



# ATD Certification Non-Chapter Affiliated Study Group Guide

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## ATD OVERVIEW

The Association for Talent Development (ATD), formerly the American Society for Training and Development (ASTD), is the world's largest association dedicated to those who develop talent in organizations. ATD has more than 33,000 members from more than 120 different countries. There are also more than 100 ATD chapters throughout the United States. ATD provides numerous resources, such as research, analysis, benchmarking, online information, books, and other publications to its members. The purpose of ATD chapters is to provide local networking and professional development opportunities for training, talent development, and performance improvement professionals across the United States. The leadership structure of these chapters varies widely and allows for numerous involvement options.

## THE ATD CERTIFICATION INSTITUTE

The ATD Certification Institute (ATD CI) is an independent not-for-profit organization ATD created to set industry standards for the talent development profession.

The institute's **mission** is to elevate the talent development profession by:

- Setting talent development industry standards
- Providing an independent assessment of those standards through testing
- Supporting career paths through a flexible stackable credentialing framework
- Ensuring recognition for those who have earned the certification
- Recognizing continued professional development through certification maintenance

Its **vision** is to provide world-class credentials for the talent development community.

The institute is responsible for the development, administration, and governance of ATD's credentialing program, including the APTD and CPTD credentials. In accordance with international accreditation standards for certification programs, ATD CI operates at arm's length from ATD's education and training programs to ensure separation of the assessment process from training or test prep.

## ATD CI CODE OF ETHICS

The ATD CI Code of Ethics (the "Code") serves as a code of professional conduct and describes the behavior expected of a talent development professional.

I will:

1. Comply with all copyright laws and the laws and regulations governing my position.
2. Maintain integrity in the practice of my profession.
3. Conduct myself in an ethical and honest manner.
4. Fairly and accurately represent my credentials, qualifications, experience, and ability.

I strive to:

1. Provide my employer, clients, and learners with the highest-level quality education, training, and development.
2. Keep informed of pertinent knowledge and competence in this field.
3. Support my peers and avoid conduct that impedes their practicing their profession.
4. Improve the public understanding of talent development.

## INTRODUCTION

The purpose of this guide is to provide support and resources for those who would like to form a study group to help candidates prepare for the Certified Professional in Talent Development (CPTD) exam.

This guide will provide advice on how to plan and organize a group and includes a sample schedule, list of resources, and tips on facilitation and working with subject matter experts (SMEs). **Appendix A** includes a summary of key information about the APTD and CPTD credentials, but this guide focuses on forming study groups for the CPTD credential.

### Why Create a Study Group?

Adults learn best when they build on their experiences, share their expertise, learn from peers, and apply new knowledge to current problems. Adult learners often need to unlearn old habits and practices. Working with a group can provide insights and challenges to old ways of thinking that are less likely to occur when individuals study alone. Study groups can also provide important emotional and psychological support throughout the certification process.

### Adult Learning Principles

The most successful study groups use practices that support adult learners. Key principles to keep in mind include to:

- **Create a Climate of Respect:** Adults learn best in an accepting and supportive environment. Setting ground rules early to promote a climate of mutual respect will help create a safe learning environment.
- **Build on Experience:** Adults have a wealth of knowledge and experience at their disposal. They draw upon that experience to make sense of new learning. Encourage members to use that knowledge and share their expertise with the group.
- **Learn Collaboratively:** Adults learn by connecting new knowledge to existing constructs. Provide adequate time to allow group members to make those connections and to respectfully challenge one another's thinking.
- **Apply Learning:** Adults cement their learning by applying it to current problems. Encourage study group members to apply what they learn at each session to a situation at work or home.
- **Empower Participants:** Adult learners learn best when they have control over their learning process. Tailoring sessions to the needs of the group, providing an array of resources, and encouraging self-assessment will allow members to shape their learning experience.

### Study Group Purpose and Guidelines

The purpose of a study group is to support candidates pursuing the APTD or CPTD credential through interaction with peers and SMEs. Study groups are not courses designed to teach the material or fully prepare members to take an exam. Study groups should be viewed as a supplement to members' individual studies. One of the more important but often overlooked functions of a study group is for members to provide emotional support and encouragement to one another in their pursuit of a shared goal.

### Study Group Leadership Responsibilities

Study groups need a leader to coordinate group activities and provide continuity between meetings. While there are multiple ways to structure and manage study groups (see below), we recommend that one person have overall accountability for the group. Leadership responsibilities typically include:

- Inviting participants and convening the group
- Coordinating logistics of the venue or virtual platform to be used
- Being aware of the study resources available for candidates
- Planning the overall outline to guide the topics covered during each session
- Recruiting and briefing SMEs to present various topics
- Occasionally presenting content to the group
- Facilitating meetings to keep participants engaged and respectful of one another
- Getting answers to questions that go unanswered during study group sessions

### Study Group Member Responsibilities

Study group members are responsible for their learning. They should be expected to:

- Do the prework assigned for each session.
- Come prepared with questions and insights on the assigned material.
- Share favorite resources or materials that may be helpful to the group as a whole.
- Be attentive during sessions and remove unrelated distractions to allow for full participation.
- Be ready to share responsibility for presenting or facilitating at select meetings.
- Treat all members with empathy and respect.

### Study Group Structure

Most study groups are managed in one of these ways:

1) **Planning Committee:** Larger groups (12 or more) typically have a planning committee to handle leadership responsibilities. The planning committee chair may or may not be involved in leading study group meetings. The planning committee may have different individuals who handle logistics, recruit SMEs, plan the content, and facilitate the meetings.

2) **Leader-Led:** Small- to medium-sized groups (six to 12 members) often have one leader who handles many of the leadership responsibilities but delegates tasks to group members.

3) **Member-Led:** Smaller, more informal groups (fewer than six members) typically share leadership responsibilities among group members. Even in these cases, an informal leader can take the lead to coordinate activities and ensure consistency with other chapter-hosted programs and meetings.

### Study Group Meeting Format

Study group meeting agendas usually include content reviews, Q&As, group discussions, sharing of resources, and reviews of the assignments for upcoming meetings. Group size typically influences the format of study group meetings in these ways:

- **Fewer Than Six Members:** Meetings are often less formal weekly check-ins with members discussing questions about the assigned topics. Members may take turns providing a quick review of assigned topics, discussing the key points gleaned from their reading, and sharing resources they found to be most helpful. Videos and podcasts may be used in lieu of SME presentations.
- **Six to 11 Members:** The needs of the members typically dictate the content of the meetings. Members often take responsibility for presenting topics in which they are well-versed. As with smaller groups, videos and podcasts are valuable resources. SMEs may be recruited to discuss or present topics in which the group does not have resident expertise.

- **12 to 24 Members:** For groups of this size, there is typically a more formal meeting structure. SMEs or a combination of SMEs and group members are recruited to present topics covered at each meeting. A separate facilitator is often designated to keep the meeting on track, handle group discussions, and monitor group dynamics.

## Using Subject Matter Experts

The decision to use SMEs to present content at study group meetings is often dictated by the size of the group or ready access to those experts. If using SMEs is an option, consider the pros and cons before proceeding.

On the positive side, using SMEs to present content exposes and connects study group members to various experts. Most study groups do not have expertise on all capabilities within their ranks, so using SMEs helps fill those knowledge gaps. On the negative side, SMEs do not always cover the required content and can lecture rather than engage the group. Members can undervalue their collective knowledge when SMEs present, leading to less participation and sharing. Having study group members present the material is also an excellent way for members to cement their learning by teaching the material. **Appendix D** includes tips on selecting and working with presenters.

## GETTING STARTED

### Gauging Interest

Running a study group requires time and resources. Before you commit to forming one, ensure there is adequate interest to undertake the effort. Before deciding upon timing or format, survey potential members. Here are some useful questions to ask:

- Are you planning to pursue the APTD or CPTD certification are you planning to pursue?
- What is your timing for completing the process? Within the next three months? Six months? Nine months? One year?
- Do you have a specific testing window to take the exam in mind?
- Are you interested in participating in a study group?
- Are you a member of a local ATD chapter that might be willing to support a study group?
- Do you prefer a face-to-face group or virtual group?
- Would you be willing to pay to participate in the study group?
- What time of day or day of week would you prefer to meet?
- Would you be willing to present on a topic(s) as part of the group?
- Would you be willing to take a turn facilitating the group?
- What areas of expertise or capabilities would you feel comfortable presenting to the group?
- Do you know any subject matter experts (SMEs) who may be willing to present to the group?
- Which capabilities are your weakest areas?

### Timing

Most study groups have sessions that run between 12 and 14 weeks with weekly two-hour meetings. Sessions can be compressed by holding longer meetings or reducing the number of formal presentations. When planning study group timing, be aware of upcoming exam windows. Many people plan study groups in the three months leading up to an exam window and encourage group members to take the exam shortly after the study group ends. The most recent information on exam windows for the CPTD and APTD, respectively, can be found at [td.org/certification/cptd/exam](https://td.org/certification/cptd/exam) and [td.org/certification/new-aptid/exam](https://td.org/certification/new-aptid/exam).

### Live Versus Virtual Format

Recent events have made everyone more comfortable using video conferencing and virtual learning platforms. However, face-to-face meetings still provide benefits that are hard to duplicate in a virtual environment. In addition, there may be situations in which face-to-face meetings are preferable. For example, when study group members work in the same location, face-to-face meetings may enable members a break from daily work to focus on personal development. **Appendix E** includes tips on facilitating virtual study group meetings.

### Chapter Support

Study groups that are sponsored by employers or started by individual candidates face a number of challenges that ATD Chapter-sponsored study groups do not. Non-chapter supported study groups may not have ready access to virtual conferencing software, meeting facilities, email marketing, a website, volunteers or other resources to help to publicize and manage the group. One solution to this problem is to reach out to a local ATD chapter to determine if it already supports a study group or would be willing to help support a new one. A list of current ATD chapters can be found here: [td.org/chapter-locator](https://td.org/chapter-locator).

### Working with ATD Certification Institute

For those interested in forming a study group, contact the ATD Certification Institute staff at [certification@td.org](mailto:certification@td.org) to ask how they can help. ATD CI staff cannot run study groups but they may be able to help find others who are interested in participating in a study group in your area or time zone. Messages can also be posted in one of the LinkedIn groups for APTD and CPTD Candidates (see page 7) to gauge interest in a study group. The ATD CI staff may also be aware of useful free resources and discounts that are available for groups.

### Study Group Evaluation

We recommend that you evaluate your study group sessions using simple online surveys. **Appendix F** includes sample questions that could be used to evaluate individual meetings and the overall study group experience.

### Feedback on Study Group Guide

To assist us in providing support to study groups, please complete this short survey after you have completed a study group cycle. We have listed the questions below, but you can find the survey on our website: [https://atdorg.formstack.com/forms/study\\_group\\_feedback](https://atdorg.formstack.com/forms/study_group_feedback)

## ESSENTIAL RESOURCES FOR STUDY GROUP LEADERS

Once the decision has been made that a study group should be formed, the first step is to gather the resources needed to develop a plan.

- 1. Candidate Handbook(s):** Every candidate pursuing a credential should download a copy of the Candidate Handbook. Study group leaders should download the handbook(s) and carefully review them. The APTD and the CPTD handbooks can be downloaded from [td.org/certification/active-candidates](https://td.org/certification/active-candidates) where many useful documents are posted.
- 2. Study Planning Guide:** Study planning guides for individuals who are preparing for APTD or CPTD exams can be found on the active candidates page. The guides include content outlines, sample study plans, a paper-based assessment tool, sample questions, study tips, and a reference resource list.
- 3. Content Outline:** The content outline for both credentials can be found in the Candidates Handbooks and can be downloaded from [td.org/certification/cptd/exam](https://td.org/certification/cptd/exam) and [td.org/certification/new-aptd/exam](https://td.org/certification/new-aptd/exam)
- 4. ATD Talent Development Capability Model:** The ATD Talent Development Capability Model, the foundation for both credentials, can be found on ATD's website at [td.org/capability-model](https://td.org/capability-model). The interactive site includes a self-assessment tool that allows users to rate their knowledge and skills against the capability model. Study group leaders should ask members to complete the self-assessment before the first meeting to gauge the areas of their strengths and weaknesses. Through the Learning Plan module, group members may choose the APTD or CPTD Learning Path and compare their self-assessment against just the statements that are tested on the certification exam.
- 5. Talent Development Body of Knowledge:** The TDBoK ([td.org/tdbok](https://td.org/tdbok)) contains content on the capabilities covered in the ATD Talent Development Capability Model. The TDBoK is a general resource for talent development professionals. Unlike the prior ATD learning system, it is not designed as a study tool and should not be the only resource used to prepare.
- 6. ATD Website:** ATD's website contains the latest information about both credentials. You can find details about eligibility, exam formats, and how to prepare and apply here:
  - [td.org/certification/cptd/introduction](https://td.org/certification/cptd/introduction)
  - [td.org/certification/new-aptd/introduction](https://td.org/certification/new-aptd/introduction)
- 7. Capabilities for Talent Development:** This book contains more detail about the Capability Model and describes the research behind the model. It is available for \$25–30 from ATD's website at [td.org/books/capabilities-for-talent-development](https://td.org/books/capabilities-for-talent-development).
- 8. LinkedIn Group(s):** ATD supports LinkedIn groups for APTD and CPTD candidates. Information about new resources, upcoming webcasts, and important announcements are posted in these LinkedIn groups.
  - **APTD:** [linkedin.com/groups/8660635/](https://linkedin.com/groups/8660635/)
  - **CPTD:** [linkedin.com/groups/8896013/](https://linkedin.com/groups/8896013/)
- 9. Sample Questions:** Sample exam questions developed for the new APTD and CPTD exams can be accessed from the ATD website at [td.org/certification/sample-questions](https://td.org/certification/sample-questions). The sample questions should not be viewed as a diagnostic or to gauge readiness for the exam.
- 10. Preparation Courses:** At the time of this writing, there are on-demand courses available to candidates preparing for the APTD and CPTD exams. Both are designed to review content contained on the exams as well as provide study tips. Details on available courses can be found at [td.org/certification/preparation](https://td.org/certification/preparation). While the courses are on-demand, a facilitator monitors the discussion board to answer questions from course participants.

## CREATING A STUDY GROUP PLAN

Study group leaders should use the exam content outline as a starting point to create a study group plan. The content outlines for both credentials include the knowledge and skill statements that will be covered on the exam. The content outlines can be found on the [active candidates page](#) and in the [Candidate Handbook](#).

Ideally, a study group plan should include the topics to be covered at each session; the assigned prework; the date, time, and location of the study group meeting; and the speaker and facilitator who will be supporting each study group session. The prework assigned for each meeting should not be limited to readings from the TDBoK. While it's an important resource, exam questions were not developed using the TDBoK as the key reference, so limiting study to the TDBoK will not adequately prepare members for the exam. Instead, prework should be drawn from the recommended reference resource list found in the [Candidate Handbook](#) as well as from trusted sources from study group members.

### APTD VERSUS CPTD

The APTD and CPTD cover a similar range of capabilities, but the CPTD exam covers the topics in more depth. For example, in the Career & Leadership Development capability statements shown below, the APTD tests basic knowledge while the CPTD tests higher-level skills that would be required for more senior professionals. **Because the specific knowledge and skill statements tested on the exams are quite different, we don't recommend running a joint APTD and CPTD study group at this time.**

APTD: Career & Leadership Development	CPTD: Career & Leadership Development
<ul style="list-style-type: none"><li>▪ Knowledge of leadership development practices and techniques (for example, formal training programs, job rotation, and coaching and mentoring).</li><li>▪ Knowledge of career development methods and techniques (for example, job rotations and stretch assignments).</li></ul>	<ul style="list-style-type: none"><li>▪ Skill in sourcing, designing, building, and evaluating leadership development experiences.</li><li>▪ Knowledge of how to develop and implement qualification programs.</li></ul>

A high-level schedule designed designed around weekly two-hour meetings held during 14 weeks is included below. **Appendix B** contains a detailed sample CPTD study group outline and **Appendix C** includes sample study group meeting agendas.

## Study Group Outline

### WEEK 1: ORIENTATION

Introduction to the credential(s) and the ATD Capability Model, study group structure, and study resources. Study group members should be asked to complete the gap assessment in the Study Planning Guide or to take the [self-assessment](#) on the ATD website and bring their results to the first meeting.

WEEK 2: PERSONAL CAPABILITIES (PART 1)

- Communication
- Collaboration and Leadership
- Emotional Intelligence and Decision Making

WEEK 3: PERSONAL CAPABILITIES (PART 2)

- Cultural Awareness and Inclusion
- Project Management
- Compliance and Ethical Behavior

WEEK 4: LEARNING SCIENCES AND TRAINING DELIVERY

- Learning Sciences
- Training Delivery and Facilitation

WEEK 5: INSTRUCTIONAL DESIGN

- Instructional Design

WEEK 6: TECHNOLOGY AND KNOWLEDGE MANAGEMENT

- Technology Application
- Knowledge Management

WEEK 7: LEADERSHIP DEVELOPMENT AND COACHING

- Career and Leadership Development
- Coaching

WEEK 8: EVALUATING IMPACT

- Evaluating Impact
- Business Insight

WEEK 9: CONSULTING AND CHANGE MANAGEMENT

- Consulting and Business Partnering
- Change Management

WEEK 10: ORGANIZATION DEVELOPMENT

- Organization Development and Culture

WEEK 11: TALENT STRATEGY & MANAGEMENT

- Talent Strategy & Management

WEEK 12: PERFORMANCE IMPROVEMENT

- Performance Improvement

WEEK 13: DATA ANALYTICS AND FUTURE READINESS

- Data and Analytics
- Future Readiness

WEEK 14: WRAP-UP

## APPENDIX A: THE APTD AND CPTD CREDENTIALS

The Associate Professional in Talent Development (APTD) and the Certified Professional in Talent Development (CPTD) are grounded in research that produced the new [ATD Capability Model](#). The APTD is designed for TD professionals with at least three years of experience, and the CPTD is appropriate for those with at least five years of experience in the field.

### Eligibility Requirements

APTD and CPTD candidates must fulfill work experience and professional development requirements before being eligible to apply for either program. Professional development must relate to capabilities included in the Professional and Organizational domains of the [ATD Talent Development Capability Model](#) to qualify.

**Associate Professional in Talent Development (APTD):** Applicants need least three years of experience in talent development and 28 hours of professional development completed in the last three years. An ATD Master's program completed within the past three years satisfies the professional development requirement.

**Certified Professional in Talent Development (CPTD):** Applicants need at least five years of experience in talent development and 60 hours of professional development completed in the last five years. A current APTD credential or an ATD Master's program completed within the past five years satisfies the full professional development requirement.

More details about eligibility can be found in the [Candidate Handbooks](#). A short video on professional development requirements can be found [here](#). **Appendix G** contains additional detail about what type of activities satisfy the professional development requirement.

### Exam Formats

The [APTD exam](#) is a 2-hour knowledge exam with 125 multiple choice questions covering a subset of the knowledge and skill statements included in the ATD Talent Development Capability Model.

CPTD candidates must pass [one exam](#) that covers a subset of the knowledge and skills from the capability model focusing on skills application and decision-making for more experienced professionals. It includes a mix of multiple choice and case management style questions that test the candidates' abilities to apply knowledge on the job. Candidates will have three hours to complete the exam. More detail on the exam format can be found in the [Study Planning Guide](#) posted on the ATD website.

### Exam Windows

Beginning in 2021, the CPTD and APTD exams will be given every other month, alternating between the two credentials. For example, the APTD will be offered in January and the CPTD in February and every other month thereafter. In 2020, the pilot of the new CPTD exam will take place in August and September. There will be one additional window in 2020, November 18–December 23, 2020, in which to take the new CPTD exam. The most recent testing windows for the [APTD](#) and [CPTD exams](#) can be found on the ATD website.

### Application Process

To be considered an active candidate, applicants must apply and pay their exam fees through the [ATD Certification Portal](#). Once the application has been submitted, candidates will have 18 months in which to complete the exam. The 18-month period starts on the date the candidate applies and pays for the exam. A step-by-step guide for how to apply for a credential can be found on the active candidates page or can be downloaded from the [APTD](#) or [CPTD](#) apply pages.

## APPENDIX B: SAMPLE CPTD STUDY GROUP PLAN

This sample CPTD study group plan is designed for groups using a formal study group format. Groups may wish to combine topics based on the availability of speakers or their group's needs.

Pework assignments are meant to be illustrative and not prescriptive. This sample plan provides suggestions of the types of resources that may be used for study purposes but should not be viewed as the definitive list. For convenience, the numbering of the skill statements correlates the sections of the TDBoK, but the TDBoK should not be viewed as the only resource to be used for study.

CPTD Study Group Plan		
Week 1: Orientation: Date/Time/Location	Presenter	Facilitator
<p><b>Topics:</b> Overview of study group schedule, how the study group will function, an introduction to the ATD Capability Model and the ATD CI credentials, and the study resources available.</p> <p><b>Pework:</b> Read CPTD Candidate Handbook; complete self-assessment of the ATD Capability Model at <a href="http://td.org/capability-model">td.org/capability-model</a> and choose the CPTD Learning Path to compare against the CPTD exam content; bring list of top five areas of strengths and weaknesses.</p>	<b>Tina Trainor</b>	<b>Joe Smith</b>
Week 2: Personal Capabilities (Part 1): Date/Time/Location		
<p><b>Communication</b></p> <p>1.1.3 Skill in using communication strategies that inform and influence audiences.</p> <p>1.1.5 Skill in conceiving, developing, and delivering information in various formats and media.</p> <p>1.1.6 Skill in applying verbal, written, and nonverbal communication techniques.</p>		
<p><b>Emotional Intelligence and Decision Making</b></p> <p>1.2.1 Knowledge of theories of emotional intelligence.</p>		
<p><b>Collaboration and Leadership</b></p> <p>1.3.1 Knowledge of theories, methods, and techniques to build and manage professional relationships (for example, group dynamics, teamwork, shared experience, and negotiation).</p> <p>1.3.5 Knowledge of conflict management techniques.</p> <p>1.3.10 Knowledge of theories of leadership (for example, transformational, inclusive, and situational).</p>		
<p><b>Pework:</b></p> <p>Review relevant sections of the TDBoK that correlate to the topics to be covered.</p> <p><b>Bring to meeting:</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> List of key insights and favorite resources on these topics outside TDBoK</li> <li><input type="checkbox"/> List of questions based on your reading and knowledge of the topics</li> </ul>		

Week 3: Personal Capabilities (Part 2): Date/Time/Location	Presenter	Facilitator
<p><b>Cultural Awareness and Inclusion</b></p> <p>1.4.6 Skill in integrating diversity and inclusion principles in talent development strategies and initiatives.</p>		
<p><b>Project Management</b></p> <p>1.5.3 Skill in evaluating and prioritizing implications, risks, feasibility, and consequences of potential activities.</p> <p>1.5.6 Skill in establishing, monitoring, and communicating progress toward the achievement of goals, objectives, and milestones.</p>		
<p><b>Compliance and Ethical Behavior</b></p> <p>1.6.3 Knowledge of laws, regulations, and ethical issues related to the access and use of information (for example, intellectual capital, personally identifiable information, and customer data).</p>		
<p><b>Potential Prework:</b></p> <ul style="list-style-type: none"> <li>• Silveira, E and Walters, J. 2017. <i>TD at Work</i>, “<a href="#">Building Blocks of Workplace Inclusion</a>”. Alexandria, VA: ATD Press.</li> <li>• Partridge, V.B., L. Russell, and L.B. Swindling. 2014. “The Legal Aspects of Training: Protect What Is Yours and Avoid Taking What Belongs to Someone Else,” and “Project Management for T&amp;D Professionals: Five Steps to Increase Your Effectiveness.” From <a href="#">ASTD Handbook, 2nd Edition, edited by E. Biech</a>. Alexandria, VA: ATD Press.</li> </ul> <p>Bring to the meeting:</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Questions for the presenter</li> <li><input type="checkbox"/> List of insights and favorite resources on these topics outside the TDBoK</li> </ul>		
<b>2. Building Professional Capability (45 Percent)</b>		
Week 4: Training Delivery and Learning Science: Date/Time/Location	Presenter	Facilitator
<p><b>Learning Sciences</b></p> <p>2.1.1 Knowledge of the foundational learning theories of behaviorism, cognitivism, and constructivism.</p> <p>2.1.3 Knowledge of theories and models of adult learning (for example, Knowles’ Adult Learning Theory, Bloom’s Taxonomy, Gagne’s Nine Levels of Learning, Mager’s Criterion-Referenced Instruction Approach, social and collaborative learning, and experiential learning).</p>		
<p><b>Training Delivery and Facilitation</b></p> <p>2.3.3 Knowledge of facilitation methods and techniques.</p>		
<p><b>Potential Prework:</b></p> <ul style="list-style-type: none"> <li>• Biech, E. 2017. “What Is the Science and Art of Training,” and “How Do You Learn?”. From <a href="#">The Art and Science of Training</a>. Alexandria, VA: ATD Press.</li> <li>• Skolovitch, H. D., and E. J. Keeps. 2011. “A Five Step Model for Creating Terrific Training Sessions” and “Training Approaches and a Cornucopia of Learning Activities.” From <a href="#">Telling Ain’t Training</a>, 2nd Edition. Alexandria, VA: ATD Press.</li> </ul> <p><b>Bring to the meeting:</b></p> <ul style="list-style-type: none"> <li>• Questions for the presenter</li> <li>• List of insights and favorite resources on these topics outside the TDBoK</li> <li>• Members can be assigned to review one of the texts listed above and report back</li> </ul>		

Week 5: Instructional Design: Date/Time/Location	Presenter	Facilitator
<p><b><u>Instructional Design</u></b></p> <p>2.2.1 Skill in selecting and aligning delivery options and media for training and learning events to the desired learning or behavioral outcomes.</p> <p>2.2.4 Skill in developing learning and behavioral outcome statements.</p> <p>2.2.6 Skill in designing blueprints, schematics, and other visual representations of learning and development solutions (for example, wireframes, storyboards, and mock-ups).</p> <p>2.2.12 Skill in designing and developing learning assets (for example, role plays, self-assessments, training manuals, job aids, and visual aids that align to a desired learning or behavioral outcome).</p>		
<p><b><u>Potential Prework:</u></b></p> <ul style="list-style-type: none"> <li>• Hodell, C. 2015. “Objectives,” “Design Plan,” and “Lesson Plan.” From <a href="#">ISD From the Ground Up</a>, 4th Edition. Alexandria, VA: ATD Press.</li> <li>• Dirksen, J. 2015. <a href="#">Design for How People Learn</a>, 2nd Edition. San Francisco: New Riders Press.</li> <li>• Skolovitch, H. D., and E. J. Keeps. 2011. <a href="#">“Telling Ain’t Training</a>, 2nd Edition. Alexandria, VA: ATD Press.</li> </ul> <p><b><u>Bring to the meeting:</u></b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Questions for the presenter</li> <li><input type="checkbox"/> List of insights and favorite resources on these topics outside the TDBoK</li> <li><input type="checkbox"/> Members can be review one of the texts listed above and report back</li> </ul>		
<p><b><u>Week 6: Technology and Knowledge Management: Date/Time/Location</u></b></p>		
<p><b><u>Technology Application</u></b></p> <p>2.4.4 Skill in identifying, selecting, and implementing learning technologies (for example, using evaluative criteria and identifying appropriate applications in an instructional environment).</p> <p>2.4.1 Skill in selecting, integrating, managing, and maintaining learning platforms (for example, learning management systems, knowledge management systems, and performance management systems).</p>		
<p><b><u>Knowledge Management</u></b></p> <p>2.5.7 Skill in curating instructional content, tools, and resources (for example, researching, evaluating, selecting, and assembling publicly available online courseware).</p> <p>2.5.3 Skill in designing and implementing knowledge management strategy.</p>		
<p><b><u>Potential Pre-Work:</u></b></p> <ul style="list-style-type: none"> <li>• Udall, C. and G. Woodill. 2019. <a href="#">Shock of the New</a>. Alexandria, VA: ATD Press.</li> <li>• Betts, B. and M. Rosenberg. 2014. “Curation of Content” and “Knowledge Management: An Introduction for T&amp;D Professionals.” From <a href="#">ASTD Handbook, 2nd Edition, edited by E. Beich</a>. Alexandria, VA: ASTD Press.</li> </ul> <p><b><u>Bring to the meeting:</u></b></p> <ul style="list-style-type: none"> <li>• Questions for the presenter</li> <li>• List of insights and favorite resources on these topics outside the TDBoK</li> <li>• Reviews of individual chapters or sections of the books mentioned above</li> </ul>		

<b>Week 7: Leadership Development and Coaching: Date/Time/Location</b>	Presenter	Facilitator
<p><b>Career and Leadership Development</b></p> <p>2.6.8 Skill in sourcing, designing, building, and evaluating leadership development experiences.</p> <p>2.6.6 Knowledge of how to develop and implement qualification programs.</p>		
<p><b>Coaching</b></p> <p>2.7.2 Skill in helping individuals or teams identify goals, develop realistic action plans, seek development opportunities, and monitor progress and accountability.</p> <p>2.7.3 Skill in coaching supervisors and managers on methods and approaches for supporting employee development.</p>		
<p><b>Potential Prework:</b></p> <ul style="list-style-type: none"> <li>• Axelrod, W., J. Brittain Leslie, and N. Petrie. 2014. “Helping Managers Develop Their Employees” and “Developing Leaders for the Future.” From <a href="#">ASTD Handbook, 2nd Edition, edited by E. Beich</a>. Alexandria, VA: ASTD Press.</li> <li>• Clark, L. 2015. “Building a Leadership Development Strategy.” From <a href="#">Talent Management Handbook, edited by T. Bickham</a>. Alexandria, VA: ATD Press.</li> </ul> <p><b>Bring to the meeting:</b></p> <ul style="list-style-type: none"> <li>• Questions for the presenter</li> <li>• List of insights and favorite resources on these topics outside the TDBoK</li> <li>• Reviews for individual chapters or sections of the books mentioned above</li> </ul>		
<b>Week 8: Evaluating Impact: Date/Time/Location</b>		
<p><b>Evaluating Impact</b></p> <p>2.8.1 Knowledge of models and methods to evaluate the impact of learning and talent development solutions.</p> <p>2.8.4 Skill in creating data collection tools, for example questionnaires, surveys and structured interviews.</p> <p>2.8.3 Skill in identifying and defining individual and organizational outcome metrics based on evaluation strategy and business objectives of a solution.</p>		
<p><b>Business Insight</b></p> <p>3.1.7 Skill in creating business cases for talent development initiatives using economic, financial, and organizational data.</p> <p>3.1.6 Skill in managing budgets and resources</p>		
<p><b>Potential Prework:</b></p> <ul style="list-style-type: none"> <li>• Kirkpatrick, J. and W. Kayser Kirkpatrick. 2016. “Developing an Effective Evaluation Strategy” and “Data Collection Guidelines, Methods, and Tools.” From <a href="#">Kirkpatrick’s Four Levels of Training Evaluation</a>. Alexandria, VA: ATD Press.</li> <li>• Oliver, L. 2017. <a href="#">“Preparing &amp; Defending Your Training Budget.”</a> <i>TD at Work</i>. Alexandria, VA: ATD Press.</li> </ul> <p><b>Bring to the meeting:</b></p> <ul style="list-style-type: none"> <li>• Questions for the presenter</li> <li>• List of insights and favorite resources on these topics aside from the TDBoK</li> <li>• Reviews of individual chapters or sections of the books mentioned above</li> </ul>		

<b>3. Impacting Organizational Capability (35 Percent)</b>		
<b>Week 9: Change Management and Consulting Skills: Date/Time/Location</b>	<b>Presenter</b>	<b>Facilitator</b>
<p><b><u>Change Management</u></b></p> <p>3.6.1 Knowledge of change management theories and models (for example, Lewin, Kotter, Bridges' Transition Model; Kubler-Ross Change Curve; and Appreciative Inquiry).</p>		
<p><b><u>Consulting and Business Partnering</u></b></p> <p>3.2.5 Skill in synthesizing information to formulate recommendations or a course of action to gain agreement, support, and buy-in from stakeholders.</p> <p>3.2.1 Skill in establishing and managing organizational and business partnerships and relationships.</p> <p>3.2.2 Skill in partnering with other organizational units to provide guidance on departmental or organizational talent requirements.</p> <p>3.2.8 Skill in identifying, minimizing, and overcoming organizational barriers to implementing talent development solutions and strategies.</p>		
<p><b><u>Potential Prework:</u></b></p> <ul style="list-style-type: none"> <li>• Barnes, K., D. Booher, R. Kaufman, P. McLagan, and B. Scott. 2014. "How Do Needs Assessments Align to the Bottom Line," "Consulting on the Inside," "Securing Executive Support: Presenting to the C-Suite," and "The Training and Development Professional's Role in Guiding Change." From <a href="#">ASTD Handbook, 2nd Edition, edited by E. Biech</a>. Alexandria, VA: ASTD Press.</li> <li>• Anderson, C. S., and A. G. Zaballero. 2015. "Organization Development and Change Models." From <a href="#">Organization Development Fundamentals, edited by W. J. Rothwell</a>. Alexandria, VA: ATD Press.</li> </ul> <p><b><u>Bring to the meeting:</u></b></p> <ul style="list-style-type: none"> <li>• Questions for the presenter</li> <li>• List of insights and favorite resources on these topics outside the TDBoK</li> <li>• Reviews for individual chapters or sections of the books mentioned above</li> </ul>		
<b>Week 10: Organization Development: Date/Time/Location</b>	<b>Presenter</b>	<b>Facilitator</b>
<p><b><u>Organization Development and Culture</u></b></p> <p>3.3.2 Skill in designing and implementing organizational development strategy.</p> <p>3.3.3 Knowledge of theories and frameworks related to the design, interaction, and operation of social, organizational, and informational systems (for example, Systems Thinking, Open Systems Theory, Chaos and Complexity Theory, Network Theory, and Action Research).</p> <p>3.3.4 Skill in identifying formal and informal relationships, hierarchies, and power dynamics in an organization.</p> <p>3.3.8 Skill in creating a culture that encourages and creates opportunities for dialogue and feedback between individuals and groups (for example, designing collaborative work practices and spaces, and role-modeling effective feedback techniques).</p> <p>3.3.11 Skill in assessing and evaluating employee engagement.</p> <p>3.3.12 Skill in designing and implementing employee engagement strategy.</p>		

<p><b>Potential Prework:</b></p> <ul style="list-style-type: none"> <li>• Senge, P. 2006. <a href="#"><i>The Fifth Discipline: The Art &amp; Practice of the Learning Organization</i></a>. New York: Doubleday.</li> <li>• Anderson, C.S., C.M. Corn, and C. Hyun Park. 2015. “The Organization Development Process” and “Implementation of Organization Development.” From <a href="#"><i>Organization Development Fundamentals</i></a>, edited by W. Rothwell. Alexandria, VA: ATD Press.</li> </ul> <p><b>Bring to the meeting:</b></p> <ul style="list-style-type: none"> <li>• Questions for the presenter</li> <li>• List of insights and favorite resources on these topics aside from the TDBoK</li> <li>• Reviews of individual chapters or sections of the books mentioned above</li> </ul>		
<p><b>Week 11: Talent Strategy and Management: Date/Time/Location</b></p>	<p><b>Presenter</b></p>	<p><b>Facilitator</b></p>
<p><b><u>Talent Strategy and Management</u></b></p> <p>3.4.16 Skill in designing and implementing performance management strategy.</p> <p>3.4.3 Skill in developing a talent strategy that aligns to organizational strategy to influence organizational outcomes in a positive direction.</p> <p>3.4.4 Skill in designing and implementing strategic plans for talent development projects, programs, and functions.</p> <p>3.4.5 Skill in identifying anticipated constraints or problems affecting talent development initiatives (for example, resource deficiencies or lack of support).</p> <p>3.4.6 Skill in establishing and executing a marketing strategy to promote talent development.</p> <p>3.4.7 Skill in designing and implementing communication strategy to drive talent management objectives.</p> <p>3.4.8 Skill in communicating how talent development strategies and solutions support the achievement of targeted business and organizational results.</p> <p>3.4.9 Skill in communicating the value of lifelong learning and professional development.</p>		
<p><b><u>Potential Prework:</u></b></p> <ul style="list-style-type: none"> <li>• Buckingham, M., C. Dinsell, M. Peters, and W. A. Schiemann. 2015. “Adopting a More Dynamic Approach to Performance Management,” <i>Engaging Leaders in Performance Management</i>,” and <i>StandOut: Next-Generation Performance Management</i>.” From <a href="#"><i>Talent Management Handbook</i></a>, edited by T. Bickham. Alexandria, VA: ATD Press.</li> <li>• Gaul, P. 2019. “<a href="#"><i>A Strategic Approach to Talent Development</i></a>.” <i>TD at Work</i>. Alexandria, VA: ATD Press.</li> <li>• Senge, P. 2006. <a href="#"><i>The Fifth Discipline: The Art &amp; Practice of the Learning Organization</i></a>. New York: Doubleday.</li> </ul> <p><b>Bring to the meeting:</b></p> <ul style="list-style-type: none"> <li>• Questions for the presenter</li> <li>• List of insights and favorite resources on these topics aside from the TDBoK</li> <li>• Reviews of individual chapters or sections of the books mentioned above</li> <li>• Insights on a wiki or other shared document that members can access</li> </ul>		

Week 12: Performance Improvement: Date/Time/Location	Presenter	Facilitator
<p><b>Performance Improvement</b></p> <p>3.5.6 Skill in designing and implementing performance support systems and tools (for example instructional, resources, data, process models, job aids, and expert advice).</p> <p>3.5.5 Skill in designing and developing performance improvement solutions to address performance gaps.</p> <p>3.5.4 Skill in conducting performance analysis to identify goals, gaps, or opportunities.</p> <p>3.5.7 Skill in conducting analysis of systems to improve human performance (for example, determining how organizations learn, closing knowledge or skill gaps, and addressing human factors issues).</p> <p>3.5.1 Knowledge of theories, models, and principles of human performance improvement.</p>		
<p><b>Potential Prework:</b></p> <ul style="list-style-type: none"> <li>• Senge, P. 2006. <i>The Fifth Discipline: The Art &amp; Practice of the Learning Organization</i>. New York: Doubleday.</li> <li>• Shank, P. 2014. "Supporting Worker Performance in the Workplace." From <i>ASTD Handbook, 2nd Edition, edited by E. Biech</i>. Alexandria, VA: ATD Press.</li> </ul> <p><b>Bring to the meeting:</b></p> <ul style="list-style-type: none"> <li>• Questions for the presenter</li> <li>• List of insights and favorite resources on these topics outside the TDBoK</li> <li>• Reviews of individual chapters or sections of the books mentioned above</li> </ul>		
Week 13: Data Analytics and Future Readiness: Date/Time/Location	Presenter	Facilitator
<p><b>Data and Analytics</b></p> <p>3.7.6 Skill in selecting and using data visualization techniques (for example, flow charts, graphs, plots, word clouds, and heat maps).</p> <p>3.7.3 Skill in identifying stakeholders' needs, goals, requirements, questions, and objectives to develop a framework and plan for data analysis.</p> <p>3.7.4 Skill in analyzing and interpreting results of data analyses to identify patterns, trends, and relationships among variables.</p> <p>3.7.2 Skill in gathering and organizing data from internal and external sources in logical and practical ways to support retrieval and manipulation.</p>		
<p><b>Future Readiness</b></p> <p>3.8.3 Knowledge of techniques to promote, support, and generate innovation and creativity (for example, design thinking, brainstorming, and ideation).</p> <p>3.8.1 Knowledge of internal and external factors that influence talent development (for example, organizational and business strategies, availability of labor, developments in other industries, societal trends, and technological advances).</p>		

<p><b>Potential Prework:</b></p> <ul style="list-style-type: none"> <li>• Biech, E. 2018. “The Workplace Future,” “The Workforce of the Future,” “Talent Development Future Trends,” and “Guiding Your Organization’s Future.” From <a href="#">ATD Foundations of Talent Development</a>. Alexandria, VA: ATD Press.</li> <li>• Glynn, K and D. Tolsma. 2017. “<a href="#">Design Thinking Meets ADDIE.</a>” <i>TD at Work</i>. Alexandria, VA: ATD Press.</li> <li>• Udall, C. and G. Woodill. 2019. <a href="#">Shock of the New</a>. Alexandria, VA: ATD Press.</li> </ul> <p><b>Bring to the meeting:</b></p> <ul style="list-style-type: none"> <li>• Questions for the presenter</li> <li>• List of insights and favorite resources on these topics outside the TDBoK</li> <li>• Reviews of individual chapters or sections of the books mentioned above</li> <li>• Insights on a wiki or other shared document that members can access</li> </ul>		
<p><b>Week 14 Wrap-Up</b></p>		<p>Facilitator</p>
<p><b>Prework:</b></p> <ul style="list-style-type: none"> <li>• Update capability model self-assessment at <a href="http://td.org/capability-model">td.org/capability-model</a>.</li> <li>• Identify areas of greatest concern.</li> <li>• Bring questions that are still outstanding.</li> </ul>		

## APPENDIX C: SAMPLE STUDY GROUP AGENDAS

### **Standard Study Group Meeting Agenda: Two-Hour Meeting**

*Typical agenda for medium to large study group with speaker/presenter*

#### **Welcome (5 Minutes)**

- Introduction of any new members
- Reminder of ground rules and purpose of the group

#### **Opener (15 Minutes)**

Before the content review, pose a question or idea to the group such as:

- Share one thing you have learned related to the topic at hand since the last meeting.
- Share a study technique you have used successfully in the past week.
- How have you used content reviewed at the last meeting at work or in your personal life?
- Share a resource or reference material you have discovered since the last meeting.
- How are you doing with your studying? How are you feeling about the process so far?

#### **Content Review (1 Hour)**

- Speaker or study group members presents content review

#### **Q&A: (30 Minutes)**

- Questions for the speaker and other study group members
- Possible discussion questions:
  - How does this content relate to your daily work?
  - Is the content presented consistent with how you currently do your work?
  - How can you apply these concepts at home or work in the coming week?

#### **Assignment for Next Meeting (10 Minutes)**

- Review prework and any other assignments for the coming week.
- Touch base on how the group is going.
- Identify the “parking lot” questions to be answered by the next meeting.

### **Standard Meeting Agenda: Three-Hour Meeting**

*Typical agenda for larger groups or those with compressed schedules (eight weeks)*

- Similar agenda to shorter meeting, with additional time allotted for content review (30 minutes)
- Small group work such as tasking subgroups to research challenging questions or case studies

### **Small Study Group Meeting Agenda: One-Hour Meeting**

*Typical agenda for a smaller study group with weekly check-ins and no formal speakers*

- Brief check-in (5 minutes)
- Study group member assigned to facilitate the meeting reviews key points on the content and shares favored resources (30 minutes maximum)
- Members discuss what they learned from their assigned reading or viewing (10)
- Members raise questions they have about the reading or content review (10)
- Review assigned topic/reading for the following meeting (5)

## APPENDIX D: SELECTING AND WORKING WITH PRESENTERS

Most study group meeting agendas include time devoted to content review. SMEs, chapter volunteers, or study group members are typically tasked with presenting content to the group.

### Locating Subject Matter Experts

To locate speakers to cover the topics included in the content outline, study groups often use these strategies:

- Ask study group members if they are comfortable presenting on specific topics on the content outline.
- Ask study group members if they know any SMEs who may be willing to present to the group.
- Current CPTD and APTD credential holders can earn recertification points by presenting or assisting with a study group. Contact [recertification@td.org](mailto:recertification@td.org) for additional details on point values and qualifying activities. To find certified individuals you may:
  - Ask ATD CI staff to post a request to the LinkedIn group for CPTD and APTD certificants or to identify certified individuals who live in your area.
- Post a request in a LinkedIn group or other online forum related to the topic.
- Reach out to local ATD Chapters to determine if they have experts willing to speak to your group.
- Contact professional associations likely to have members with expertise in the specific topic area. For example, the OD Network for Organizational Development experts.
- Reach out to local college professors and instructors.
- Search the ATD website for authors who have contributed an article or blogged about the topic.

### Working With Presenters

To ensure the best experience for the speaker and study group, follow these guidelines when working with presenters:

- Designate a facilitator for each meeting, distinct from the presenter, who will keep the meeting on track, encourage participation, and facilitate discussions.
- Ensure that the speaker is clear about the topics to be covered by providing the portion of the content outline that correlates with their presentation.
- Gather questions and issues ahead of time that the group would like the presenter to address.
- Be clear about the amount of time the presenter will have to cover the material.
- Give the speaker a deadline by which to send slides or handouts.
- Review slides prior to the meeting to ensure that the content is consistent with what was requested.
- Stress that it is an experienced group that will likely have in-depth questions.
- Gauge the speaker's comfort level with the technology platform being used if it is a virtual session.
- Ask the speaker what audio-visual equipment or other comfort needs they may have if it is a face-to-face session.
- Share the group's ground rules with the speaker.
- Ask that the speaker actively engage the group.

## APPENDIX E: TIPS FOR FACILITATING VIRTUAL STUDY GROUP MEETINGS

For study groups that meet virtually, these tips can help the sessions run smoothly.

### **Recommendations for Facilitators:**

- Identify a facilitator for each meeting who distinct from the presenter. The facilitator can act as timekeeper, facilitate question and answer sessions, monitor the chat box, and encourage participation.
- Designate a study group member to monitor for technical problems and deal with background noise.
- Greet each participant by name as they join the meeting.
- Allow time for participants to check in at the beginning of the session, using an inciting statement such as, “Name one thing about the CPTD you learned since our last session.”
- Keep a list of participants in front handy and check names off each time someone speaks. Privately message quieter participants to draw them out or consider prompting broader participation by asking to hear from someone who hasn’t yet spoken.
- During discussions and Q&A, record information in a shared document to be provided to the group.
- Use a “parking lot” to record questions that go unanswered during the meeting and assign who will follow up on the question for the next session.
- When things go wrong, be mindful of “facilitator self-talk,” which tends to appear when something unexpected happens and may or may not be appropriate for the situation.
- If input is requested and silence is the response, that may mean that there is agreement, disagreement, or simply a lack of engagement. Without visual cues, the best way to be sure is to ask the members to vote, conduct a round-robin to request feedback, or take a poll.
- Send an email after the meeting to summarize the session and remind participants of the next scheduled session.

### **Speakers:**

- Ask speakers to login 30 minutes early to ensure that sound and video connections are working properly.
- Do a quick run through of the slides to ensure the speaker is comfortable with the technology platform.
- Remind speakers to engage the group on a regular basis. For a synchronous virtual session, speakers should engage participants at least every three to five minutes.
- Ask speakers to present from a quiet location with reliable internet and a clear phone line.

### **Participants:**

- Emphasize to participants the importance of joining the meeting five to 10 minutes prior to the start time to give everyone time to deal with any unanticipated connection problems before the session begins.
- Establish a messaging and cell phone policy to reduce distractions for study group members.
- Encourage members to use the audio and video feature of the platform.
- Ask study group members to actively participate verbally as well as using any online chat tools. Verbal interaction, asides, laughter, and spontaneous questions establish rapport and foster open dialogue.
- Ask members to identify themselves when they talk. “This is Tina Trainor. I agree that . . .” If they forget, ask them to say their name after they have finished. “That was a great point. Who was just speaking?”

## APPENDIX F: STUDY GROUP EVALUATIONS

### Evaluations After Each Session

We recommend short evaluations after each study group session covering questions such as:

**1. How clearly did the presenter explain the content?**

Not clearly at all \_\_\_\_\_ Very clearly

**2. How did the content compare to your level of understanding?**

Too basic \_\_\_\_\_ About right \_\_\_\_\_ Too advanced

**3. Please rate the following aspects of the speaker's presentation:**

\_\_\_\_\_ Poor \_\_\_\_\_ Excellent

Pace

Volume

Ability to engage the group

Understanding of the material

**4. How helpful was the group discussion component of the meeting?**

Not helpful at all \_\_\_\_\_ Extremely helpful

**5. What would you change about the study group format?**

**6. Are there unanswered questions you would like addressed at future meetings?**

### Evaluation at Close of Study Group

When the study group is over, we recommend a longer evaluation that includes questions such as:

**1. How well did the study group meeting your expectations?**

Did not meet expectations \_\_\_\_\_ Exceeded expectations

**2. What is the likelihood that you would recommend the study group to other candidates?**

Not at all likely \_\_\_\_\_ Somewhat likely \_\_\_\_\_ Highly likely

**3. How helpful was the study group to your exam preparation?**

Not helpful at all \_\_\_\_\_ Extremely helpful

**4. What was the most valuable aspect of the study group?**

**5. How can the study group be improved for future groups?**

**6. Where are you in the certification process?**

- I have not yet applied for the exam but plan to do so.
- I have applied but not yet scheduled an appointment.
- I have scheduled my testing appointment.
- I have taken the exam.
- I do not plan to take the exam.

## APPENDIX G: QUALIFYING PROFESSIONAL DEVELOPMENT ACTIVITIES

Courses, workshops, conferences, online programs, and webcasts provided by a reputable organization may all qualify for the professional development eligibility requirement. The two caveats to keep in mind are that the program must cover a topic included in the organizational or professional domains of the ATD Talent Development Capability Model (see list below) and may not include training on a proprietary program or method (such as Myers-Briggs or DiSC). For more detail on the skills and knowledge included under the capabilities listed below, see [td.org/capability-model](http://td.org/capability-model).

Qualifying Capabilities	
• Learning Science	• Business Insight
• Instructional Design	• Consulting & Business Partnering
• Training Delivery & Facilitation	• Organization Development & Culture
• Technology Application	• Talent Strategy & Management
• Knowledge Management	• Performance Improvement
• Career & Leadership Development	• Change Management
• Coaching	• Data & Analytics
• Evaluating Impact	• Future Readiness

**1) University Course:** A course taught at a university on a topic included in the ATD Talent Development Capability Model's professional or organizational domains. Courses for credit are worth 15 points per credit.

Example: **Organizational Learning:** Professional master's of education course. Examine organizational theory, structure and bureaucracy, organizations and their environments, human resources, politics, decision-making, leadership and organizational change.

**2) Employer-Sponsored Program:** A workshop or course sponsored by your employer will count if the topic covers a qualifying capability and taught by someone other than yourself. The number of hours is equal to the hours spent in direct instruction. Breaks, lunch, and networking do not qualify.

Example: **Agile Learning for Instructional Designers**—sponsored by your employer—two six-hours days of learning equal 12 points.

**3) Professional Conference, Courses, and Workshops:** A conference or educational program sponsored by a professional organization. The sessions devoted to qualifying capabilities can be counted toward professional development. Please list each day of the conference separately and include the number of hours that you attended sessions that day. Breaks, lunch, expo, and networking time does not qualify. If you are selected for audit, you will be asked to provide a list of the sessions that you attended.

Example: **ATD Annual Conference 2020:** Sessions related to capabilities listed above would qualify.

**4) Local Chapter Workshops:** Local chapters of professional organizations that offer educational programs may count if they are on qualifying topics. Regular business meetings, networking events, and sessions on personal development do not count.

Example: **ATD Metro DC Chapter:** Leadership Development and the Brain: Recent Developments in Neuroscience and Cognitive Psychology. Two-hour program preceded by one hour of networking would equal two credit hours.

**5) Webcasts:** Webcasts on qualifying topics do count provided they are given by reputable organizations.

Example: *Training Magazine Network: Is Interactivity Enough? Creating Successful eLearning Designs*

## APPENDIX H: STUDY GROUP FACILITATOR FEEDBACK

To assist us in providing support to study groups, please complete this short survey after you have completed a study group cycle. We have listed the questions below, but you can find the survey on our website:

[https://atdorg.formstack.com/forms/study\\_group\\_feedback](https://atdorg.formstack.com/forms/study_group_feedback)

1) How many candidates participated in your study group?

- Fewer than six
- Six to 11
- 12 to 24
- More than 24

2) Did you hold the study group virtually or face-to-face?

- Virtually
- Face-to-face
- Mix of virtual and face-to-face

3) How often did you meet?

- Twice per week or more
- Once per week
- Twice per month
- Once per month
- Other

4) How long were your study group meetings?

- 30 minutes
- One hour
- 1.5 to two hours
- 2.5 to three hours
- Other

5) What time of day did you meet?

- During regular working hours (Nine to five)
- Lunchtime
- Weekday evenings
- Weekends

6) How many weeks did your study group cohort meet?

- Fewer than six weeks
- Seven to 10 weeks
- Eleven to 14 weeks
- More than 14 weeks

7) What have you learned from supporting this study group that would help other groups?

8) What changes or improvements would you recommend that would make for this study group guide more helpful to other groups?