



CERTIFICATION INSTITUTE
Association for
Talent Development

CERTIFICATION HANDBOOK

Certified Professional in
Talent Development (CPTD)

ATD Certification Institute
1640 King Street
Alexandria, VA 22314, USA
Phone: 703.683.8100 • 800.628.2783
Email: CPTDcertification@td.org
Website: td.org/cptd



**CERTIFIED
PROFESSIONAL
IN TALENT
DEVELOPMENT**

ATD CERTIFICATION
INSTITUTE

PREFACE

The CPTD Certification Handbook is the primary source for the CPTD program and provides individuals with everything they need to know to understand, participate in, and complete the CPTD certification process. It is a must read for CPTD applicants and candidates. Candidates must comply with all policies, procedures, and deadlines in this manual.

The ATD Certification Institute (ATD CI) reserves the right to change the standards, application, and requirements for the CPTD certification and recertification procedures when necessary. It is important that candidates refer to the Certification Handbook often to check for updates to ensure they have the most current information.

The CPTD Certification Handbook is the property of ATD CI. Permission to reproduce its contents must be granted in writing from ATD CI.

Effective July 1, 2020

All policies and procedures in the CPTD Certification Handbook are effective as of the date above and supersede all previous policies and procedures.

This Handbook identifies the application and registration processes, eligibility requirements, fees and detailed information about the two examinations, testing requirements, and scoring methodology.

Each candidate must read the entire Handbook **BEFORE** beginning the application, registration, and payment processes for the CPTD program.

Table of Contents

INTRODUCTION	5
The ATD Certification Institute	5
The Talent Development Capability Model	5
What is CPTD®?	5
Eligibility Requirements	6
2020/2021 CPTD Testing Dates	8
Testing Options	8
2020 Testing Fees	9
CPTD Exam	10
CPTD Exam Format	10
What is on the CPTD Exam	12
Preparing for the CPTD Exam	17
Preparation Resources	17
Reading Reference List	19
Applying for the CPTD Exam	24
Submitting an Application for the CPTD Program	24
Audit of Applications	25
Payment of Fees	25
Scheduling an Exam	26
Testing Centers	26
Remote Proctoring	26
Appointment Scheduling	27
Appointment Confirmation	27
Cancellation, Rescheduling, and Transfer Fees	28
Exam Dates Affected by Severe Weather or Local/National Emergencies	28
Exam Day	28
What to Bring to the Test Center	28
Personal Identification Requirements	28
What to Expect at the Testing Center	29
What to Expect during Remote Proctoring	30

Special Accommodations.....	31
General Exam Policies.....	32
Exam Copyright.....	32
Confidentiality and Conduct	32
Grounds for Dismissal.....	32
Exam Results.....	33
How the Cut Score Is Determined	33
Retest Policy	34
CPTD Achievement	34
Policy on Use of the Certification Mark.....	35
Recertification Guidelines	36
Appendix A: Code of Ethics and Disciplinary Process.....	37
Appendix B: CPTD Program Applicant Declaration & Release	44
CPTD Program Candidate Intent to Participate	45
Appendix C: CPTD Gap Assessment.....	46
Appendix D: Sample Case Management Questions	52
Appendix E: Appeal Process and Form	63
CPTD Program Appeal Form	64

INTRODUCTION

The ATD Certification Institute

The ATD Certification Institute (ATD CI) is an independent not-for-profit organization created by the Association for Talent Development (ATD) 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

The ATD Certification Institute's vision is to provide world-class credentials for the talent development community. ATD CI is responsible for the development, administration, and governance for 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 preparation.

The Talent Development Capability Model™

The Talent Development Capability Model defines the capabilities for the talent development field. It answers the question, "What do talent development professionals need to know and do to be successful?" The model is the foundation for CPTD certification. The exam covers a subset of the knowledge and skills statements deemed appropriate for a talent development professional at the five-year mark in their career.

What is CPTD®?

The Certified Professional in Talent Development (CPTD), formerly the Certified Professional in Learning and Performance (CPLP), is a certification for talent development professionals offered by the ATD Certification Institute (ATD CI). The CPTD covers a subset of knowledge and skills from the [Talent Development Capability Model](#), focusing on skills application and decision making for professionals with at least five (5) years of experience in talent development.

Individuals who wish to pursue the CPTD certification must meet program eligibility requirements and pass a three-hour standardized exam. Those who pass the exam earn the right to display the CPTD designation after their name. As it is a certification, professionals earning the credential need to recertify every three years with proven professional development activities.



Eligibility Requirements

To be eligible for the CPTD program, candidates must meet all criteria for one of the pathways below:

- Standard Pathway – 5 years of experience¹ and 60 hours of qualified professional development²
- APTD Pathway – 4 years of experience¹ and a current APTD credential
- ATD Master Pathway – 5 years of experience¹ and completion of an ATD Masters certificate

Eligibility Requirements			
Category	Standard Pathway	APTD Pathway	ATD Master Series Certificate Pathway
Experience	Five years (60 months) of paid, professional work experience ¹ with adults in the talent development field or related discipline (human resources, higher education or similar)	Four years (48 months) of paid, professional work experience ¹ with adults in the talent development field or related discipline (human resources, higher education or similar).	Five years (60 months) of paid, professional work experience ¹ with adults in the talent development field or related discipline (human resources, higher education or similar)
	PLUS	PLUS	PLUS
Professional Development	Sixty hours (60) of professional development ² over the past 60 months in talent development content.	Holds a current APTD credential. The APTD must be current and in good standing at the time of application.	Successful completion of any ATD Master Series Certificate within the past five years (60 months)

Work Experience and Professional Development Definitions:

¹ Paid, professional **work experience** is defined as on-the-job experience, working with adults, performing talent development activities as described in the [Developing Professional Capability](#) and/or [Impacting Organizational Capability](#) domains of the Talent Development Capability Model (see table below). Candidates must have reached the required months of experience at the time of application.

² The **Professional Development** eligibility requirement helps to ensure that applicants for certification have a solid foundation of talent development knowledge on which they will be assessed. Professional Development for eligibility is defined as activities covering content in the [Building Professional Capability](#) and [Impacting Organizational Capability](#) domains as outlined in the Talent Development Capability Model. See page 7 for further instructions regarding professional development activities. Detailed definitions of the capabilities included in the model can be found [here](#).

Rules Governing the Professional Development Requirement:

- One hour is awarded for each physical hour of a continuing education activity unless otherwise specified. Non-educational time incorporated in educational activities such as meals, breaks, networking, registration, preparation, and assignments should not be included.
- All educational activities must be at least 30 minutes in length to qualify.
- Prorated hours (in 15- minute increments) are permissible after the first 30 minutes.
- On-demand and online learning qualifies if proof of completion can be obtained. For on-demand courses, please use the number of credit hours pre-assigned by the educational provider.
- Applicants should retain proof of completion in the event they are selected for audit.
- Professional Development educational hours must cover content found in the Professional and Organizational Capability domains (see table below) because this content is specifically focused on building the skills required to perform effectively in talent development.

Professional Capabilities	Organizational Capabilities
<ul style="list-style-type: none"> • Learning Sciences • Training Delivery & Facilitation • Instructional Design • Technology Application • Knowledge Management • Career & Leadership Development (<i>developing others, not yourself</i>) • Coaching • Evaluating Impact 	<ul style="list-style-type: none"> • Business Insight • Consulting & Business Partnering • Organization Development & Culture • Talent Strategy & Management • Change Management • Performance Improvement • Data & Analytics • Future Readiness

- Topics covered in the Personal Capability domain, while relevant and important, are universally transferable skills and therefore not eligible for Professional Development hours for initial certification. Courses on topics that do not count towards initial certification include:
 - Communication
 - Emotional Intelligence
 - Collaboration & Leadership (*developing yourself, not others*)
 - Cultural Awareness & Inclusion
 - Project Management
 - Compliance & Ethical Behavior
- Training on proprietary programs or methods or specific software or hardware platforms (such as Myers-Briggs, DiSC, Adobe, or Canvas, etc.) do not qualify for eligibility purposes because they cover proprietary “how to” content and do not cover broader talent development concepts found in the Talent Development Capability Model.
- Courses designed to prepare candidates for the certification exam may be applicable, if preapproved. For example, ATD’s preparation courses for the CPTD can be reported for a total of 20 hours of professional development eligibility.
- All courses, including preparation courses, only qualify towards eligibility after **completion**.

Examples of Eligible Continuing Education Programs or Courses:

- Commercially available talent development educational courses or workshops.
- Educational sessions related to talent development topics at local conferences such as ATD or SHRM chapter sponsored conferences.
- Undergraduate or graduate-level talent development related courses from an accredited institution are eligible for 15 hours per semester credit hour.

2021 CPTD Testing Dates

CPTD Exam Schedule for 2021				
Registration Opens	Registration Deadline	Testing Window	Black Out Period	Score Notification
July 1, 2020	January 2, 2021	February 3– April 28, 2021	February 25 – April 6, 2021	Instant
December 7, 2020	March 6, 2021	April 7, 2021 – June 23, 2021	April 29 – June 1, 2021	Instant
February 2, 2021	May 1, 2021	June 2 - August 25, 2021	June 24 – August 3, 2021	Instant
April 4, 2021	July 2, 2021	August 4 – October 27, 2021	August 26 – October 5, 2021	Instant
June 6, 2021	September 5, 2021	October 6 – December 22, 2021	October 28 – November 30, 2021	Instant

Testing Options

Candidates now have the option of taking the newly revised CPTD at an approved testing center or via remote proctoring.

Testing Centers

ATD CI partners with a PearsonVUE to deliver the exams. The test provider offers authorized testing centers in most major cities in the United States and Canada as well as in many global locations. More information about test centers including a list of locations can be found on page 26 of this handbook.

Remote Proctoring

Candidates may now opt to take the exam via remote proctoring during the same testing windows outlined above. For more information about remote proctoring, see page 26 of this handbook or the page on the ATD website (<https://www.td.org/certification/remoteproctoring>).

2021 Testing Fees

TYPE	AMOUNT	DETAILS
Exam Fee (nontransferable)	\$900.00 USD <i>ATD Member</i> \$1,250.00 USD <i>Nonmember</i>	<p>Fees include: 18 months of eligibility, a testing seat for exam during 2 consecutive administrations (90 day window), exam score report, and CPTD certificate and lapel pin once certification is achieved.</p> <p>Fees do not include: study materials, study group support or preparatory classes, traveling expenses to and from testing centers, or retest, transfer, and test administration fees.</p> <p>NOTE: Candidates must register for a specific window at the time of registration. The eligibility is for a two-administration span of time and If the candidate chooses to transfer to a later testing window set, a transfer fee will apply. If a candidate does not test during the 18-month eligibility period, all fees are forfeited.</p> <p>Candidates who decide to withdraw from the program can receive a refund if the request is made prior to the registration deadline for the window they selected. After that time, no refunds will be issued.</p> <p>Audit Refund: Pending an audit review, a review fee of \$250 will be withheld for anyone deemed ineligible for the program.</p>
Administration Late Rescheduling/Missed Appointment Fee	\$100.00 USD	<p>An administrative fee of \$100 is required and paid directly to ATD CI when a candidate reschedules or cancels an in-person testing center exam appointment with less than 72 hours' notice at a testing center. Candidates who opt for remote proctoring may cancel up to the time of the appointment without penalty. All candidates, including those using remote proctoring, will be assessed a \$100 fee if they do not appear for their scheduled appointment and do not notify PearsonVue. Rescheduled appointments must be within the same testing window or will be considered a transfer and a \$300 transfer fee will apply. Rescheduling requests are subject to eligibility and availability.</p>
Transfer Fee	\$300.00 USD	<p>Fee applies to switch to a different testing window set. This fee is nontransferable and nonrefundable.</p>
Retest Fee	\$300.00 USD	<p>Fee applies to retake either exam after failing that exam. This fee is nontransferable and nonrefundable.</p>

Special Accommodations	No Fee	No fee provided the ADA requirements outlined in the CPTD Certification Handbook are followed. ATD CI makes final decisions regarding accommodations granted.
Recertification Application Fee	\$200.00 USD	Fee applies to participate in the recertification process. A completed recertification application must accompany the payment. Recertification is required every three (3) years.
Recertification Retest Fee	\$350.00 USD	Fee applies to credential holders electing to retest to satisfy the recertification professional development requirement. Note: this fee is in <i>addition</i> to the Recertification Application Fee and covers one testing seat for exam during 2 consecutive windows (90 day window) and exam score report.

As noted above, preparatory resources are not required for program eligibility or testing but are available through ATD for a fee and are not included in the cost of the exam.

CPTD Exam

To achieve the CPTD credential, candidates must meet the eligibility criteria and pass a standardized exam that includes a mix of traditional multiple-choice questions and decision-making and professional judgment questions called case management items. Scores will be given immediately at the end of the exam at the test center. For those taking the exam through remote proctoring, score reports will be available through the certification portal under the Results tab.

CPTD Exam Format

The CPTD Exam is designed to measure a candidate's breadth of knowledge and skill in the talent development profession.

- The full exam contains 150 measurement opportunities that focus on the topics listed in the Detailed Content Outline of the exam found in this Handbook.
- Candidates will have three (3) hours to complete the exam.

During the test, the CPTD Exam will be presented as follows:

Section	Content	Time Allowed
Section 1	90 multiple-choice items	1 hour and 45 minutes (105 minutes)
Break	Optional break	10 minutes
Section 2	10 case management problems, each with 3-4 steps	1 hour and 5 minutes (65 minutes)
Total		3 hours (180 minutes)

Each section is timed separately, and any unused time from one section may NOT be used on another section.

At the end of Section 1, a Review screen will be provided. Candidates may review their answers within Section 1 until they choose to end Section 1 or until time expires (at which point the system will automatically move to the optional break). Candidates will NOT be able to return to Section 1 once they exit.

Between Sections 1 and 2, there is an optional 10-minute break. Any break time exceeding the 10 minutes will be deducted from Section 2 of the exam.

A **Help** button appears in the bottom navigation bar and will be available throughout the exam. This button opens the Help window, which provides information about how to use the testing system, including how to respond to exam questions, how to move within the exam, how to flag questions for later review, and how to use the Navigator window and Review screen.

Section 1: Multiple-Choice Items

This section contains 90 multiple-choice questions. Each multiple-choice question has four response items and only one is correct. Choose the best response and select only one answer. The last selection made is will be the recorded answer. Correct answers are scored as +1. There is no penalty for incorrect answers in the multiple-choice portion of the exam. Unanswered items are scored as incorrect.

Section 2: Case Management Problems

This section contains 10 case management problems, each with 3-4 steps. The total number of steps in Section 2 and the test taker's current location within those steps will be indicated on the right side of the top navigation bar on each step.

The case management format includes groups of multiple-select questions that are related to a short, common scenario designed to replicate decision-making and professional judgement in credible scenarios. Candidates will be given a list of options to choose from at each stage of the scenario. For each step, ***select as many actions as are needed*** to appropriately respond to the situation presented, but only select actions that are necessary; ***do not select actions that are optional***.

Candidates **MUST** select at least one action before being able to move to the next step. Candidates **WILL NOT** be able to return to any prior steps or change any answers once they have moved on to the next step of the case during the case management portion of the exam.

Scoring of Case Management Questions

Correct choices are scored as +1. Incorrect choices are scored as -1. The scenario reveals additional information as the candidate proceeds through the item. As a result, the candidate will not be able to go back and change answers to earlier stages of the item. Examples of the new item type can be found in **Appendix D** of this Candidate Handbook.

What is on the CPTD Exam

The Detailed Content Outline provides the syllabus or blueprint of the content covered on the CPTD exam. While the full exam focuses on the breadth of knowledge and skill, certain content areas are weighted more heavily than others. The table below outlines the content covered and the relative weighting of topics on the exam by domain of practice.

Certified Professional in Talent Development (CPTD) Detailed Content Outline <i>Effective July 1, 2020</i>		
Content Area	Capability Statement	Percentage of Exam
1. Building Personal Capability		20%
1.1 Communication	1.1.A Skill in using communication strategies that inform and influence audiences. 1.1.B Skill in applying verbal, written, and/or non-verbal communication techniques. 1.1.C Skill in conceiving, developing, and delivering information in various formats and media.	
1.2 Emotional Intelligence & Decision-Making	1.2.A Knowledge of theories of emotional intelligence.	
1.3 Collaboration & Leadership	1.3.A Knowledge of theories, methods, and techniques to build and manage professional relationships, for example group dynamics, teamwork, shared experience, and negotiation. 1.3.B Knowledge of conflict management techniques. 1.3.C Knowledge of theories of leadership, for example transformational, inclusive, and situational.	
1.4 Cultural Awareness & Inclusion	1.4.A Skill in integrating diversity and inclusion principles in talent development strategies and initiatives.	
1.5 Project Management	1.5.A Skill in evaluating and prioritizing implications, risks, feasibility, and consequences of potential activities. 1.5.B Skill in establishing, monitoring, and communicating progress toward the achievement of goals, objectives, and milestones.	
1.6 Compliance & Ethical Behavior	1.6.A 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.	

Content Area	Capability Statement	Percentage of Exam
2. Developing Professional Capability		45%
2.1 Learning Sciences	<p>2.1.A 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>2.1.B Knowledge of the foundational learning theories of behaviorism, cognitivism, and constructivism.</p>	
2.2 Instructional Design	<p>2.2.A Skill in selecting and aligning delivery options and media for training and/or learning events to the desired learning or behavioral outcomes.</p> <p>2.2.B Skill in developing learning and behavioral outcome statements.</p> <p>2.2.C Skill in designing blueprints, schematics, and/or other visual representations of learning and development solutions, for example wireframes, storyboards, and mock-ups.</p> <p>2.2.D Skill in designing and/or 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>	
2.3 Training Delivery & Facilitation	2.3.A Knowledge of facilitation methods and techniques.	
2.4 Technology Application	<p>2.4.A Skill in identifying, selecting, and/or implementing learning technologies, for example using evaluative criteria and identifying appropriate applications in an instructional environment.</p> <p>2.4.B Skill in selecting, integrating, managing, and/or maintaining learning platforms, for example learning management systems, knowledge management systems, and performance management systems.</p>	
2.5 Knowledge Management	<p>2.5.A Skill in curating instructional content, tools, and resources, for example researching, evaluating, selecting, and/or assembling publicly available online courseware.</p> <p>2.5.B Skill in designing and implementing knowledge management strategy.</p>	

2. Developing Professional Capability (con't)		
Content Area	Capability Statement	
2.6 Career & Leadership Development	2.6.A Skill in sourcing, designing, building, and evaluating leadership development experiences.	
	2.6.B Knowledge of how to develop and implement qualification programs.	
2.7 Coaching	2.7.A Skill in helping individuals or teams identify goals, develop realistic action plans, seek development opportunities, and monitor progress and accountability. 2.7.B Skill in coaching supervisors and managers on methods and approaches for supporting employee development.	
2.8 Evaluating Impact	2.8.A Knowledge of models and methods to evaluate the impact of learning and talent development solutions. 2.8.B Skill in creating data collection tools, for example questionnaires, surveys, and structured interviews. 2.8.C Skill in identifying and defining individual and/or organizational outcome metrics based on evaluation strategy and/or business objectives of a solution.	

Content Area	Capability Statement	Percentage of Exam
3. Impacting Organizational Capability		35%
3.1 Business Insight	3.1.A Skill in creating business cases for talent development initiatives using economic, financial, and organizational data. 3.1.B Skill in managing budgets and resources.	
3.2 Consulting & Business Partnering	3.2.A Skill in synthesizing information to formulate recommendations or a course of action to gain agreement, support, and/or buy-in from stakeholders. 3.2.B Skill in establishing and managing organizational and/or business partnerships and relationships. 3.2.C Skill in partnering with other organizational units to provide guidance on departmental or organizational talent requirements. 3.2.D Skill in identifying, minimizing, and overcoming organizational barriers to implementing talent development solutions and/or strategies.	

Content Area	Capability Statement	
3.3 Organization Development & Culture	<p>3.3.A Skill in designing and implementing organizational development strategy.</p> <p>3.3.B 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.C Skill in identifying formal and informal relationships, hierarchies, and power dynamics in an organization.</p> <p>3.3.D Skill in creating a culture which encourages and/or creates opportunities for dialogue and feedback between individuals and groups, for example designing collaborative work practices and/or spaces, and role-modeling effective feedback techniques.</p> <p>3.3.E Skill in assessing and evaluating employee engagement.</p> <p>3.3.F Skill in designing and implementing employee engagement strategy.</p>	
3.4 Talent Strategy & Management	<p>3.4.A Skill in designing and implementing performance management strategy.</p> <p>3.4.B Skill in developing a talent strategy that aligns to organizational strategy to influence organizational outcomes in a positive direction.</p> <p>3.4.C Skill in designing and implementing strategic plans for talent development projects, programs, and/or functions.</p> <p>3.4.D Skill in identifying anticipated constraints or problems affecting talent development initiatives, for example resource deficiencies or lack of support.</p> <p>3.4.E Skill in establishing and executing a marketing strategy to promote talent development.</p> <p>3.4.F Skill in designing and implementing communication strategy in order to drive talent management objectives.</p> <p>3.4.G Skill in communicating how talent development strategies and solutions support the achievement of targeted business/organizational results.</p> <p>3.4.H Skill in communicating the value of lifelong learning and professional development.</p>	

Content Area	Capability Statement	
3.5 Performance Improvement	<p>3.5.A 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.B Skill in designing and developing performance improvement solutions to address performance gaps.</p> <p>3.5.C Skill in conducting performance analysis to identify goals, gaps, or opportunities.</p> <p>3.5.D 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.E Knowledge of theories, models, and principles of human performance improvement.</p>	
3.6 Change Management	<p>3.6.A Knowledge of change management theories and models, for example Lewin, Kotter, Bridges' transition model, Kubler-Ross change curve, and appreciative inquiry.</p>	
3.7 Data & Analytics	<p>3.7.A Skill in selecting and/or using data visualization techniques, for example flow charts, graphs, plots, word clouds, and heat maps.</p> <p>3.7.B Skill in identifying stakeholders' needs, goals, requirements, questions, and objectives to develop a framework and/or plan for data analysis.</p> <p>3.7.C Skill in analyzing and interpreting results of data analyses to identify patterns, trends, and relationships among variables.</p> <p>3.7.D Skill in gathering and organizing data from internal and/or external sources in logical and/or practical ways to support retrieval and manipulation.</p>	
3.8 Future Readiness	<p>3.8.A Knowledge of techniques to promote, support, and/or generate innovation and creativity, for example design thinking, brainstorming, and ideation.</p> <p>3.8.B Knowledge of internal and external factors that influence talent development, for example organizational/business strategies, availability of labor, developments in other industries, societal trends, and technological advances.</p>	

Preparing for the CPTD Exam

There is no single, best way to prepare for the CPTD examination. Preparation methods and duration all depend on a candidate's personal experiences and knowledge base. There is not a mandatory test preparation or study requirement for the CPTD program, nor a preferred preparation method. However, there are some basic steps that we recommend to all candidates.

Step 1: ATD CI recommends that each candidate begin with a careful evaluation of the CPTD Detailed Content Outline described beginning on page 12 of this handbook. The outline provides information about the topics that are covered on the CPTD exam and can be used as a general guide for the study process. Pay attention to the specific subset of content found on the CPTD exam and how each section is weighted.

Step 2: Candidates should begin with an honest gap-assessment to determine areas of strength and weakness. This can help candidates focus their study plan. A Gap Assessment tool can be found in **Appendix C** of this handbook.

Step 3: Once areas for focus have been identified, candidates should develop a study plan, set a personal study schedule, and hold themselves accountable to that schedule. Candidates find it helps to share their study plan with colleagues, friends or family members to help keep them on track with their study plan. A study planning guide can be downloaded from the ATD website [here](#).

Step 4: Our candidates report that they have spent 80 to 100+ hours preparing for the CPTD Exam, depending on their background and experience. Keep in mind, each candidate will have a different set of study needs and preferred methods resulting in differing amounts of study time required. When preparing keep the following suggestions in mind:

- Create a realistic study schedule.
- Focus on the *application* of accepted principles and theories, not on memorizing names and dates.
- Take notes to help reinforce key concepts.

Preparation Resources

- **CPTD Candidate Preparation Linked in Group:** ATD facilitates a LinkedIn group for CPTD candidates. Useful information is posted in the group and it allows candidates to network or share information with one another. The group can be found here: <https://www.linkedin.com/groups/8896013/>
- **Active Candidates page:** ATD CI uses this page to store files and resources that may be useful to active candidates, including the most recent handbooks: www.td.org/certification/active-candidates
- **Study Planning Guide:** A CPTD study planning guide can be downloaded from the ATD website here: www.td.org/certification/cptd/prepare or from the active candidates page mentioned above.
- **Reference Resource List:** ATD CI has compiled a reference list of books with trusted content on the capabilities covered on the exam. The reference resource list can be found starting on page 19 of this handbook.

- **Capability Model and Self-Assessment Tool:** The capability model is described in detail on the ATD website at td.org/capability-model. This [online tool](#) is available for candidates to compare their skills against the new model.
- **Talent Development Body of Knowledge:** The [TD Body of Knowledge](#) (TDBoK) does provide additional detail on each of the capabilities. Keep in mind that not all capability statements included in the TDBoK are tested on the CPTD exam and the TDBoK alone is not enough to prepare for exam.
- **Preparation Course:** The ATD Education department has developed a new preparation course to help candidates pursuing the CPTD credential that is grounded in the new Capability Model. The information for that course can be found [here](#).
- **Sample Questions:** Sample questions can be found in **Appendix D** of this handbook. Additional sample questions may also be found on the ATD website [here](#).
- **Flashcards:** The TDBoK has a flashcard creation feature that allows candidates to create tailored flashcards. Online flashcard systems such as Quizlet and Brainscape have been helpful to candidates in the past. Please be aware that these flashcards are not prepared by ATD and may not reflect the newer Talent Development Capability Model.
- **Chapter Study Groups:** Local ATD Chapters often support certification study groups. A list of current study groups can be found [here](#). For more information on chapter locations can be found here: www.td.org/chapter-locator.
- **Create Your Own Study Group:** For those who are interested in forming their own study group, we have a [study group guide](#) that can help you to get started.
- **Find resources on the Internet** (study materials, workshops, study groups, and so on) or use third-party materials.

Reading Reference List

Review the ATD CI list of books on its Resource Reference List. This list designed to assist candidates in finding publications to aid in filling knowledge gap areas. It is not designed to be exhaustive or intended to be a must-read list. Each candidate will have their own gaps and their own personal libraries from which to prepare.

These resources are more comprehensive in nature, covering multiple topics across several capabilities:

- [*Talent Development Body of Knowledge*](#) (2020), ATD Press
- [*The Fifth Discipline: The Art & Practice of the Learning Organization*](#) (2006) Senge, Peter. Doubleday
- [*ATD Foundations of Talent Development*](#) (2018) Biech, E. ATD Press
- [*ASTD Handbook, 2nd Edition*](#) (2014) Biech, E., ed. ASTD Press
- [*Talent Management Handbook*](#) (2015) Bickham, T. ATD Press

1. Building Personal Capability	
1.1 Communication	<ul style="list-style-type: none"> • Palmer, Erik. <i>Own Any Occasion: Mastering the Art of Speaking and Presenting</i>. 2017, Alexandria, VA: ATD Press. • Appleman, Jack. <i>10 Steps to Successful Business Writing, 2nd Edition</i>. 2017, Alexandria, VA: ATD Press. • Association for Talent Development, <i>10 Steps to Successful Presentations, 2nd Edition</i>. 2019, Alexandria, VA: ATD Press. • Ito, Tim. K. O'Quinn. <i>Focus on Them: Become the Manager Your People Need You to Be</i>. 2018, Alexandria, VA: ATD Press. • Evergreen, S. <i>Effective Data Visualization: The Right Chart for the Right Data</i>, 2nd Edition. 2019, Thousand Oaks, CA: SAGE Publications.
1.2 Emotional Intelligence and Decision-Making	<ul style="list-style-type: none"> • Goleman, D. <i>Emotional Intelligence</i>. 2005, New York: Bantam Press.
1.3 Collaboration and Leadership	<ul style="list-style-type: none"> • Biech, E., ed. <i>ASTD Leadership Handbook</i>. 2010, Alexandria, VA: ASTD Press. • Senge, P. <i>The Fifth Discipline: The Art & Practice of the Learning Organization</i>. 2006, New York: Doubleday. • Haneberg, L. <i>10 Steps to Be a Successful Manager</i>. 2019, Alexandria, VA: ATD Press. • Ito, T., W. Jenkins, K. O'Quinn. <i>Focus on Them: Become the Manager Your People Need You to Be</i>. 2018, Alexandria, VA: ATD Press. • Johansen, B. <i>The New Leadership Literacies: Thriving in a Future of Extreme Disruption and Distributed Everything</i>. 2017, Oakland, CA: Berrett-Koehler Publishers. • Zenger, J. and J. Folkman. <i>The New Extraordinary Leader: Turning Good Managers into Great Leaders</i>. 2019, New York: McGraw-Hill Publishers.
1.4 Cultural Awareness and Inclusion	<ul style="list-style-type: none"> • Silveira, E and Walters, J. <i>TD at Work</i>, "<i>Building Blocks of Workplace Inclusion</i>". 2017, Alexandria, VA: ATD Press. • Rabotin, M. <i>Culture Savvy: Working and Collaborating Across the Globe</i>. 2011, Alexandria, VA: ATD Press.

	<ul style="list-style-type: none"> Livermore, D. <i>Leading with Cultural Intelligence: The Real Secret to Success</i>, 2nd Edition. 2015, New York: AMACOM. Steffey, D. <i>Destination Facilitation: A Travel Guide to Training Around the World</i>. Alexandria, VA: ATD Press.
1.5 Project Management	<ul style="list-style-type: none"> Horine, G. <i>Project Management: Absolute Beginner's Guide, 4th Edition</i>. 2017, Indianapolis, IN: Que Publishing.
1.6 Compliance and Ethical Behavior	<ul style="list-style-type: none"> Biech, E., editor. <i>ASTD Handbook, 2nd edition</i> (Chapter 18). 2014, Alexandria, VA: ASTD Press. Collins, D. <i>Business Ethics: How to Design and Manage Ethical Organizations, 2nd Edition</i>. 2019, Thousand Oaks, CA: SAGE Publications.

2. Developing Professional Capability

2.1 Learning Sciences	<ul style="list-style-type: none"> Biech, E., editor. <i>ASTD Handbook, 2nd Edition</i> (Chapters 11, 13, 21 & 28). 2014, Alexandria, VA: ASTD Press. Knowles, M. <i>The Adult Learner</i>, 8th Edition. 2015, New York: Routledge. Brown, P., H. Roediger, and M. McDaniel. <i>Make It Stick: The Science of Successful Learning</i>. 2014, Boston: Belknap Harvard. Biech, E. <i>The Art and Science of Training</i>. 2017, Alexandria, VA: ATD Press.
2.2 Instructional Design	<ul style="list-style-type: none"> Hodell, C. <i>ISD From the Ground Up</i>, 4th Ed. 2015, Alexandria, VA: ATD Press. Dirksen, J. <i>Design for How People Learn</i>, 2nd Edition. 2015, San Francisco: New Riders Press. Biech, E., editor. <i>ASTD Handbook, 2nd Edition</i> (Chapter 9). 2014, Alexandria, VA: ASTD Press. Toth, T. <i>Technology for Trainers</i>, 2nd Ed. 2015, Alexandria, VA: ATD Press.
2.3 Training Delivery and Facilitation	<ul style="list-style-type: none"> Dirksen, J. <i>Design for How People Learn</i>, 2nd Ed. 2015, San Francisco: New Riders Press. Skolovitch, H. D., and E. J. Keeps. <i>Telling Ain't Training</i>, 2nd Edition. 2011, Alexandria, VA: ATD Press. Biech, E. <i>The Art and Science of Training</i>. 2017, Alexandria, VA: ATD Press. Biech, E., ed. <i>ASTD Handbook, 2nd Edition</i> (Chapter 20). 2014, Alexandria, VA: ASTD Press. Association for Talent Development. <i>10 Steps to Successful Facilitation</i>. 2018, Alexandria, VA: ATD Press.
2.4 Technology Application	<ul style="list-style-type: none"> Udall, C. and G. Woodill. <i>Shock of the New</i>. 2019, Alexandria, VA: ATD Press. Biech, E. <i>ATD Foundations of Talent Development</i> (Chapter 13). 2018, Alexandria, VA: ATD Press. Foreman, S. <i>The LMS Guidebook</i>. 2017, Alexandria, VA: ATD Press.
2.5 Knowledge Management	<ul style="list-style-type: none"> Biech, E., ed. <i>ASTD Handbook, 2nd Edition</i> (Chapter 17 & 41). 2014, Alexandria, VA: ASTD Press. Betts, B. and A. Anderson. <i>Ready Set Curate</i>. 2015, Alexandria, VA: ATD Press. Atwood, C. <i>Knowledge Management Basics</i>. 2009, Alexandria, VA: ATD Press. O'Dell, C & Grayson, C.J. <i>If We Only Knew What We Know: The Transfer of Internal Knowledge</i>. 2012, New York: Free Press.
2.6 Career and Leadership	<ul style="list-style-type: none"> Biech, E, ed. <i>ASTD Leadership Handbook</i>. 2010, Alexandria, VA: ASTD Press. Biech, E., ed. <i>ASTD Handbook, 2nd Edition</i> (Chapter 49). 2014, Alexandria, VA: ASTD

Development	<p>Press.</p> <ul style="list-style-type: none"> Bickham, T. Talent Management Handbook (Chapter 19). 2015, Alexandria, VA: ATD Press. Zenger, J. and J. Folkman. The New Extraordinary Leader: Turning Good Managers into Great Leaders. 2019, New York: McGraw-Hill Publishers. Bruce, A. and S. Montanez. Leaders Start to Finish: A Road Map for Developing Top Performers. 2012, Alexandria, VA: ATD Press.
2.7 Coaching	<ul style="list-style-type: none"> Haneberg, L. Coaching Basics, 2nd Edition. 2016, Alexandria, VA: ATD Press. Bianco-Mathis, V. & Nabors, L. EveryDay Coaching. 2017, Alexandria, VA: ATD Press. Biech, E. ATD Foundations of Talent Development (Chapter 16 & 26). 2018, Alexandria, VA: ATD Press. Biech, E., editor. ASTD Handbook, 2nd Edition (Chapter 40). 2014, Alexandria, VA: ASTD Press.
2.8 Evaluating Impact	<ul style="list-style-type: none"> Kirkpatrick, J. and W. Kirkpatrick. Four Levels of Training Evaluation. 2016, Alexandria, VA: ATD Press. McCain, D. Evaluation Basics. 2016, Alexandria, VA: ATD Press. Biech, E., editor. ASTD Handbook, 2nd Edition (Chapter 29 - 33). 2014, Alexandria, VA: ASTD Press. Association for Talent Development. <i>TD at Work</i>, "A Strategic Approach to Talent Development." 2019, Alexandria, VA: ATD Press.

3. Impacting Organizational Capability

3.1 Business Insight	<ul style="list-style-type: none"> Biech, E., editor. ASTD Handbook, 2nd edition (Chapter 43). 2014, Alexandria, VA: ASTD Press. Biech, E. ATD Foundations of Talent Development (Chapter 6 & 12). 2018, Alexandria, VA: ATD Press. Oliver, L. <i>TD at Work</i>, "Preparing & Defending Your Training Budget." 2017, Alexandria, VA: ATD Press. Cope, K. Seeing the Big Picture: Business Acumen to Build Your Credibility, Career, and Company. 2012, Austin, TX: Greenleaf Book Group Press. Oliver, L and Nin, E. 10 Steps to Successful Budgeting. 2019, Alexandria, VA: ATD Press.
3.2 Consulting and Business Partnering	<ul style="list-style-type: none"> Biech, E., editor. ASTD Handbook, 2nd Edition (Chapters 7, 36, 38, and 47). 2014, Alexandria, VA: ASTD Press. Association for Talent Development, <i>TD at Work Collection</i>, "A Strategic Approach to Talent Development." 2019, Alexandria, VA: ATD Press. Needs Assessment Basics, 2nd Edition. 2016, Alexandria, VA: ATD Press. Biech, E. ATD Foundations of Talent Development (Section I & II & Chapter 9). 2018, Alexandria, VA: ATD Press. Scott, B. and Barnes, B.K. Consulting on the Inside, 2nd Edition. 2011, Alexandria, VA: ATD Press.
3.3 Organization Development and Culture	<ul style="list-style-type: none"> Burkett, H. Learning for the Long Run: 7 Practices for Sustaining a Resilient Learning Organization. 2017, Alexandria, VA: ATD Press. Stallard, M. Connection Culture: The Competitive Advantage of Shared Identity, Empathy, and Understanding at Work. 2015, Alexandria, VA: ATD Press. Senge, P. The Fifth Discipline: The Art & Practice of the Learning Organization. 2006, New York: Doubleday.

	<ul style="list-style-type: none"> Rothwell, W. Organization Development Fundamentals. 2015, Alexandria, VA: ATD Press. Johnson, S. Engaging the Workplace: Using Surveys to Spark Change. 2018, Alexandria, VA: ATD Press. Bickham, T. Talent Management Handbook (Chapter 7). 2015, Alexandria, VA: ATD Press.
3.4 Talent Strategy and Management	<ul style="list-style-type: none"> Bickham, T. Talent Management Handbook (Chapter 10-12). 2015, Alexandria, VA: ATD Press. Locwin, B. <i>TD at Work</i>, "A Modern Approach to Performance Feedback." 2019, Alexandria, VA: ATD Press. Biech, E. ATD Foundations of Talent Development (Sections I, II, III, Chapters 10 -11, 29). 2018, Alexandria, VA: ATD Press. Association for Talent Development. <i>TD at Work Collection</i>, "A Strategic Approach to Talent Development." 2019, Alexandria, VA: ATD Press. Oakes, K. and P. Galagan. The Executive's Guide to Integrated Talent Management. 2011, Alexandria, VA: ATD Press.
3.5 Performance Improvement	<ul style="list-style-type: none"> Biech, E., editor. ASTD Handbook, 2nd Edition (Chapter 28). 2014, Alexandria, VA: ASTD Press. Biech, E. ATD Foundations of Talent Development (Chapter 13). 2018, Alexandria, VA: ATD Press. Robinson, D. and P. Phillips. Performance Consulting: A Strategic Process to Improve, Measure, and Sustain Organizational Results, 3rd Edition. 2015, Oakland, CA: Berrett-Koehler Publishers. Willmore, J. Performance Basics, 2nd Edition. 2016, Alexandria, VA: ATD Press. Senge, P. The Fifth Discipline: The Art & Practice of the Learning Organization. 2006, New York: Doubleday.

3. Impacting Organizational Capability	
3.6 Change Management	<ul style="list-style-type: none"> Biech, E., editor. ASTD Handbook, 2nd Edition (Chapter 47). 2014, Alexandria, VA: ASTD Press. Rothwell, W. Organization Development Fundamentals. 2015, Alexandria, VA: ATD Press. Gerschel, A. and L. Polsky. Rapid Retooling. 2013, Alexandria, VA: ATD Press. Kotter, J. Leading Change. 2012, Cambridge, MA: Harvard Business Review.
3.7 Data and Analytics	<ul style="list-style-type: none"> Association for Talent Development. <i>TD at Work</i>, "A Strategic Approach to Talent Development." 2019, Alexandria, VA: ATD Press. Reynolds, V. Big Data for Beginners: Understanding SMART Big Data, Data Mining & Data Analytics For improved Business Performance, Life Decisions & More! 2016, CreateSpace. Evergreen, S. Effective Data Visualization: The Right Chart for the Right Data, 2nd Edition. 2019, Thousand Oaks, CA: SAGE Publications. Biech, E., editor. ASTD Handbook, 2nd Edition (Chapter 33 & 34). 2014, Alexandria, VA: ASTD Press. Nussbaumer Knaflic, C. Storytelling: Data Visualization for Business Professionals. 2015, Hoboken, NJ: John Wiley and Sons.
3.8 Future Readiness	<ul style="list-style-type: none"> Udall, C., and G. Woodill. Shock of the New. 2019, Alexandria, VA: ATD Press.

	<ul style="list-style-type: none"> • Lewrick, M., P. Link, and L. Leifer. <i>The Design Thinking Playbook: Mindful Digital Transformation of Teams, Products, Services, Businesses and Ecosystems</i>. 2018, Hoboken, NJ: John Wiley and Sons. • Senge, P. <i>The Fifth Discipline: The Art & Practice of the Learning Organization</i>. 2006, New York: Doubleday. • Glynn, K and Tolsma, D. <i>TD at Work</i>, "Design Thinking Meets ADDIE." 2017: Alexandria, VA: ATD Press. • Biech, E. <i>ATD Foundations of Talent Development</i> (Chapter 33 - 36). 2018, Alexandria, VA: ATD Press.
--	---

Applying for the CPTD Exam

Before beginning an application, candidates must:

- **Read this entire CPTD Certification Handbook.** Candidates will be required to sign a statement verifying that they have read the Handbook.
- **Review instructions for completing an application.** A link to the ATD Certification Portal and step by step instructions for applying can be found [here](#). During the online application process, candidates are required to sign important releases and agreements, including an applicant declaration and release, intent to participate and the ATD CI Code of Ethics. Please review the candidate releases included in **Appendix B** of this Handbook before applying.
- **Prepare a current resume.** During the application process, candidates will be asked to upload a current resume.
- **Add Certification@td.org to their email “safe list”** to ensure that they receive communication about their CPTD applications.

Please note that no eligibility decisions will be made outside the application in the ATD Certification Portal. If you are unsure your experiences and professional development are aligned with the requirements, please refer to the certification eligibility requirements and carefully review your qualifications.

Candidates who will require special accommodations during the testing process, should review the special accommodations policy section on page 31 before applying.

Submitting an Application for the CPTD Program

To apply for the CPTD certification program, go to the [ATD Certification Portal](#). An ATD login and password will be required to login to the portal. Please call ATD customer Care at 800.628.2783 with questions.

Candidates who already have a login on the ATD site, should use that login name and password when signing in, as it will link their certification information from their td.org account.

To begin the process, applicants will need to consider the following:

- **Legal Name:** Candidates must supply their full legal name as it appears on their official, government-issued identification. In order to be admitted to the testing center, the name on all official identification **MUST** match the name on the exam registration. If they do not match, candidates will be denied entry to the testing center and will have to pay a Transfer Fee.
- **Certificate Name:** This is name that will be used in all correspondence with ATD CI and the name that will be printed on the CPTD Certificate.
- **Testing Windows:** Candidates will be asked to select a specific testing window. and should consider their schedules carefully when choosing a test window for the exam. Eligibility will be granted for a two-consecutive window timeframe (approximately 90 days, of which approximately 60 days are active testing days). Appointments may be scheduled during any part of this two-window set. Once the exam registration fee has been paid, candidates will be charged

a transfer fee if they wish to change their test window. Please refer to page 9 for program fee information.

- **Employment Details and Resume:** Applicants will be asked to provide specifics about their employment in the talent development field, including position title, starting and ending dates, employer names, and employer addresses. A current resume will be required.
- **Professional Development Details:** Details about professional development activities that have been completed within the last five years, including dates and hours of participation.
- Applicants should include adequate employment and professional development information to meet the minimum eligibility requirements. **If more than one talent development position will be reported, additional employers can be added by clicking the ADD NEW button., in the application. Applicants will not be permitted to submit the application until all eligibility criteria are met.**
- Names and contact information of references **from each listed employer** who can validate the applicants' talent development experience must be included. If recent contact information is not available, please include a contact in the HR department.

Audit of Applications

Roughly 10% of CPTD applications are selected for audit. During the audit process, if there are questions about eligibility, candidates will be contacted to provide more specific documentation. If deemed ineligible, candidates will be invited to reapply once the minimum eligibility requirement is met. To appeal an eligibility decision, refer to **Appendix E** for information about the appeals process.

An applicant does not become an official candidate until the CPTD application is complete, the registration fee is paid, and the application has been approved. Once paid, the applicant's official CPTD candidacy begins. Candidates need to pass the CPTD exam within 18 months from the date of registration to achieve the CPTD credential. Candidates who are not successful within the 18-month period, will need to reapply as a new candidate, meet all eligibility requirements in force at the time, and pay all fees in full.

Payment of Fees

Exam fees may be paid in the following ways:

- **Credit Card payment:** Follow the process to make a credit card payment. A receipt will be created that can be printed or saved.
- **Check or wire payment:** Please contact ATD Customer Care at 1-800-628-2783 to be sent an invoice with payment instructions.

Once their application has been approved and payment has been processed, candidates will receive an email from ATD Certification Institute with instructions on how to schedule an exam appointment. A "Schedule Exam" message will also appear on the candidate's home page in the Certification Portal. The certification@td.org email address should be white-listed to be sure that all appropriate notifications are received.

Scheduling an Exam

The CPTD certification process involves candidates taking and passing a standardized exam that focuses on skills application through professional judgement and decision-making. The exam is a computer-based test administered at an ATD CI-authorized testing center or through ATD's official remote proctoring platform during scheduled exam windows. Candidates who have scheduled an exam appointment at a testing center may switch to the remote proctoring option or vice versa assuming all cancellation policies are met.

Testing Centers

ATD CI partners with PearsonVUE to deliver the exams through authorized testing centers in most major cities in the United States and Canada as well as in many global locations. The testing vendor cannot guarantee the availability of testing sessions at all locations during all testing windows, and all testing center locations are subject to change. For the list of the testing centers, go [here](#).

ATD CI recommends that candidates schedule appointments at a Pearson Professional Center (PPC). PPCs are owned and managed entirely by Pearson VUE. All PPCs have the same layouts, policies, and computer stations so consistency is guaranteed from one center to another. PearsonVUE is also committed to maintaining health precautions at its owned centers. Please review PearsonVUE's [COVID-19 Update Page](#) for more information about the health and safety measures in place for testing and to find out about any country-specific testing policies. Appointment availability may be limited due to social distancing precautions and varies by location.

Although Pearson VUE Authorized Testing Centers (PVTC) may have available appointments, all PVTCs are owned and independently operated by third-party providers. Center policies and hours will vary from location to location and could involve *schedule changes that may affect appointment times and require last-minute rescheduling*.

Remote Proctoring

ATD CI has partnered with PearsonVUE to offer a [remote proctored](#) option called OnVUE for the new APTD and CPTD exams. The OnVUE system is a testing platform that works outside of a traditional testing center so candidates can test if they have access to a private room with a computer that has fast, secure, and reliable internet. **Note:** Pearson Vue's OnVUE Remote Proctoring is not available in China or Japan.

Technical Requirements for Remote Proctoring

- **System Check Link:** Pearson Vue's website has a [technical system check](#) that should be performed before scheduling to ensure system compatibility.
- **Online Proctored Policies:** All remote proctored candidates must agree to OnVUE policies before beginning the exam. The policies may be reviewed [here](#).
- **Tutorial Video:** For additional information about what to expect during remote proctoring, review the tutorial video on the PearsonVue site [here](#).

Appointment Scheduling

After their application approval and payment is completed, candidates will receive an email from ATD CI informing them that an exam appointment can now be scheduled. Appointments can be made by clicking on the “Schedule Exam” button in the certification portal. At that time, candidates will be asked to choose the remote proctored or test center option.

Important points to consider when scheduling a testing appointment:

- Each candidate’s authorization to test (ATT) spans one 90-day period with a defined blackout period. Appointments must be scheduled within the specified testing window and no tests can be taken outside the authorized period without incurring a transfer fee. The expanded window covers two months of testing and candidates should schedule as early in the window as possible to accommodate last-minute emergencies that would require rescheduling. Rescheduling within the window does not incur a fee; however, transferring to a future window will incur the transfer fee.
- Where possible, candidates are encouraged to select Pearson Professional Centers as they are owned and operated by Pearson VUE. Third party test sites are more plentiful, but we cannot guarantee the experience at third-party centers.
- Testing center appointments are arranged on a first come, first served basis. Select a testing date early in the process to have access to the largest number of dates, times, and locations.
- The testing center vendor cannot guarantee availability of appointments at all testing center locations. Failure to find a suitable test time slot will not result in a waiver of a transfer fee. If candidates are having problems finding a test time, they should contact ATD CI by emailing certification@td.org as soon as possible.
- Candidates should carefully consider the timing of their exam appointment. Appointments made late in the testing window allow more time for study. However, if unforeseen circumstances interfere with a candidate’s ability to test within the selected window, a transfer fee will be charged.
- The remote proctoring option typically has the largest number of slots available throughout the day and night, providing more flexibility for candidates.
- Candidates who have scheduled an exam appointment at a testing center may switch to the remote proctoring option or vice versa assuming all cancellation policies are met.
- All requests for Special Accommodations under the Americans With Disabilities Act must be submitted to ATD CI directly **as part of the application and registration**. Please see page 31 for more details about requesting accommodations and contact certification@td.org with questions.

Appointment Confirmation

- Once a testing appointment has been scheduled, candidates will receive a confirmation email.
- The confirmation email will include the candidate’s name and authorization number; the test center name and address; and the date, time, and location of the testing appointment.

Cancellation, Rescheduling, and Transfer Fees

All testing appointments must be canceled or rescheduled **directly** with PearsonVue through the online appointment scheduling system that is accessed through the certification portal.

Remote Proctored Exams:

- Remote proctored exams may be scheduled up until 30 minutes before exam time and canceled up the time of the exam.
- Candidates must check-in 30 minutes before the exam appointment. If the system check fails or other technical difficulties are encountered the appointment may be canceled and rescheduled within the same testing window without penalty.
- Any missed appointment without notice is considered a no-show subject to a \$100 fee

Testing Center Appointments:

- All cancellations and reschedules must be made at least 72 hours before the scheduled test day.
- If the cancellation or rescheduling request is made less than 72 hours before the scheduled test day, candidates are subject to a Missed Appointment Fee of \$100.
- In specific situations, and with appropriate documentation, candidates may cancel test appointments with less than 72-hours' notice. Please contact Certification@td.org to cancel. Proper documentation includes a hospital intake or discharge paper, obituary, jury duty notice and so forth. The following situations are acceptable reasons for late cancellation with documentation:
 - Sudden or serious illness (either candidate or an immediate family member)
 - Death in the immediate family
 - Disabling accident
 - Court appearance
 - Jury Duty
 - Unexpected military call-up

Exam Dates Affected by Severe Weather or Local/National Emergencies

If a test date is cancelled due to adverse weather conditions or other types of local or national emergencies, PearsonVue will contact candidates to reschedule the appointment at no charge.

Exam Day

What to Bring to the Test Center

The CPTD exam is administered in secure testing centers. Only approved candidates are admitted to the test center to take the exam. Upon arrival, the test administrator will request two forms of personal identification (see below for specifics). **If the candidate's ID does not match the name on their registration, they will not be permitted to test and will owe fees for a missed appointment.**

Personal Identification Requirements

- Candidates must present two forms of original (no photo copies), valid ID; one form as a primary ID (government issued with name, photo and signature) and one form as a secondary ID (with name and signature or name and recent recognizable photo).

- The first and last name used to register for the exam must exactly match the first and last name on the ID that is presented on test day. All IDs required must be issued by the country in which the test is being taken.
- If candidates do not have qualifying ID issued from the country in which they are testing, an International Travel Passport from their country of citizenship is required, along with a secondary ID. For any questions or concerns about ID requirements, please [contact Pearson VUE](#) or review the full ID policy here: <http://www.pearsonvue.com/policies/1S.pdf>.

Examples of Primary forms of ID	Examples of Secondary Forms of ID
International Travel Passport · Driver's license · Military ID (including spouse & dependents) · Identification card (national/state/province identity card) · Alien registration card (green card, permanent resident, visa) · Local language ID (not in Roman characters) – accepted only if issued from the Country the Candidate is testing in	Any ID containing at least name and signature, or name and recent recognizable photo with exact-matching first and last name, original (no photocopies), unexpired

It is each individual's responsibility to ensure that the CPTD database record shows the full, legal name including middle name and that the required identification contains the full, legal name.

What to Expect at the Testing Center

Testing Centers host a variety of certification programs with varying stakes. As a result, there is usually a high degree of security protocols surrounding operations at a test center to protect the individual as well as the intellectual property of the certifying bodies. Certain protocols may seem stringent but are in place for the protection of all parties involved.

- Candidates must provide the required ID to be admitted to the testing center. Individuals without the required identification will NOT be allowed to test.
- Once admitted to the testing center, candidates should keep their ID with them at all times.
- Candidates must leave personal property, including phones, purses and other personal items in a locked location outside the testing room. Glasses will be inspected to ensure that they do not include smart technology. Candidates may be asked to empty their pockets or show that no materials are hidden in boots or pockets. These policies are enforced to ensure that all candidates are following the same testing and security policies.
- Trained test proctors administer CPTD exams at all testing center sites.
- Candidates are given three pieces of blank paper and two pencils OR white board by the proctor and these items will be collected at the end of the test.
- The examinations are timed, with a timer displayed on the computer screen. Candidates are permitted a total timed testing period of 180 minutes (3 hours) to complete the exam.
- A ten-minute optional break is provided between the multiple choice and case management portions of the exam.
- After completion of the CPTD Exam, candidates will be provided with a score report by the testing center staff at the front desk.
- To ensure that all candidates earn their results under comparable conditions, a standardized testing environment is maintained. Except where permitted by special accommodation

under the Americans with Disabilities Act, none of the following are permitted in the testing room:

- papers
- books
- food and drink
- calculators, cell phones, pagers
- smoking materials
- watches
- purses, wallets, briefcases, backpacks, bags

What to Expect during Remote Proctoring

Remote proctoring has proven to be a convenient choice for many candidates. Before choosing this option, candidates should make sure that their workspace and internet connection meets the [technical requirements](#) for remote proctoring.

Check In

- Just prior to their testing appointment, candidates should test their internet speed, clear the room of any preparation materials and any other notes or handwritten materials, notify others in their location to not disturb them during their appointment.
- Thirty minutes before the exam appointment, candidates must log into the system and complete the check-in procedures which include verification of their identity and to ensure that their workspace and walls are clear of any preparation materials.
- Religious head or face coverings can be worn during the exam but may need to be removed for the live check-in photo.
- Being late is not an option. Candidates must be ready when the check-in window opens 30 minutes before the exam start time to allow for mandatory system checks, download of the testing software and identity verification.

Workspace Requirements

- The testing workspace must be a walled room with a closed door and no distractions. No one else is permitted in the room during testing.
- Trained proctors continuously monitor candidates by video and audio while they are taking the exam.
- Candidates must acknowledge and consent to audio and video recording of their face, voice, and the physical room where testing is taking place as well as the location for exam delivery.
- During check-in, candidates will be asked to take real-time photos of their work area, which will be checked by a proctor prior to the exam. Desktops must be clean and all books, notepads, sticky notes, papers, pens, pencils, and other writing instruments must be out of reach.
- Additional monitors and computers must be unplugged and turned off. Items on the wall with writing on them, such as whiteboards, will be inspected.
- If their workspace does not pass a room scan, candidates will not be permitted to proceed with the exam and will be marked as a no-show for their appointment.

Breaks and Personal Belongings

- **No breaks** are allowed during the 3-hour CPTD exam except for the ten-minute optional break between the two portions of the exam.

- Candidates may have a clear glass of water on the desk, but are not allowed to eat, smoke, or chew gum during the exam.
- During the exam, candidates are **not** allowed to access the following types of personal items: mobile phones, headphones or headsets (wired or Bluetooth), handheld computers or other electronic devices, pagers, watches, wallets, purses, hats (or other head coverings), bags, coats, books, notes, or any other materials not specifically approved.
- Religious head or face coverings can be worn during the exam but may need to be removed for the live check-in photo.
- Watches must be removed.

Termination of Exam

- If candidates are found to be exhibiting inappropriate or wrongful conduct such as accessing study materials during the exam, their exam will be terminated and their exam fee will be forfeited.
- If candidates are interrupted by noises in another part of the building or if others enter the room while they are testing, the exam will be terminated.

For candidates choosing remote proctoring, additional information may be found on the ATD website [here](#) or the PearsonVue page describing the process [here](#).

Special Accommodations

ATD CI and its testing vendor comply with the provisions of the Americans With Disabilities Act (ADA) and Title VII of the Civil Rights Act in accommodating candidates with disabilities who need special accommodations to take the exam. If candidates require special accommodations, they must notify ATD CI of their request **as part of their application**. Only ATD CI has the authority to approve these requests. If the request is not made at the time of application, the accommodations may not be granted.

- The Request for Special Accommodations should be completed as part of the CPTD online application. The required form should be downloaded from the certification portal and completed prior to submitting the application. The form must be signed by a licensed or certified professional qualified to diagnose or treat the condition specified in the request. In addition, this professional must provide a Statement of Explanation describing the conditions and the special accommodation(s) needed.
- Both the completed Request for Special Accommodations Form and the Statement of Explanation must be uploaded to the certification portal **at least 10 weeks before the selected testing window opens**. Once received, the request will be reviewed to determine if reasonable accommodations can be made.
- Please note that there are no extra fees charged by ATD CI for this accommodation if the procedures outlined in this section are followed. For additional information, please contact ATD CI at Certification@td.org.

General Exam Policies

Exam Copyright

ATD CI holds all proprietary rights for the examination, including copyright and trade secret. To protect the integrity of the examination and to ensure the validity of the scores that are reported, candidates must adhere to strict guidelines regarding proper conduct in handling the copyrighted, proprietary information.

Any attempt to reproduce all or part of an examination is strictly prohibited by law. Such attempts include, but are not limited to, removing materials from the examination room, aiding others in reconstructing any portion of an examination by any means, or selling, distributing, receiving, or having unauthorized possession of any portion of an exam. Alleged copyright violations will be investigated and, if warranted, prosecuted to the fullest extent of the law. It should also be noted that examination scores might be invalidated in the event of this type of suspected breach.

Confidentiality and Conduct

Candidates must abide by the following confidentiality and conduct agreement. Failure to abide to the rules of conduct may result in dismissal from the program without refund. The agreement is as follows:

"I understand that the contents of this test are copyrighted, proprietary, and confidential and that disclosure or reproduction of any portion of it to any individual or entity for any purpose whatsoever is prohibited. Such activity will result in the invalidation of test scores and may result in civil and/or criminal prosecution. I can be disqualified from taking or continuing to sit for an examination, or from receiving examination results, or my scores might be canceled if there is substantial reason to believe through proctor observation statistical analysis, and/or other evidence that my score may not be valid or that I was engaged in collaborative, disruptive, or other unacceptable behavior during the administration of this examination."

Grounds for Dismissal

Any candidate who does not have proper identification, who uses unauthorized aids, or who does not follow the testing procedures may be dismissed from the test center. ATD CI may choose to have the test scores of such candidates invalidated.

Candidates who engage in misconduct and do not heed the administrator's warning to discontinue the behavior will be dismissed from the test center. All of the following behaviors are considered to be misconduct:

- giving or receiving assistance of any kind, including accepting exam details from another individual, organization, or entity or providing exam details to another individual, organization, or entity. This includes asking or providing information about content on the exam as part of study groups.
- using any unauthorized aids
- attempting to take the examination for someone else

- failing to follow testing regulations or the instructions of the test administrator
- creating a disturbance of any kind
- removing or attempting to remove examination questions or responses (in any format) or notes about the examination from the testing room
- tampering with the operation of the computer or attempting to use it for any function other than taking the examination.

Before an exam is canceled for misconduct, the test administrator will notify the candidate of any concerns. The candidate is then given an opportunity to provide additional information. The test administrator then has the following options:

- Dismiss the candidate and file a report with ATD CI describing the action and the reasons for dismissal.
- Allow the candidate to continue and file an irregularity report with ATD CI describing any observations.

In either event, ATD CI will review that candidate's test record and will make a determination as to the handling of the candidate and the score.

Exam Results

A candidate's score is determined by the number of correct answers selected minus any incorrect answers selected in the case management section. A candidate score is represented on a scale of 200 – 800, with 500 being the required passing score. A consistent passing standard is applied to all candidates equally. A candidate's score does not depend on others who test during the same testing window. There is no pre-determined number of candidates permitted to pass, as ATD CI does not score on a curve.

Candidates who pass the CPTD Exam are considered certified upon receipt of passing scores. Certification is for a three (3) year period that begins on the day certification is achieved and ends three years later at the end of the certification month. For example, a candidate passing the exam on October 12, 2020 is considered certified from October 12, 2020 – October 31, 2023.

How the Cut Score Is Determined

The ATD Certification Institute takes great care in determining the cut score for each exam form. The cut score is established through a process called standard setting, during which a selected panel of current CPTDs conducts a systematic evaluation of the test content. The panel discusses the qualifications for certification and makes a judgment on the level of knowledge and skill an individual needs to be successful on the job. Their expert judgment is translated to a specific cut score on the exam using the statistical Angoff method.

The Angoff method is commonly used to set passing standards in the credentialing industry. Using this method, the panel of experts reviews and evaluates a representative sample of exam items that map to the test content outline. For each item, the group estimates the percentage of qualified candidates who

are expected to answer it correctly. For example, an item rated as 75 percent indicates that three-fourths of the candidates are expected to answer the item correctly. Ratings for each item are then used to compute an overall minimum passing score for the exam and validated by actual candidate performance before the cut or passing score is set. (This is similar to the method of setting par on a golf course.) Once a passing standard is set, it is applied consistently across all candidates.

ATD CI has more than one form of an exam being administered at any given time. A form is the set of 150 measurement opportunities given to a candidate during a testing appointment. Multiple forms are in use at the same time for security of the item bank. These forms are equated by mapping statistical properties and using new items with similar properties to ensure all candidates are having the same standard applied.

ATD CI reports scores as a scaled score on a scale from 200 – 800, with 500 being required to pass. ATD CI does not provide the number of measurement opportunities that must be answered correctly in order to score a 500. This is due to the multiple forms in use at any given time. Each form has its own cut score, which may differ from form to form. An “easier” form, simply due to the make-up of test questions on that form may require candidates to answer more measurement opportunities correctly. Likewise, a “harder” form may require candidates to answer fewer measurement opportunities correctly. This is called equating and ensures a level playing field for all candidates.

Candidates are randomly assigned to a form at the time of application. If a candidate must retake the exam, the candidate is assigned an alternate form of the exam.

Retest Policy

If candidates do not pass their exam, they may retest if their CPTD candidacy has not expired. Candidacy is for eighteen (18) months, beginning the day the candidate is approved to take the exam. A retest fee is required to register to retake the CPTD Exam (see page 9 for fees).

Candidates wishing to retest must wait until the next exam window to retake the exam. If a candidate wishes to retest after their candidacy expires, they must reapply and meet all current eligibility requirements and pay all current fees.

CPTD Achievement

To achieve their CPTD certification, candidates must pass the CPTD Exam. Once this has been accomplished, candidates are permitted to display the CPTD letters after their name. New CPTDs will also receive a CPTD digital badge, lapel pin, and certificate as further recognition of their accomplishment. CPTDs are encouraged to do the following to maximize the impact of their achievement:

- Add the certification to their name on business cards, social media and email signatures.
- Claim and share their digital badge on social media and include it in their email signature or digital resume to communicate their achievement to colleagues and employers.
- Utilize the personal marketing toolkit for credential holders to publicize their achievement.
- Join the CPTD community on LinkedIn and Facebook.
- Maintain the credential through recertification.

Policy on Use of the Certification Mark

This policy is applicable to all individuals certified by the ATD Certification Institute

The ATD Certification Institute (ATD CI) offers the Associate Professional in Talent Development (APTD) and Certified Professional in Talent Development (CPTD) designations.

ATD and ATD CI grant limited permission to individuals who have met all of the certification program eligibility criteria, passed the applicable exam, or maintained their certification per ATD CI's recertification requirements, and received notification of certification from ATD CI to use the APTD or CPTD designation that has been granted to them.

The APTD and CPTD designations are registered trademarks in the United States and its use is protected by applicable trademark law.

This limited permission allows only individuals who are currently in good standing with ATD CI to use the designation as part of one's professional title. Proper uses of the designations include:

- Signature lines
- Business cards
- Letterhead
- Name badges/IDs
- Directory listings
- Marketing materials when linked to an individual (e.g. press releases, ads, etc.)

Acceptable examples:

- Jane J. Torres, CPTD
- Jacque R. Smith, APTD
- Jane D. Jones, Ed.D, APTD
- Jordan Doe, Ph.D., CPTD

Use of the APTD and CPTD designations by individuals who are not currently in good standing with ATD CI (e.g. have not been granted certification, have failed to properly maintain certification), is prohibited. Improper use of the designations or certification trademarks may result in disciplinary or legal action.

An APTD or CPTD credential holder has the responsibility to report the unauthorized use, misuse, or other violation of this Policy to the ATD CI in a timely manner.

This reporting responsibility includes any circumstance where the use of an ATD CI granted certification mark is related to an individual or organization that is not a APTD or CPTD credential holder, or where a certification mark is used improperly by an APTD or CPTD credential holder. Suspected improper use of ATD CI designations should be reported in writing via e-mail to ATD CI at: certification@td.org.

A report of improper use must include a copy of the materials showing the misuse (i.e., copy of a CV, email signature line, business card, online profile, etc.). The complainant must include his or her name and contact details when lodging a complaint. However, such information will be held as confidential.

Within seven (7) business days upon receipt of a report of suspected misuse, ATD CI staff will verify the status of the individual reported to have been misusing the designation. If the individual is currently in good standing with ATD CI, the complainant will be notified as such.

If the individual purportedly misusing the designation is not currently certified in good standing, the ATD CI staff shall contact the individual through a written letter, via a traceable method. The letter shall inquire regarding the use of credential and a request made that the respondent forward any evidence of current certification (copy of certificate or award of certification letter) to ATD CI within 15 days of receipt of the notification. The respondent may also reply acknowledging the improper use with evidence that corrective action has been taken (i.e., removal of the designation from business cards, website, CV, etc.), or with an application to take the appropriate examination to achieve the designation.

If no response is received within the stipulated time frame, the ATD CI shall then request legal counsel to send a cease and desist letter to the individual, demanding a response and applicable mandatory corrective action.

Recertification Guidelines

The CPTD credential is valid for three (3) years. CPTD credential holders must recertify during each three-year recertification period to maintain the credential. The recertification cycle begins the first day of the month after notification of CPTD success. Recertification points must tie directly to one or more areas of expertise within The ATD Talent Development Capability Model. Credential holders must accrue a minimum of 60 points during each three-year recertification cycle. The categories for recertification points are listed in the table below.

Categories	Minimum Required CPTD Points Per Three-Year Period	Maximum Allowable CPTD Points Per Three-Year Period
1. Continuing Education	20	45
2. Speaking and Instructing	0	20
3. On-the-Job Experience	0	20
4. Research and Publishing	0	20
5. Leadership and Recognition	0	20
6. Professional Membership	0	15
Total Points Required	20	60

Credential holders must accrue at least 60 recertification points during their certification cycle to renew their credential. **Certificants must report at least twenty (20) points from the Continuing Education Category.** Points do not need to be earned in all categories, but each category does have a maximum allowable number of points as outlined above. As an alternative, credential holders may elect to retake the certification exam to satisfy the recertification requirements. Fees would apply to retest; see the schedule of fees for more information.

For additional details visit www.td.org/certification/recertification-program

Appendix A: Code of Ethics and Disciplinary Process

All applicants for certification with the ATD Certification Institute must agree to uphold the ATD Certification Institute Code of Ethics. The Code of Ethics itself, and the associated disciplinary process, can be found [here](#).

This Code of Ethics and accompanying Procedures for Review of Conduct were adopted by the ATD Certification Institute Board of Directors on October 23, 2013.

Summary

The ATD Certification Institute (“ATD CI”) is a nonprofit, tax-exempt organization created by the American Society for Talent Development (“ATD”) to set professional industry standards for the talent development profession. 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. The Candidate Agreements—referenced in the CPTD Handbook (Appendix B)—provide further detail on policies and rules to which candidates must adhere. Individuals who have earned the Certified Professional in Talent Development (“CPTD”) credential and those who have applied to the program must affirm their endorsement of the Code and acknowledge their commitment to uphold its principles, and agree to the policies and rules set forth in the CPTD Handbook. Violations of provisions 14 of the Code or Candidate Agreements may result in sanctions imposed under the Procedures for Review of Conduct (the “Procedures”). These Procedures were adopted to provide due process to individuals who have earned the CPTD credential and other Covered Individuals to protect the integrity and ensure the efficacy of the Code and policies of the CPTD Program.

ATD CI Code of Ethics

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.

Procedures for Review of Conduct

I. Introduction

The following Procedures for Review of Conduct (the “Procedures”) are the only rules and procedures for processing and reviewing possible violations of provisions 1-4 of the ATD CI Code of Ethics, CPTD program rules and policies, or any provision of applicable law. These Procedures are applicable to: (1) all individuals who hold the CPTD credential; and (2) individuals who apply to commence the CPTD certification process (throughout these Procedures, the individuals to whom these Procedures apply may be referred to collectively as “Covered Individuals”). Covered Individuals acknowledge and agree that the Procedures establish a fair process for resolving all potential misconduct violations; and Covered Individuals further acknowledge and agree that they will be bound by decisions made, and sanctions issued, pursuant to the Procedures.

These Procedures shall apply to all complaints, allegations, or inquiries received about a Covered Individual, whether initiated by another individual holding the CPTD credential, ATD CI or its agents, or other third party. Actions taken under these Procedures do not constitute enforcement of the law, although referral to appropriate federal, state, or local government agencies may be made in connection with a Covered Individual’s conduct in appropriate situations. Individuals bringing complaints are not entitled to any relief or damages by virtue of these Procedures, although they will receive notice of the actions taken. Complaints essentially of a commercial nature, primarily involving claims of libel or slander, or primarily requesting judicial-type relief, may not be considered under these Procedures unless they also involve potential violations of provisions 1-4 of the Code of Ethics, CPTD program rules and policies, or otherwise are included in the grounds for disciplinary action set forth herein.

Notices provided under these Procedures shall be delivered to the delivery address on file with ATD CI using either registered mail or reliable delivery service with signature required by the recipient. Parties are responsible for maintaining up-to-date delivery addresses with ATD CI.

II. Grounds for Disciplinary Action

The grounds for disciplinary action are as follows:

- A. Gross negligence or willful misconduct in the performance of services, or other unethical or unprofessional conduct based upon demonstrable or serious violations of provisions 1-4 of the ATD CI Code of Ethics, or applicable rules or policies.
- B. Conviction of a Covered Individual of a felony or other crime of moral turpitude under federal or state law, which impacts their ability to effectively practice in the talent development profession.
- C. Fraud or misrepresentation in the application, testing process, or maintenance of ATD CI certification, industry certification, or other professional recognition or credential, including cheating or plagiarism during any aspect of the certification and maintenance process.

III. Development and Administration of Procedures

- A. The ATD CI Board of Directors (the “CI Board”) is responsible for the development and administration of these Procedures; however, the Professional Conduct Review Committee

(the “Review Committee”) is delegated to administer these Procedures on behalf of the CI Board.

- B. The Chair of the Professional Conduct Review Committee (the “Review Committee Chair”) is specifically responsible for ensuring that these Procedures are implemented and followed.
- C. All members of the CI Board, ATD staff, members of the Review Committee, and other individuals engaged in investigations or decisions on behalf of ATD CI with respect to any complaint, allegation, or inquiry under these Procedures are indemnified and shall be defended by ATD CI against any liability arising from related activities to the extent permitted by law, provided such individuals act in good faith and with reasonable care, without gross negligence or willful misconduct, and do not breach any fiduciary duty owed to ATD CI. No one who has any personal involvement in the alleged misconduct or any conflict of interest shall be permitted to participate in the matter to be reviewed.

IV. Complaints

- A. Complaints may be transmitted to ATD CI by any individual or entity, but must be set forth in writing on the Complaint Form of the ATD CI Code of Ethics. A copy of the Complaint form is available through ATD CI upon request. In addition, the CI Board Chair may self-initiate an inquiry if circumstances warrant. Inquiries or submissions other than properly submitted complaints may be handled by ATD CI at its discretion. All such complaints, allegations, inquiries, or submissions relating to the Code are directed to the Review Committee Chair. Upon receipt and preliminary review of any such submission, the Review Committee Chair may conclude, in his or her sole discretion, that the submission: (1) contains facially unreliable or insufficient information; or (2) is patently frivolous or trivial. In such cases, the Review Committee Chair may determine that the submission does not constitute a potentially actionable complaint that would justify bringing it before the Review Committee, as defined in Section V, for determination of whether there has been a violation of provisions 1-4 the Code. If so, such submission shall be disposed of by the Review Committee Chair, and notice to its submitter shall be provided by the Review Committee Chair, if the submitter is identified. All such preliminary dispositions by the Review Committee Chair shall be reported to the CI Board Chair and the President of ATD CI.
- B. If a submission is deemed by the Review Committee Chair to be a potentially actionable complaint, the Review Committee Chair shall see that written notice is provided to the Covered Individual whose conduct has been called into question, advising the Covered Individual that an investigation is being initiated, providing the Covered Individual with a copy of the complaint documentation, and advising the Covered Individual that the Covered Individual shall submit a written response within thirty (30) days of the date of the notice. The Review Committee Chair also shall provide notice to the individual submitting the complaint that the complaint is being reviewed by ATD CI.

V. Review Panel

- A. For each complaint involving an alleged violation the Review Committee Chair believes is potentially actionable, the Review Committee Chair shall convene a Review Panel made up of three persons.

- B. The Review Committee Chair shall select members of the Review Panel from among a group of individuals selected in advance by the CI Board to be potential Review Committee members. The CI Board Chair shall be notified when members are selected to a Review Panel to address a complaint. Each member of the Review Committee may hold the Certified Professional in Talent Development (“CPTD”) credential from ATD CI, may be a CPTD Fellow, and/or have other expertise in the field.
- C. The Review Committee Chair will authorize, and members of the Review Panel will be tasked with investigating the specific facts and circumstances to whatever extent necessary to clarify, expand, or corroborate the information provided by the submitter, and deciding as to whether charges, and what charges, against the Covered Individual should be brought, pursuant to these Procedures.

VI. Review of Complaint

- A. For each submission involving an alleged violation of the Code that the Review Committee Chair believes is a potentially actionable complaint, the Review Committee Chair shall authorize a three (3) person Review Panel (from among members of the Review Committee) to investigate its specific facts or circumstances to whatever extent is necessary to clarify, expand, or corroborate the information provided by the submitter. The Review Panel may be assisted in the conduct of its investigation by ATD staff and/or legal counsel.
- B. The Review Panel may determine that it would be appropriate to discontinue consideration of the matter due to: (1) the existence of another proceeding before another professional body, a court, or a government agency; or (2) a determination that the nature of the allegations dictate that the matter should be referred to another entity engaged in the administration of law.
- C. The Review Panel may contact the individual submitting the complaint and the Covered Individual for information in addition to the initial complaint and response. The time for providing such additional information shall be established by the Review Panel, and the individuals shall be given not less than 15 days to respond. The Review Panel may, at its discretion, contact such other individuals who may have knowledge of the facts and circumstances surrounding the complaint.
- D. If, after an initial review, the Review Panel concludes that formal charges may be warranted, the Review Panel shall provide the Review Committee Chair, CI Board Chair, and President of ATD CI with notice of such conclusion and a copy of the Review Panel’s initial report. The President of ATD CI shall notify the Covered Individual to be charged and send the Covered Individual a copy of the charges and the Review Panel’s report. The Covered Individual shall be advised that he or she may request the opportunity to submit information or arguments contesting the charge in writing, by submitting such request within 30 days of receipt of the notice. The Covered Individual shall also be sent a copy of these Procedures.
- E. No member of the Review Panel should have an anticompetitive or commercial reason for applying sanctions against the Covered Individual, or otherwise have any conflict of interest with respect to the Covered Individual or the conduct resulting in the investigation. Members of the Review Panel have a responsibility to identify any potential or actual conflicts they may have and bring such conflicts to the attention of the CI Board Chair. With the agreement of the CI Board Chair, members of the Review Panel may recuse themselves due to a conflict of interest. The vacant seat will be filled by a different member of the

Review Committee. The Covered Individual who is the subject of the investigation shall be provided with a list of the individuals making up the Review Committee.

- F. All investigations and deliberations of the Review Panel are to be conducted in confidence to the extent practical, except that the Review Panel shall be permitted to disclose any relevant information when compelled by a validly issued subpoena or other government order or request, when otherwise required by law, or to parties essential to the review and investigation of the alleged aggrieved conduct, including, without limitation, potential witnesses. All written communications relating to the investigations and deliberations of the Review Panel should be sealed and marked "Personal and Confidential." All investigations and deliberations of the Review Panel shall be conducted objectively, without prejudgment of any kind. An investigation may be directed toward any aspect of a complaint that is relevant or potentially relevant.
- G. The Review Panel meetings may be held in person or virtually as determined by the Review Committee Chair. The Review Committee Chair shall preside and make evidentiary and other procedural rulings with the advice of ATD CI legal counsel. Written statements may be submitted in advance of Review Panel meetings and accepted as evidence within reasonable deadlines established by the Review Committee Chair and communicated to the Covered Individual.

VII. Determination of Violation

- A. Upon completion of its investigation and the hearing, the Review Panel shall determine by majority vote, upon a preponderance of the evidence, whether there has been a violation of the Code, and whether sanctions should be imposed. When the Review Panel finds that there has been a violation, it shall also determine the appropriate sanction. If the Review Panel so recommends, a written determination with the applicable sanction shall be prepared under the supervision of the Review Committee Chair, a copy of which shall be provided to the CI Board Chair and President of ATD CI, along with the record of the Review Panel's investigation and deliberation. Written notice of the Review Panel's determination and the proposed sanctions shall be provided to the charged Covered Individual within 15 days of the Review Panel's determination. If the Review Panel determines that a violation has not occurred, the complaint shall be dismissed with notice to the Covered Individual, as well as to the individual or entity who submitted the complaint; a summary report shall also be provided to the CI Board Chair.
- B. In certain circumstances, the Review Panel may determine that the Covered Individual in violation of the Code should be offered the opportunity to submit a written assurance that the conduct in question has been terminated and will not recur, with the expectation that such written assurance would be taken into consideration by the Review Panel when deciding whether to pursue charges and, if applicable, what sanction to impose. If such an offer is extended, the Covered Individual at issue must submit the required written assurance within 30 days of receipt of the offer, and the assurance must be submitted in terms that are acceptable to the Review Panel.

VIII. Sanctions

- A. Any of the following sanctions may be imposed by the Review Panel upon a Covered Individual whom the Review Panel has determined to have violated the Code, specifically, whose conduct the Review Panel has determined constitutes one or more of the grounds for disciplinary action. The sanction applied must reasonably relate to the nature and

severity of the violation, focusing on reformation of the conduct of the Covered Individual and deterrence of the same or similar conduct by others. The sanctions include:

1. Private written reprimand to the Covered Individual;
2. Suspension of the Covered Individual's CPTD credential or candidacy for a designated period; or
3. Permanent removal of the Covered Individual's CPTD credential or candidacy.

For each of these three sanctions, a summary of the determination and the sanction, along with the Covered Individual's name, may be published more broadly at the discretion of the Review Panel. No publication shall occur until either an appeal has been concluded in the applicable case or the deadline to file an appeal has passed without such appeal being filed.

IX. Appeal

- A. Within 30 days of the date of notice of a determination by the Review Panel that a Covered Individual has violated the Code, the affected Covered Individual may submit to the CI Board in writing on the Code of Ethics Review of Conduct Appeals form a request for an appeal. The form will be sent to the individual as part of the summary of determination and sanction correspondence mentioned in the preceding sections. CI Board members shall follow the terms of the CI Board Conflicts of Interest policy in connection with any filed appeal.
- B. The CI Board may only review the record to review whether the determination by the Review Panel of a violation of the Code was inappropriate because of: (1) material errors of fact, or (2) failure of the Review Panel to conform to published criteria, policies, or procedures. The standard of review by the CI Board in making this determination in each instance shall be whether the Review Panel's actions were clearly erroneous. Only facts and conditions up to and including the time of the Review Panel's determination, as represented by facts known to the Review Panel, may be considered during an appeal. The appeal shall not include a hearing or any similar trial-type proceeding and shall be considered and decided based solely on written submissions.
- C. The CI Board shall conduct and complete the appeal within 90 days of receipt of the request for an appeal. Written appellate submissions and any reply submissions may be made by authorized representatives of the Covered Individual and of the Review Panel. Submissions shall be made according to whatever schedule is reasonably established by the CI Board. The decision of the CI Board shall either affirm or overturn the determination by the Review Panel that a violation of the Code has occurred, but the CI Board shall not address any sanction(s) imposed by the Review Panel. If significant deficiencies are found, the CI Board may refer the matter back to the Review Panel for further and final action. The decision of the CI Board, including a statement of the reason(s) for the decision, shall be reported to the Review Panel. The decision of the CI Board shall be binding upon ATD CI and the Covered Individual.

X. Resignation

- A. If a Covered Individual who is the subject of a complaint voluntarily surrenders his or her CPTD credential at any time during the pendency of a complaint under these Procedures, the complaint shall be dismissed without any further action by the Review Panel or the CI

Board. In such instance, the entire record shall be sealed and the Covered Individual may not apply for the CPTD credential for five (5) years. The CI Board may authorize the President of ATD CI to communicate the fact and date of resignation, and the fact and general nature of the complaint which was pending at the time of resignation, to or at the request of a government entity engaged in the administration of law or a potential employer who requires reasonable knowledge of whether the Covered Individual holds the CPTD credential. Similarly, in the event of such resignation, the person or entity who submitted the complaint shall be notified of the fact and date of the resignation and that the Board has dismissed the complaint as a consequence.

Appendix B: CPTD Program Applicant Declaration & Release

I hereby submit this application to the ATD Certification Institute (or “ATD CI”) to be a Certified Professional in Talent Development (CPTD) in accordance with and subject to ATD CI's standards, rules, policies, and procedures. I understand that ATD CI and/or ATD may use the information gathered in the certification process for statistical purposes for the evaluation of the certification program, or for other research or study. I further understand that ATD CI will use reasonable efforts to keep the information in its possession confidential.

I understand that ATD CI reserves the right to verify any or all the information associated with or required by this application, and that providing false or misleading information, omitting required information, or otherwise violating the rules of certification, may result in appropriate disciplinary action. I further understand that I must immediately inform ATD CI of any changed circumstances that may affect this application and the information that has been provided, or that may affect my continuing certification eligibility.

I understand that I can be disqualified from taking or completing the examination, or from receiving examination scores if ATD CI determines through either proctor observation or statistical analysis that I have engaged in collaborative, disruptive, or other inappropriate behavior during administration of the examinations. I agree that I will not list my passing status on any professional stationary or business cards, nor will I use it in any advertising until I have passed both exams (the Knowledge Exam and the Skills Application Exam) of ATD CI CPTD program.

I, the undersigned, recognize that ATD CI is the sole and only judge of my qualification to receive and maintain certification. I further recognize that ATD CI reserves the right to modify or alter at any time the certification standards, the requirements for certification and/or recertification, and any rules, policies, or procedures in connection therewith.

I authorize ATD CI to include my name and contact information in any publicly available lists or directories in which the names of Certified Learning and Performance Professionals (CPTDs) are published, and hereby waive any rights of objections to such listings.

I understand and agree that ATD CI owns all right, title, and interest in and to all names, trademarks, logos, copyrights, applications, and other material related to ATD CI and ATD CI's CPTD program, and I agree that I shall only use such intellectual property in accordance with policies promulgated by ATD CI and agree to cease using such intellectual property upon the expiration, suspension, or termination of my certification.

I understand and agree that neither ATD CI nor ATD makes any claims, warranties, guarantees, or promises regarding the content or performance of any Certified Professional in Talent Development (CPTD); and I agree not to misrepresent my certification status and its meaning.

I, the undersigned, do hereby attest to the accuracy and validity of, and assume full responsibility for, the content of my application and all materials and information submitted to ATD CI.

In consideration of my application to and participation in ATD CI's CPTD program, I, the undersigned, do hereby release, discharge, and hold harmless individually and collectively ATD CI, ATD, and their officers, directors, employees, committee and commission members, members, subsidiaries, agents, successors, and assigns, from any and all liability 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 of ATD CI to grant certification or recertification to me, the revocation of my certification, or ATD CI's certification standards. This release and waiver of liability shall be binding on my heirs, executors, administrators, successors, and assigns.

I also understand and agree that in considering this application, ATD CI may make inquiry of such persons or entities, inspect such records, and make and retain copies of such materials as ATD CI deems appropriate. Without limiting the generality of the foregoing, I hereby authorize ATD CI to make such inquiries regarding my fitness for certification and authorize any persons or entities contacted by ATD CI to respond to such inquiries and provide copies of any relevant and non-confidential information to ATD CI. I further authorize ATD CI to provide a copy of this statement to those entities contacted by ATD CI about this application.

CPTD Program Candidate Intent to Participate

I intend to participate in ATD CI's CPTD program and I agree to the following:

- My data can be released for research purposes and published as part of the program analysis.
- I will follow ATD CI's Code of Ethics and Intellectual Property policy as may be amended from time to time by ATD CI.
- I will provide a professional demographic profile to be used for research purposes and collected at the time of examination.
- I will pay a nonrefundable exam fee in the amount specified in the program materials.
- I meet the eligibility requirements.
- I give my permission for ATD CI to release my name publicly if I obtain the CPTD credential.
- I have read and understand all the CPTD program materials and the CPTD requirements in the CPTD Certification Handbook, including but not limited to the refund, transfer, deadlines, and appeals policies.

In return, all participating professionals will be provided:

- a seat and score report for the CPTD Exam

I agree to the following:

- The exam fee is nonrefundable unless ATD CI does not fulfill the aforementioned terms. All candidates are expected to participate in all aspects of the program for which they are eligible.
- To ensure the privacy and protection of all candidates, ATD CI and ATD representatives can only respond to candidates directly and cannot speak or correspond with anyone calling or writing on a candidate's behalf.

Appendix C: CPTD Gap Assessment

ATD Certification Institute's Gap Assessment will help determine your readiness for the CPTD certification exam. It can also help you identify personal strengths and areas for growth to support your professional development objectives and help you acquire or strengthen skills and competencies required for success as a talent development professional.

The certification exam and this Gap Assessment is built on the Detailed Content Outline for the CPTD, which details the knowledge, skills and abilities needed to be a successful and effective talent development professional in today's rapidly changing environment.

The CPTD Detailed Content Outline is a subset of knowledge and skills from the three domains of practice found in the Talent Development Capability Model that have been determined to be necessary for successful and effective practice in talent development for someone with five (5) years of experience.

- I. Building Personal Capability – 20%
- II. Developing Professional Capability – 45%
- III. Impacting Organizational Capability – 35%

Under each of these essential capability areas are specific knowledge and skill statements identified in the Detailed Content Outline. This Gap Assessment is constructed from those statements.

In each section of the Gap Assessment, you should review the knowledge and skill required. Using the keys provided, consider your current level of understanding and experience in each task area. This is your personal assessment of your competence, honesty with yourself is important. Then, determine the gap, if any, that exists and whether any additional development on your part is needed. This exercise will help you assess your current readiness for the CPTD certification exam and identify areas where additional experience, study, or mentoring would be beneficial.

Completing this Gap Assessment does not ensure mastery of the competencies required for the CPTD certification exam but helps you assess your readiness, identify your current strengths, and chart a plan for gaining knowledge and skills in areas of desired growth.

Proficiency

- 1 - Little or None - Little knowledge and little to no skill in this area.
- 2 - Limited Proficiency - Limited ability to perform this skill. General, conceptual knowledge or awareness only.
- 3 - Consistent Proficiency - Perform skill consistently. Apply knowledge of the skill area.
- 4 - Advanced Proficiency - Perform skill consistently. Apply in-depth knowledge of the skill area. Lead or direct others in performing this skill.
- 5 - Exceptional Proficiency - Provide expert advice, lead others, and make sound judgments. Provide consultation and leadership to others in the form of this skill. Apply comprehensive knowledge.

Development Gap

- 3 – Little or no development needed
- 2 – Some development needed
- 1 – Considerable development needed

Certified Professional in Talent Development (CPTD)		
Building Personal Capability – 20%		
Knowledge and Skill Statements	Proficiency	Gap
1.1 Communication		
1.1.A Skill in using communication strategies that inform and influence audiences.	1 2 3 4 5	1 2 3
1.1.B Skill in applying verbal, written, and/or non-verbal communication techniques.	1 2 3 4 5	1 2 3
1.1.C Skill in conceiving, developing, and delivering information in various formats and media.	1 2 3 4 5	1 2 3
1.2 Emotional Intelligence & Decision-Making		
1.2.A Knowledge of theories of emotional intelligence.	1 2 3 4 5	1 2 3
1.3 Collaboration & Leadership		
1.3.A Knowledge of theories, methods, and techniques to build and manage professional relationships, for example group dynamics, teamwork, shared experience, and negotiation.	1 2 3 4 5	1 2 3
1.3.B Knowledge of conflict management techniques.	1 2 3 4 5	1 2 3
1.3.C Knowledge of theories of leadership, for example transformational, inclusive, and situational.	1 2 3 4 5	1 2 3
1.4 Cultural Awareness & Inclusion		
1.4.A Skill in integrating diversity and inclusion principles in talent development strategies and initiatives.	1 2 3 4 5	1 2 3
1.5 Project Management		
1.5.A Skill in evaluating and prioritizing implications, risks, feasibility, and consequences of potential activities.	1 2 3 4 5	1 2 3
1.5.B Skill in establishing, monitoring, and communicating progress toward the achievement of goals, objectives, and milestones.	1 2 3 4 5	1 2 3
1.6 Compliance & Ethical Behavior		
1.6.A 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.	1 2 3 4 5	1 2 3

Proficiency

1 - Little or None - Little knowledge and little to no skill in this area.

2 - Limited Proficiency - Limited ability to perform this skill. General, conceptual knowledge or awareness only.

3 - Consistent Proficiency - Perform skill consistently. Apply knowledge of the skill area.

4 - Advanced Proficiency - Perform skill consistently. Apply in-depth knowledge of the skill area. Lead or direct others in performing this skill.

5 - Exceptional Proficiency - Provide expert advice, lead others, and make sound judgments. Provide consultation and leadership to others in the form of this skill. Apply comprehensive knowledge.

Development Gap

3 – Little or no development needed

2 – Some development needed

1 – Considerable development needed

Developing Professional Capability – 45%		
Knowledge and Skill Statements	Proficiency	Gap
2.1 Learning Sciences		
2.1.A 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.	1 2 3 4 5	1 2 3
2.1.B Knowledge of the foundational learning theories of behaviorism, cognitivism, and constructivism.	1 2 3 4 5	1 2 3
2.2 Instructional Design		
2.2.A Skill in selecting and aligning delivery options and media for training and/or learning events to the desired learning or behavioral outcomes.	1 2 3 4 5	1 2 3
2.2.B Skill in developing learning and behavioral outcome statements.	1 2 3 4 5	1 2 3
2.2.C Skill in designing blueprints, schematics, and/or other visual representations of learning and development solutions, for example wireframes, storyboards, and mock-ups.	1 2 3 4 5	1 2 3
2.2.D Skill in designing and/or 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.	1 2 3 4 5	1 2 3
2.3 Training Delivery & Facilitation		
2.3.A Knowledge of facilitation methods and techniques.	1 2 3 4 5	1 2 3
2.4 Technology Application		
2.4.A Skill in identifying, selecting, and/or implementing learning technologies, for example using evaluative criteria and identifying appropriate applications in an instructional environment.	1 2 3 4 5	1 2 3
2.4.B Skill in selecting, integrating, managing, and/or maintaining learning platforms, for example learning management systems, knowledge management systems, and performance management systems.	1 2 3 4 5	1 2 3
2.5 Knowledge Management		
2.5.A Skill in curating instructional content, tools, and resources, for example researching, evaluating, selecting, and/or assembling publicly available online courseware.	1 2 3 4 5	1 2 3
2.5.B Skill in designing and implementing knowledge management strategy.	1 2 3 4 5	1 2 3
Knowledge and Skill Statements	Proficiency	Gap
2.6 Career & Leadership Development		
2.6.A Skill in sourcing, designing, building, and evaluating leadership development experiences.	1 2 3 4 5	1 2 3
2.6.B Knowledge of how to develop and implement qualification programs.	1 2 3 4 5	1 2 3

2.7 Coaching		
2.7.A Skill in helping individuals or teams identify goals, develop realistic action plans, seek development opportunities, and monitor progress and accountability.	1 2 3 4 5	1 2 3
2.7.B Skill in coaching supervisors and managers on methods and approaches for supporting employee development.	1 2 3 4 5	1 2 3
2.8 Evaluating Impact		
2.8.A Knowledge of models and methods to evaluate the impact of learning and talent development solutions.	1 2 3 4 5	1 2 3
2.8.B Skill in creating data collection tools, for example questionnaires, surveys, and structured interviews.	1 2 3 4 5	1 2 3
2.8.C Skill in identifying and defining individual and/or organizational outcome metrics based on evaluation strategy and/or business objectives of a solution.	1 2 3 4 5	1 2 3
Impacting Organizational Capability – 35%		
Knowledge and Skill Statements	Proficiency	Gap
3.1 Business Insight		
3.1.A Skill in creating business cases for talent development initiatives using economic, financial, and organizational data.	1 2 3 4 5	1 2 3
3.1.B Skill in managing budgets and resources.	1 2 3 4 5	1 2 3
3.2 Consulting & Business Partnering		
3.2.A Skill in synthesizing information to formulate recommendations or a course of action to gain agreement, support, and/or buy-in from stakeholders.	1 2 3 4 5	1 2 3
3.2.B Skill in establishing and managing organizational and/or business partnerships and relationships.	1 2 3 4 5	1 2 3
3.2.C Skill in partnering with other organizational units to provide guidance on departmental or organizational talent requirements.	1 2 3 4 5	1 2 3
3.2.D Skill in identifying, minimizing, and overcoming organizational barriers to implementing talent development solutions and/or strategies.	1 2 3 4 5	1 2 3

Proficiency

1 - Little or None - Little knowledge and little to no skill in this area.

2 - Limited Proficiency - Limited ability to perform this skill. General, conceptual knowledge or awareness only.

3 - Consistent Proficiency - Perform skill consistently. Apply knowledge of the skill area.

4 - Advanced Proficiency - Perform skill consistently. Apply in-depth knowledge of the skill area. Lead or direct others in performing this skill.

5 - Exceptional Proficiency - Provide expert advice, lead others, and make sound judgments. Provide consultation and leadership to others in the form of this skill. Apply comprehensive knowledge.

Development Gap

3 – Little or no development needed

2 – Some development needed

1 – Considerable development needed

Knowledge and Skill Statements	Proficiency	Gap
3.3 Organization Development & Culture		
3.3.A Skill in designing and implementing organizational development strategy.	1 2 3 4 5	1 2 3
3.3.B 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.	1 2 3 4 5	1 2 3
3.3.C Skill in identifying formal and informal relationships, hierarchies, and power dynamics in an organization.	1 2 3 4 5	1 2 3
3.3.D Skill in creating a culture which encourages and/or creates opportunities for dialogue and feedback between individuals and groups, for example designing collaborative work practices and/or spaces, and role-modeling effective feedback techniques.	1 2 3 4 5	1 2 3
3.3.E Skill in assessing and evaluating employee engagement.	1 2 3 4 5	1 2 3
3.3.F Skill in designing and implementing employee engagement strategy.	1 2 3 4 5	1 2 3
3.4 Talent Strategy & Management		
3.4.A Skill in designing and implementing performance management strategy.	1 2 3 4 5	1 2 3
3.4.B Skill in developing a talent strategy that aligns to organizational strategy to influence organizational outcomes in a positive direction.	1 2 3 4 5	1 2 3
3.4.C Skill in designing and implementing strategic plans for talent development projects, programs, and/or functions.	1 2 3 4 5	1 2 3
3.4.D Skill in identifying anticipated constraints or problems affecting talent development initiatives, for example resource deficiencies or lack of support.	1 2 3 4 5	1 2 3
3.4.E Skill in establishing and executing a marketing strategy to promote talent development.	1 2 3 4 5	1 2 3
3.4.F Skill in designing and implementing communication strategy in order to drive talent management objectives	1 2 3 4 5	1 2 3
3.4.G Skill in communicating how talent development strategies and solutions support the achievement of targeted business/organizational results.	1 2 3 4 5	1 2 3
3.4.H Skill in communicating the value of lifelong learning and professional development.	1 2 3 4 5	1 2 3

Proficiency

1 - Little or None - Little knowledge and little to no skill in this area.

2 - Limited Proficiency - Limited ability to perform this skill. General, conceptual knowledge or awareness only.

3 - Consistent Proficiency - Perform skill consistently. Apply knowledge of the skill area.

4 - Advanced Proficiency - Perform skill consistently. Apply in-depth knowledge of the skill area. Lead or direct others in performing this skill.

5 - Exceptional Proficiency - Provide expert advice, lead others, and make sound judgments. Provide consultation and leadership to others in the form of this skill. Apply comprehensive knowledge.

Development Gap

3 – Little or no development needed

2 – Some development needed

1 – Considerable development needed

Knowledge and Skill Statements	Proficiency	Gap
3.5 Performance Improvement		
3.5.A Skill in designing and implementing performance support systems and tools, for example instructional resources, data, process models, job aids, and expert advice.	1 2 3 4 5	1 2 3
3.5.B Skill in designing and developing performance improvement solutions to address performance gaps.	1 2 3 4 5	1 2 3
3.5.C Skill in conducting performance analysis to identify goals, gaps, or opportunities.	1 2 3 4 5	1 2 3
3.5.D 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.	1 2 3 4 5	1 2 3
3.5.E Knowledge of theories, models, and principles of human performance improvement.	1 2 3 4 5	1 2 3
3.6 Change Management		
3.6.A Knowledge of change management theories and models, for example Lewin, Kotter, Bridges' transition model, Kubler-Ross change curve, and appreciative inquiry.	1 2 3 4 5	1 2 3
3.7 Data & Analytics		
3.7.A Skill in selecting and/or using data visualization techniques, for example flow charts, graphs, plots, word clouds, and heat maps.	1 2 3 4 5	1 2 3
3.7.B Skill in identifying stakeholders' needs, goals, requirements, questions, and objectives to develop a framework and/or plan for data analysis.	1 2 3 4 5	1 2 3
3.7.C Skill in analyzing and interpreting results of data analyses to identify patterns, trends, and relationships among variables.	1 2 3 4 5	1 2 3
3.7.D Skill in gathering and organizing data from internal and/or external sources in logical and/or practical ways to support retrieval and manipulation.	1 2 3 4 5	1 2 3
3.8 Future Readiness		
3.8.A Knowledge of techniques to promote, support, and/or generate innovation and creativity, for example design thinking, brainstorming, and ideation.	1 2 3 4 5	1 2 3
3.8.B Knowledge of internal and external factors that influence talent development, for example organizational/business strategies, availability of labor, developments in other industries, societal trends, and technological advances.	1 2 3 4 5	1 2 3

Proficiency

1 - Little or None - Little knowledge and little to no skill in this area.

2 - Limited Proficiency - Limited ability to perform this skill. General, conceptual knowledge or awareness only.

3 - Consistent Proficiency - Perform skill consistently. Apply knowledge of the skill area.

4 - Advanced Proficiency - Perform skill consistently. Apply in-depth knowledge of the skill area. Lead or direct others in performing this skill.

5 - Exceptional Proficiency - Provide expert advice, lead others, and make sound judgments. Provide consultation and leadership to others in the form of this skill. Apply comprehensive knowledge.

Appendix D: Sample Case Management Questions

CPTD Case Management Questions

In developing its revised exams, ATD CI wanted to be sure our exams presented modern assessment tools and reflected real-world scenarios to assess a candidates ability to apply their knowledge. As a result, we have incorporated case management questions into the new CPTD exam.

Case management questions assess candidates' ability to analyze and respond to a situation that talent development (TD) professional may encounter. Each case has three or four steps. In each step information is provided on the left side of the screen and a question with several potential actions or responses is presented on the right side of the screen.

Additional information is added at each step in the case. The information from previous steps remains on the left side of the screen with new information added below it.

For each step, a candidate selects as many actions or responses as are needed to appropriately respond to the situation as presented. Candidates should only select actions that are necessary at the current step or stage. Candidates should not select actions or responses that are not needed, not yet needed, or not appropriate at this point in the scenario.

Candidates **MUST** select **at least one** action or response for each step; **however, more than one action or response may be correct.**

Those actions or responses that are appropriate for this step which the candidate does select will be scored as +1 point. Selecting actions or responses that are not needed, not appropriate, or incorrect for this stage will be scored as -1 point. Points are not awarded or lost for actions or responses not selected.

Once a candidates moves to the next step or stage in a case, the candidate **CAN NOT** go back to previous steps in that case and change their answer. This is because information provided in the next step may provide the answer to a previous step. However, the scenario information from the prior steps in each case is repeated on subsequent steps candidates do not have to go back to review previous information.

Once a candidate completes a step and moves forward to the next step, the answer **CAN NOT** be changed for a previous step.

Sample Question A	
Candidate Name	
<u>Calculator</u>	
Step 1	
<p>A TD professional in a large hospital system is tasked with developing and delivering a training for how to use ultrasound equipment in the emergency room. The TD professional does not have any clinical or medical equipment expertise.</p>	<p>What should the TD professional do in the initial phase of the project prior to the selection of a subject matter expert (SME)?</p> <ul style="list-style-type: none"> ○ Identify the audience for the training ○ Establish learning objectives ○ Identify the appropriate learning approach ○ Develop clear guidelines on role and responsibilities of the SME. ○ Select a training location ○ Determine training time frame
<u>End Exam</u>	<u>Next -></u>

Sample Question A	
Candidate Name	
<u>Calculator</u>	
Step 1	
A TD professional in a large hospital system is tasked with developing and delivering a training for how to use ultrasound equipment in the emergency room. The TD professional does not have any clinical or medical equipment expertise.	<p>What qualifications should the TD professional require in the SME?</p> <ul style="list-style-type: none"> <input type="radio"/> Relevant healthcare experience <input type="radio"/> In-depth clinical knowledge <input type="radio"/> Recent clinical training on the equipment <input type="radio"/> Experience with a variety of learning approaches <input type="radio"/> Knowledge of adult learning principles <input type="radio"/> Prior mentoring and coaching experience <input type="radio"/> Ability to manage difficult learners in a classroom setting
Step 2	
After identifying the audience for the training, the TD professional begins the process of selecting a technical SME to assist in developing the training content.	
<u>End Exam</u>	<u>Next -></u>

Sample Question A	
Candidate Name	
<u>Calculator</u>	
Step 1	<p>What should the TD professional do while working with the SME?</p> <ul style="list-style-type: none"> ○ Show appreciation of the SME's contribution ○ Provide clear guidelines on roles and responsibilities ○ Makes the SME part of the instructional design team ○ Pay attention to the needs of the SME ○ Encourage the SME to include personal experiences with the equipment in the training content ○ Ensure high reimbursement for the SMEs time
<p>A TD professional in a large hospital system is tasked with developing and delivering a training for how to use ultrasound equipment in the emergency room. The TD professional does not have any clinical or medical equipment expertise.</p>	
Step 2	
<p>After identifying the audience for the training, the TD professional begins the process of selecting a technical SME to assist in developing the training content.</p>	
Step 3	
<p>The TD professional has selected a technical SME to assist with the development of the ultrasound training.</p>	
<u>End Exam</u>	<u>Next -></u>

< END >

Sample Question B**Candidate Name**Calculator**Step 1**

A mid-sized manufacturing company has problems with low trust, high absenteeism, and significant turnover. The Chief Executive Office (CEO) asks the talent development (TD) manager to develop a culture improvement program to help people work better together and reduce conflict between teams.

What should the TD manager do?

- ☐ Start to plan who will attend culture improvement sessions.
- ☐ Ask the CEO for more detail about the source of the problems.
- ☐ Plan a needs analysis to determine the root causes of the issues.
- ☐ Identify which teams are at odds with other teams.
- ☐ Discuss with the CEO the vision for success of the culture improvement program
- ☐ Prepare a list of potential company values for the CEO to select

End ExamNext ->

Sample Question B	
Candidate Name	
<u>Calculator</u>	
Step 1	<p>How should the TD manager react to this input?</p> <ul style="list-style-type: none"> ○ Start designing training for the teams identified by the CEO. ○ Suggest a meeting with the senior leadership team to discuss the results of the research ○ Conduct an organization-wide survey to find out the true cause of the problem. ○ Provide the CEO with examples of the role of senior leadership in culture improvement ○ Recommend that leadership team members participate in the training sessions. ○ Inform the CEO that just training the identified teams may not resolve the cultural issues.
<p>A mid-sized manufacturing company has problems with low trust, high absenteeism, and significant turnover. The Chief Executive Office (CEO) asks the talent development (TD) manager to develop a culture improvement program to help people work better together and reduce conflict between teams.</p>	
Step 2	
<p>The needs analysis is now complete and indicates that and many employees lack confidence in leadership. The CEO reviews the needs analysis and agrees that the marketing team ignores the production team, the research team does not trust the engineering team, but disagrees that there are problems at the senior leadership level. The CEO requests that the training begin as soon as possible.</p>	
<u>End Exam</u>	<u>Next -></u>

Sample Question B**Candidate Name**Calculator**Step 1**

A mid-sized manufacturing company has problems with low trust, high absenteeism, and significant turnover. The Chief Executive Office (CEO) asks the talent development (TD) manager to develop a culture improvement program to help people work better together and reduce conflict between teams.

Step 2

The needs analysis is now complete and indicates that many employees lack confidence in leadership. The CEO reviews the needs analysis and agrees that the marketing team ignores the production team, the research team does not trust the engineering team, but disagrees that there are problems at the senior leadership level. The CEO requests that the training begin as soon as possible.

Step 3

The CEO agrees to a meeting with the TD professional and senior leaders. None of the leadership team publicly validates that the culture problem is at their level.

What should the TD professional do?

- ☐ Coach the CEO about the CEO's role in developing a positive corporate culture.
- ☐ Recommend no further action on the program until the CEO and the leadership team recognize their contribution to the problems.
- ☐ Conduct a confidential survey of the senior leadership team to determine the corporate culture problems.
- ☐ Suggest that the CEO evaluate and reorganize the senior leadership team
- ☐ Recommend that the CEO champion a senior leadership coaching program

End ExamNext ->

Sample Question B	
Candidate Name	
Calculator	
Step 1	<p>What should the TD manager do?</p> <ul style="list-style-type: none"> ○ Conduct an employee engagement survey ○ Review HR records on turnover ○ Create a report on employee absenteeism ○ Plan to administer the same training annually ○ Conduct employee focus groups ○ Conduct one-on-one interviews with members of the leadership team ○ Perform employee observations
<p>A mid-sized manufacturing company has problems with low trust, high absenteeism, and significant turnover. The Chief Executive Office (CEO) asks the talent development (TD) manager to develop a culture improvement program to help people work better together and reduce conflict between teams.</p>	
Step 2	
<p>The needs analysis is now complete and indicates that many employees lack confidence in leadership. The CEO reviews the needs analysis and agrees that the marketing team ignores the production team, the research team does not trust the engineering team, but disagrees that there are problems at the senior leadership level. The CEO requests that the training begin as soon as possible.</p>	
Step 3	
<p>The CEO agrees to a meeting with the TD professional and senior leaders. None of the leadership team publicly validates that the culture problem is at their level.</p>	
Step 4	
<p>Nine months later, the employee training is complete and the leadership coaching is ongoing.</p>	
End Exam	Next ->

< END >

Answers for the Sample Case Management Questions

Sample Question A:

Step 1:

What should the TD professional do in the initial phase of the project prior to the selection of a subject matter expert (SME)?

- ☐ Identify the audience for the training (+1)
- ☐ Establish learning objectives (-1)
- ☐ Identify the appropriate learning approach (-1)
- ☐ Develop clear guidelines on role and responsibilities of the SME (+1)
- ☐ Select a training location (-1)
- ☐ Determine training time frame (-1)

Step 2:

What qualifications should the TD professional require in the SME?

- ☐ Relevant healthcare experience (+1)
- ☐ In-depth clinical knowledge (+1)
- ☐ Recent clinical training on the equipment (-1)
- ☐ Experience with a variety of learning approaches (-1)
- ☐ Knowledge of adult learning principles (-1)
- ☐ Prior mentoring and coaching experience (-1)
- ☐ Ability to manage difficult learners in a classroom setting (-1)

Step 3:

What should the TD professional do while working with the SME?

- ☐ Show appreciation of the SME's contribution (+1)
- ☐ Provide clear guidelines on roles and responsibilities (+1)
- ☐ Makes the SME part of the instructional design team (-1)
- ☐ Pay attention to the needs of the SME (+1)
- ☐ Encourage the SME to include personal experiences with the equipment in the training content (+1)
- ☐ Ensure high reimbursement for the SMEs time (-1)

Answers to Sample Question B:

Step 1:

What should the TD manager do?

- ☐ Start to plan who will attend culture improvement sessions. (-1)
- ☐ Ask the CEO for more detail about the source of the problems. (+1)
- ☐ Plan a needs analysis to determine the root causes of the issues. (+1)
- ☐ Identify which teams are at odds with other teams. (-1)
- ☐ Discuss with the CEO the vision for success of the culture improvement program (+1)
- ☐ Prepare a list of potential company values for the CEO to select (-1)

Step 2:

How should the TD manager react to this input?

- ☐ Start designing training for the teams identified by the CEO. (-1)
- ☐ Suggest a meeting with the senior leadership team to discuss the results of the research (+1)
- ☐ Conduct an organization-wide survey to find out the true cause of the problem. (-1)
- ☐ Provide the CEO with examples of the role of senior leadership in culture improvement (+1)
- ☐ Recommend that leadership team members participate in the training sessions. (+1)
- ☐ Inform the CEO that just training the identified teams may not resolve the cultural issues. (+1)

Step 3:

What should the TD professional do?

- ☐ Coach the CEO about the CEO's role in developing a positive corporate culture. (+1)
- ☐ Recommend no further action on the program until the CEO and the leadership team recognize their contribution to the problems. (-1)
- ☐ Conduct a confidential survey of the senior leadership team to determine the corporate culture problems. (-1)
- ☐ Suggest that the CEO evaluate and reorganize the senior leadership team (-1)
- ☐ Recommend that the CEO champion a senior leadership coaching program (+1)

Step 4:

What should the TD manager do?

- ☐ Conduct an employee engagement survey (+1)
- ☐ Review HR records on turnover (+1)
- ☐ Create a report on employee absenteeism (+1)
- ☐ Plan to administer the same training annually (-1)
- ☐ Conduct employee focus groups (+1)
- ☐ Conduct one-on-one interviews with members of the leadership team (+1)
- ☐ Perform employee observations (-1)

Appendix E: Appeal Process and Form

The ATD Certification Institute (ATD CI) makes every attempt to make fair and accurate decisions based on the information provided by the applicants and certificants. An appeal procedure is available to those who wish to contest any adverse decision affecting his or her application or certification status. Any individual who does not file a request for an appeal within the required time limit shall waive the right to appeal.

ATD CI will review appeals of adverse certification decisions from applicants for APTD or CPTD certification (“applicants”) or APTD or CPTD certified individuals (“certificants”).

Candidates are permitted to appeal an adverse certification decision on the grounds that ATD CI did not properly apply specified certification eligibility criteria or the decision was based on a factual error that affected the outcome. Adverse certification decisions include: denial of eligibility for initial certification, denial of recertification, suspension of certification or revocation of certification.

Appeals are not allowed for adverse decisions based on an individual’s receipt of a failing score on an ATD CI certification examination, absent extraordinary circumstances, as determined solely by ATD CI. Individuals cannot appeal (1) the passing score or actions taken in setting a passing score; (2) establishment of eligibility criteria; (3) individual test items; and (4) test content validity.

Privileged Information, including the nature, format, content and results of examinations administered by ATD CI are considered privileged information. Due to the importance of exam security and item banking, neither exam forms nor answer keys will be disclosed or made available for review by candidates or any other unauthorized third party. Upon receipt of the notice of an adverse decision, the applicant or certificant may submit a written notice of appeal to ATD CI no more than ten (10) calendar days following notice of the adverse decision.

In the written appeal, the applicant or certificant shall detail the nature of the appeal and the specific facts and circumstances supporting the request and all reasons why the action or decision should be changed or modified. The applicant or certificant must provide written, factual documentation to support his/her appeal. The applicant shall bear the burden of proving the adverse decision was based on erroneous factual determination. Incomplete appeal requests will not be considered.

Applicants or certificants submitting a request for review to ATD CI shall receive notification of the results within fifteen (15) calendar days of receipt of the request. Should the candidate not be satisfied with the decision rendered, the candidate may submit a written appeal to ATD CI within ten (10) days.

ATD CI will review the appeal submission and accompanying documents and make a determination. Candidates will be notified of ATD CI’s decision within forty five days (45) of receipt of the request. ATD CI will notify candidates in writing with its decision. The decision of ATD CI is final.

Appeals should be mailed to:

ATD CI - Appeals
ATD Certification Institute
1640 King Street, 5th Floor
Alexandria, VA 22314

Or emailed to certification@td.org

CPTD Program Appeal Form

Instructions: The CPTD Appeals Form must be completed and submitted per the appeal guidelines.

1. Background (Required)

Candidate Name: _____

Candidate ID Number: _____

Today's Date: _____

Type of Appeal (must choose one): ☐ Denial of eligibility to take exam

☐ Denial of recertification

☐ Suspension of certification

☐ Revocation of certification

2. Statement of Appeal (Required)

C. What is the reason for your appeal?

Check one of the reasons below (these are the only reasons that an appeal will be considered):

☐

Improperly Applied Eligibility Criteria

ATD CI did not follow its policies in the review of my eligibility for the exam or for recertification against its stated criteria

☐

Factual Error

ATD CI made a factual error in the review of my application for certification, review of my application for recertification, or administration of my exam

D. Explain the reason for your appeal.

On a separate sheet of paper provide an explanation of the reason for your appeal in 500 words or fewer. Include the following in your write-up:

1. The reasons for filing appeal
2. Explain on what grounds you believe the appeal should be granted.
3. Details and documents to support your grounds for appeal

3. Submission Instructions (Required)

Send your information to ATD CI by email to the Director at mhirt@td.org. Information must be received by the deadline set forth in the appeal guidelines (No more than ten (10) calendar days following the decision) to be accepted for review. Information received after this period will not be considered.

Appeal notifications will be made within 15 days of receipt of an appeal.



The CPTD Certification Handbook is the property of ATD CI.

Permission to reproduce its contents must be granted in writing from