT Standards.

**3. Collaborate**  
Work collaboratively with diverse clients and users, functioning as a trustworthy strategic partner. Treat people with dignity, respect, and compassion to foster an inclusive and diverse work environment.

**4. Engage in Continuous Improvement**  
Pursue professional development to improve my proficiency in the practice of performance technology and attain the highest standards of competence.

**5. Exhibit Integrity**  
Be honest and truthful in my representations to clients, colleagues, and others with whom I may come in contact while practicing performance technology.

**6. Preserve Confidentiality**  
Maintain client confidentiality and consider and protect the rights of individuals, especially in the acquisition and dissemination of information, while ensuring truthful communications and facilitating informed decision making.

**7. Cultivate Trust**Maintain a high level of trust with my clients, colleagues, and others with whom I may come in contact by avoiding activities that create actual, apparent, or potential conflicts of interest.

**General Guidelines**

**Intent**

* To build respect, credibility, and strategic importance for the performance technology profession within our organizations, the business community, and the communities in which we serve
* To assist the organizations in which we work to achieve their objectives and goals
* To protect the interests of our stakeholders as well as the integrity of the profession
* To inform and educate current and future practitioners, the organizations we serve, and the general public about principles and practices that help the profession
* To create and sustain environments that encourage all individuals and ISPI to reach their fullest potential in a positive and productive manner
* To build trust among all constituents by maximizing the open exchange of information, while eliminating anxieties about inappropriate or inaccurate acquisition and sharing of information
* To prioritize professional obligations by identifying conflicts of interest or the appearance thereof when conflicts arise and to disclose them to relevant stakeholders
* To act as role models in leadership situations as an example for maintaining the highest standards of ethical conduct
* To collaborate with team members and foster a spirit of open communication with adherence to ethical conduct
* To encourage professional decision making and social responsibility

**Examples of Practices**

1. Adhere to the highest standards of ethical and professional behavior. Report to appropriate authorities within or external to the client organization any instances of malfeasance, dangerous behavior, illegal or unethical activities.
2. Comply with all applicable laws where we work.
3. Act in a responsible manner and practice sound management in the countries in which clients or customer organizations operate.
4. Support decisions made by our clients and professional organizations that are both ethical and legal.
5. Perform work consistent with the values and principles of the profession.
6. Strive to achieve the highest levels of service, performance, and social responsibility. Respect the rights of consulting colleagues and consulting firms’ intellectual property.

I affirm that I have read and agree to be bound by the following Code of Ethics.

I agree in my practice to conduct myself in ways that are in keeping with the statement of expectations and the principles in the Code of Ethics and agree to a set of rules related to accurately representing the credential to employers, client, and customers.

|  |  |
| --- | --- |
| Sign |  |
| Print Name |  |
| Date |  |

### Declaration and Release

I attest that I have read and agree to be bound by the following Declaration and Release.

I understand the information gathered in the certification process may be used by the International Society for Performance Improvement (ISPI) for statistical purposes for the evaluation of the certification program or for other research or study.

I understand that ISPI staff and CPT Reviewers will follow security procedures (determined by Certification and Accreditation Governance Committee) to keep the information in their possession confidential.

I understand that ISPI reserves the right to contact me to discuss the possibility of publishing parts of my description of one or more of the projects I submit (while keeping the names of individuals, organizational entities, etc., confidential) as a way of promoting the principles of performance improvement and hereby provide copyright permission for that publication. I further understand that I will be notified in writing of the intention to publish.

I agree to immediately inform ISPI of any changed circumstances that may affect this application and the information that has been provided by me or that may affect my continuing eligibility.

I authorize ISPI to include my name and contact information in any publicly available lists or directories in which the names of Certified Performance Technologists are published, and hereby waive any rights of objections to such listings.

I understand and agree that ISPI owns all right, title, and interest in and to all names, trademarks, logos, copyrights, applications, and other materials related to the Certified Performance Technologist Program, and I agree that I shall only use such intellectual property in accordance with policies promulgated by ISPI and agree to cease using such intellectual property upon the expiration, suspension, or termination of my certification.

I understand and agree that ISPI makes no claims, warranties, guarantees, or promises regarding the content or performance of any applicant, and I agree not to misrepresent my certification status and its meaning.

I do hereby attest to the accuracy and validity of, and assume full responsibility for, the content of the application and all materials and information used by me in support of the application, and all use thereof by third parties.

In consideration of my application to and participation in the Certified Performance Technologist Program, I do hereby:

* Release, discharge, and hold harmless, individually and collectively, ISPI and their officers, directors, employees, committee members, members, subsidiaries, agents, successors, and assigns, from any and all liabilities that may arise, directly or indirectly, now or in the future, by reason of or in connection with any decision, action, or omission relating to this application, the failure to grant certification or recertification, the revocation of certification, or the certification standards;
* Indemnify, save, and hold harmless, individually and collectively, ISPI and their officers, directors, employees, committee members, members, subsidiaries, agents, successors, and assigns, from any and all liabilities that may arise, directly or indirectly, now or in the future, by reason of or in connection with any acts or omissions of mine. The foregoing release and waiver of liability, and the foregoing indemnification, shall be binding on me and my heirs, executors, administrators, successors, and assigns.

I also understand and agree that in considering this application, ISPI may make inquiry of such persons or entities, inspect such records, and make and retain copies of such materials as they deemed appropriate.

Without limiting the generality of the foregoing, I hereby authorize to make such inquiries regarding my fitness for certification and authorize any persons or entities contacted to respond to such inquiries and provide copies of any relevant and non-confidential information to the requesting organization.

I further authorize ISPI to provide a copy of this Declaration and Release to those entities contacted in connection with this application.

|  |  |
| --- | --- |
| Sign |  |
| Print Name |  |
| Date |  |

### Application Agreement

I attest that the work described as a part of this application process was done within the last ten years. I attest that the work described as a part of this application process was performed by me. If any of the projects that I have cited were done by a team, I attest that my contributions to the effort were significant enough for me to demonstrate proficiency in the applicable Standard(s).

I further understand that:

1. ISPI may revise the CPT Performance Standards and process for achieving and maintaining the CPT designation. (Note: Be certain that the application you are completing is the most current edition located at the ISPI website).
2. I must sign and send all parts of this application to ISPI before CPT Reviewers will evaluate my Work Descriptions.
3. ISPI shall not be responsible for lost or damaged application materials.
4. This application and all accompanying and subsequently submitted materials shall become the property of ISPI upon submission.
5. ISPI will return any application if it does not meet writing standards expected of a professional certification application. ISPI will explain why the application was returned.
6. Applications that contain erroneous or misleading information may result in denial of the application, revocation of certification, and forfeiture of the application fee.
7. Certification may be revoked for the following reasons (among others):

* Any misrepresentation in the application, whether intentional or unintentional;
* An individual no longer meets one or more of the CPT Performance Standards for certification; or
* Nonpayment issues.

1. If I do not meet one or more Standards, I will be notified in writing which Standard(s) was/were not met and why. This will include written feedback from the CPT Reviewers. I will have three options for my original application available to me at this point:
   * I may resubmit a revised application to meet the identified Standard(s) within the next 12 months without additional charge beyond the balance of the original submission fee.

* I may choose not to resubmit a revised application. ISPI will refund the certification fee less $250 that is used to pay for the reviews.
* I may appeal the decision to ISPI within two weeks of receipt. If I appeal, I understand that another impartial reviewer will evaluate my application.

1. After the original submission and one resubmit, I may be charged an additional review fee of up to $200, depending on the amount of work needed.
2. I hereby authorize ISPI to contact the individuals who will attest to the authenticity and quality of the work I describe as a part of the application process.
3. I hereby grant ISPI or its agent copyright clearance to publish my project description(s) should ISPI choose to do so.
4. I affirm that I have read and agree all information contained this Application Agreement including the Code of Ethics, Declaration and Release, and the permission to publish. My signature below constitutes my agreement with all information contained in this document.

|  |  |
| --- | --- |
| Sign |  |
| Print Name |  |
| Date |  |

### Candidate Information

|  |
| --- |
| Name: |
| Organization: |
| Job Title: |
| Address (where certificate can be sent): |
| City/State/Province/Country: |
| Zip/Postal Code: |
| Phone: |
| E-mail Address: |
| Name as it should appear on CPT certificate: |

### Employer Notification

Provide this information if you want ISPI to send your supervisor a letter letting your supervisor know you have been certified.

|  |
| --- |
| Supervisor's Name: |
| Organization: |
| Job Title: |
| Address: |
| City/State/Province/Country: |
| Zip/Postal Code: |
| Phone: |
| E-mail Address: |

### Experience

|  |
| --- |
|  |
|  |

### Attester Documents

**Contact Information Form**

|  |
| --- |
| **Attester Contact Information Form** |
| **Project Name:** |
| **Name of Attester:** |
| **Relationship:** |
| **Title:** |
| **Organization:** |
| **Address:** |
| **City/State/Province/Country:** |
| **Zip/Postal Code:** |

Attestation - Project Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

|  |  |  |
| --- | --- | --- |
| **International Society for Performance Improvement**  **CPT Performance Standards** | | |
| **Standard** | **Comments** | |
| 1. Focus on Results or Outcomes | |  |
| 1. Take a Systemic View | |  |
| 1. Add Value | |  |
| 1. Work in Partnership with Clients and Stakeholders | |  |
| 1. Determine Need or Opportunity | |  |
| 1. Determine Cause | |  |
| 1. Design Solutions including Implementation & Evaluation | |  |
| 1. Ensure Solutions’ Conformity and Feasibility | |  |
| 1. Implement Solutions | |  |
| 1. Evaluate Results and Impact | |  |

I have read the above CPT Standards.

I have also read the Work Descriptions and examined the exhibits for each Standard that the candidate listed below submitted to me to attest to for CPT Certification.

I have sufficient knowledge of the project and can judge the quality of the work performed.

I, therefore, attest that:

* The work described was done by the candidate.
* The work description is accurate.
* If the candidate was a member of a team, his or her contributions were significant enough to demonstrate the Standard.
* Throughout the process the candidate’s conduct was ethical and professional. (S)he was:
* Honest in how he or she presented information.
* Honest in how he or she represented his or her capabilities.

My signature below affirms that the CPT candidate met the Standards cited above.

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| |  |  | | --- | --- | | Signature |  | | Printed Name of Attester |  | | Date Signed |  | | Name of Candidate |  | |

**Disposition of the Completed Form**

Please e-mail the completed form to [certification@ispi.org](mailto:certification@ispi.org) with the name of the CPT Candidate in the subject line. The Certification Candidate will provide you with the mailing address or fax number if you are unable to e-mail this form.

**Sample Letter from Candidate to Attester**

Date:

Attester’s Name:

Address:

City/State/ZIP:

Dear \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_:

I am applying to receive the designation of Certified Performance Technologist (CPT) from the International Society for Performance Improvement (ISPI). There are a total of 10 professional Standards I must demonstrate that I have successfully performed in my work.

As part of the application process, I need you to attest to the work I have done with you. I have enclosed the necessary forms describing the work I performed and the related Standards. Please review and sign the form attesting to the fact that I completed the work as described. There is also a place for any comments you would like to make. Please return the completed forms to [certification@ispi.org](mailto:certification@ispi.org) with my name in the subject line.

Thank you for your assistance in reviewing my performance in light of these professional Standards. This certification is an important part of my professional development because it recognizes the work that I have done in the past and evaluates that work against the Standards for my profession.

Very truly yours,

(Candidate name)

(Contact information)

**CPT Application**



## Part II

### Part II Instructions

This is the second of two parts of the CPT Application. It includes the Project Identification and Work Description Forms. These forms are intended to provide a description of the work you did to meet the 10 CPT Standards.

To complete the forms, do the following.

1. Complete the Candidate Contact Information.
   * This form is for identification purposes only and will not be sent to a reviewer.
   * **Please do not add your name to the footer of the form or the following two forms.**
2. Complete the Project and Standard Identification Form for each project you are using for this application.

* Think of this form as an abstract of your work for the reviewer.
* **Project Number:** Identifies the project within your application. Use 1-7.
* **Project Name:**  Provide a descriptive name for your project.
* **Year Work Competed:** List the year the project was completed. The project must have been completed within the last ten years.
* **Standards Met:** Mark Standards 1-4 for your first three projects and **at least three** others from Standards 5-10 during that program. (To check a box, double-click the left mouse button over a box, click on properties, and click the checked button under Default to convert it to a checked box)
* You must demonstrate all 10 Standards three times.
* The first three projects must meet Standards 1-4 plus at least three others.
* If the first three projects do not meet all 10 Standards, you can use up to four additional projects to describe the missing Standards (5-10).
* A maximum of seven projects may be used for the application.
* **Project Description:** Describe the performance gap; need or opportunity; intervention(s); and its effect on the organization, community, or government. Include the project scope in terms of dollars required, number of people or locations involved, and the results achieved.
* You should be able to show change in a measurable way.
* The scope should be in terms of dollars required; number of people or locations involved; and the impact on the organization, successful or not.
* The project should include at least 3 of the following levels: society, marketplace, workforce, workplace, work, and worker.
* **Your Role:** Briefly describe your role on this project.
* Your role should be significant.

1. Complete a Work Description Form covering the 10 Standards for each project.
   * Refer to the overview of the 10 CPT Standards to guide your thoughts while answering the questions for each Standard.
   * Answer the questions listed under each Standard’s description.

* Write clear concise descriptions of how you demonstrated the respective Standards.
* Try to limit your narrative responses to about 250 words for each Standard.
* Add artifacts or other evidence to support your descriptive narratives for each Standard.

1. Once you have completed your documentation for one project, repeat the process for your additional projects.

* The first three projects are required to include Standards 1 through 4 and at least three process Standards.
* If the first three projects include all 10 Standards, you are done.
* If the first three projects do not include all 10 Standards, you can document up to four additional projects to demonstrate Standards 5 through 10 a total of three times each.

1. Save the document as a Microsoft® Word .doc or .docx using the following name:

* CPT Project ID and Work Description <insert your initials here>
* For example: If your name was Chris Lee Sample, your document name would be: **CPT** **Project ID and Work Description CLS.doc**

1. E-mail the completed form to [certification@ispi.org](mailto:certification@ispi.org) as a Microsoft® Word document. No other format will be accepted.

* Use the following subject line for the email: CPT Project ID and Work Description<insert your name here>.
* Example: If your name was Chris Lee Sample, your subject line would be: **CPT Project ID and Work Description Chris Sample.**

### Candidate Contact Information

|  |  |
| --- | --- |
| Name | |
| Street Address | |
| City/State/Province | |
| Country | Zip/Postal Code |
| Phone | Email |

### Project and Standard Identification Form

|  |
| --- |
| **Project and Standard Identification Form** |
| **Project Number**: |
| **Project Name:** |
| **Year Work Completed:** |
| **Standards Met\*: Principles: 1**  **2**  **3**  **4**  **Process:** **5**  **6**  **7**  **8**  **9**  **10** |
| **Project Description:** |
| **Your Role:** |

**\*To check a box, double-click the left mouse button over a box, click on properties, and click the checked button under Default to convert it to a checked box**

### Work Description Form

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| **Project Name:** | | |  | | | | |
| **Standard 1: Focus on Results or Outcomes** | |
| Describe what you did to ensure your clients and stakeholders were focused on the desired results or outcomes. | | | |
| **Standard 2: Take a Systemic View** | | | | | |
| Describe what you did to ensure your clients and stakeholders took a systemic view. Include at least 3 of the following: society, marketplace, workforce, workplace, work, and worker | | | | |
| **Standard 3: Add Value** | | | | | |
| Describe what you did to add value. | | | | |
| **Standard 4: Work in Partnership with Clients and Stakeholders** | | | |
| Describe what you did to facilitate a collaborative relationship with the clients and stakeholders.  You *may* create a table that lists the clients and stakeholders (by position/title) that you partnered with throughout the project. One option is to include the role of the position/title on the project, how you partnered with them throughout the project, and the impact each partnership had on the program’s results or outcomes. | | | | | | | |

|  |  |
| --- | --- |
| **Standard 5: Determine Need or Opportunity** | |
| **Describe your work in meeting this Standard by answering the following questions.** | | |
| 1. How did you define and scope the project? 2. What performance level(s) did you investigate and why? Each project requires the inclusion of at least 3 of the following levels: society, marketplace, workforce, workplace, work, and worker. 3. What was your data sampling strategy? 4. What data collection and analysis methods did you use? 5. Describe how the methods supported the purpose of the investigation. 6. Describe the goal of the project in measurable terms. 7. What performance deficiencies or unmet opportunities did you discover? | | |
| **Standard 6: Determine Cause** | |
| **Describe your work in meeting this Standard by answering the following questions.** | |
| 1. How did you determine the underlying causes? | |
| 1. What cause(s) did this analysis uncover for each performance gap? | |

|  |  |
| --- | --- |
| **Standard 7: Design Solutions including Implementation and Evaluation** | |
| **Describe your work in meeting this Standard by answering the following questions.** | |
| 1. How did you design the solutions as they relate to the outputs of Standards 5 and 6? | |
| 1. How did you plan to implement the designed solutions? | |
| 1. How did you plan to evaluate the designed solutions? | |
| **Standard 8: Ensure Solutions’ Conformity and Feasibility** |
| **Describe your work in meeting this Standard by answering the following questions**. | |
| 1. How did you ensure the solutions conformed to the design specifications during development? | |
| 1. How did you ensure the feasibility, workability, adoption, or success of the solutions during development? | |
| **Standard 9: Implement Solutions** | | |
| **Describe your work in meeting this Standard by answering the following questions.** | | |
| 1. What implementation strategies were developed to allow clients to sustain change? | | |
| 1. What methods did you use to track or monitor the new behaviors or changes during implementation? 2. What methods did you use to sustain new behavior or changes? | | |
| **Standard 10: Evaluate Results and Impact** | | |
| **Describe your work in meeting this Standard by answering the following questions.** | | |
| 1. How was the impact of the solution measured in terms of a change in results or outcomes on individual, team, or organizational performance as identified in Standard 5? | | |
| 1. How was ongoing evaluation integrated into a performance sustainment and/or continuous improvement strategy? | | |