A Guide to Applying for NZATD Professional Membership

Getting Started

Congratulations on your decision to apply for Professional Membership of NZATD.

This guide is designed to help you through creating a portfolio of evidence and ensuring you meet all the requirements of the application process.

Save this document and complete it online or print it out.

Before you get started, we suggest you read the Q&A Section at the end of this document.

What is the Process?

☐ **Step 1: Application Portfolio of Evidence**

☐ Create your application portfolio of evidence by completing sections one to five in this guide. Refer section '**Putting Your Application Together'**.
☐ As you create your portfolio of evidence, keep it all in one place online so it can be shared (Google drive or similar) or can be zipped and emailed.
☐ Ensure your naming conventions for documents are clear and easy to understand.
☐ Include your name on each document.

☐ **Step 2: Application**

☐ Once your portfolio of evidence is finished, complete the application form. In this, you will provide core information about yourself and your application.

☐ **Step 3: Application Submission**

☐ Submit your application by emailing the application form to nzatd@nzatd.org.nz.
☐ You will get confirmation that your application has been received. Application assessments can take up to four weeks. We will let you know the outcome by email or contact you if we have any questions.

Good luck. We can't wait to confirm you as a Professional Member.

Putting Your Application Together

Work through each section below, compete the checklists, answer the questions, and gather the required evidence to create your portfolio.

Section 1: Application Eligibility Checklist

1. Complete the following checklist. You must meet all criteria to progress to section 2.

   ☐ I am a fully paid member of NZATD.
   ☐ I know my membership number. You can find this by logging into your NZATD account or emailing nzatd@nzatd.org.nz.
   ☐ I have worked within the learning and development field for at least three of the past four years.
   ☐ I can provide an up-to-date CV of my experience within my portfolio of evidence (i.e. document or online - LinkedIn). Add this to your portfolio of evidence.
   ☐ I can provide a Continuous Professional Development (CPD) log showing at least 20 hours in the past two years of CPD. The log should include the event name, date, length, and host name.   (You can create this in a word document or excel spreadsheet and add to your portfolio of work.). Add this to your portfolio of evidence.

Section 2: Evidence Pathway

2. Read the following statement, answer the questions then go to the next step as directed.

   I have a competency-based qualification in adult learning that is accredited to at least NZQA level 4 and can provide a copy of this within my portfolio. For example:
   * *NZ Certificate in Adult tertiary teaching (Level 4 or 5)*
   * *National Certificate in Adult Education and Training (Level 4 or 5)*
   * *Equal or higher qualification in adult learning and development from a recognized tertiary institution*

   ○ No. *Go to 'Section 3: Core Competency Evidence'.*

   ○ Yes. Locate a copy of this document and add it to your evidence portfolio.

      Go to the 'Section 4: Specialist Competency Evidence'.

Section 3: Core Competency Evidence

3. There are two core competencies within the NZATD Competency Framework. You must address *both* competencies within your application (including all elements within each competency).

☐ Core Competency - Adult Learning Principles

Instructions: Explain or describe what each element listed below means to you within your field of practice. This section is theory based and will ideally link to well-practised methodology. Each element must be addressed. As a guide, allow approx. 250 words per element or 150 words overall.

- ☐ How adults learn.
- ☐ The relative merits of a range of learning theories and how these theories can be applied in practice.
- ☐ What motivates adults to learn.
- ☐ How context impacts learning design.
- ☐ Examples of how adult learning principles are applied in practice.

☐ Core Competency - Learning and Development Practice

Instructions: Explain or describe what each element listed below means to you within your field of practice and provide real world evidence or examples within in your portfolio. Each element must be addressed. As a guide, allow approx. 250 words per element or 150o words overall.

- ☐ The purpose of a needs assessment.
- ☐ The purpose of a learning needs analysis.
- ☐ Writing targeted learning objectives and how these relate to evaluation criteria.
- ☐ Learning objectives and how they are supported by specific interventions.
- ☐ Examples of learning interventions that can be applied to meet the learning objectives.

Go to Section 4: Specialist Competency Evidence.

Section 4: Specialist Competency Evidence

4. Choose at least one of the following specialist competencies. All elements within a selected competency must be addressed in your portfolio of evidence.

☐ Specialist Competency - Instructional Design

Instructions: Explain or describe what each element listed below means to you including real world evidence or examples of how this applies within your field of practice. Each element must be addressed and have supporting evidence included in your portfolio. For each element, write a short paragraph to explain how your evidence addresses that element.

☐ Instructional design, its purpose, and key elements.
☐ Conducting a needs assessment.
☐ Conducting a learning needs analysis.
☐ Designing learning activities consistent with adult learning principles.
☐ Designing learning activities which achieve learning objectives.
☐ Designing to meet accessibility standards.
☐ Building assessment into the learning design.
☐ Employing appropriate engagement techniques.
☐ Using appropriate techniques to enable others to deliver on the learning design.

☐ Specialist Competency - On-Job Training

Instructions: Explain or describe what each element listed below means to you including real world evidence or examples of how this applies within your field of practice. Each element must be addressed and have supporting evidence included in your portfolio. For each element, write a short paragraph to explain how your evidence addresses that element.
☐ Defining On-the-Job training.
☐ Describing when it is appropriate to use On-the-Job training.
☐ Creating training plans for On-the-Job training.
☐ Conducting On-the-Job training.
☐ Applying appropriate assessment methods to ascertain whether the required performance criteria have been met.
☐ Using job aids to support the learner in the working environment, as required.

☐ Specialist Competency - Facilitation

Instructions: Explain or describe what each element listed below means to you including real world evidence or examples of how this applies within your field of practice. Each element must be addressed and have supporting evidence included in your portfolio. For each element, write a short paragraph to explain how your evidence addresses that element.

- ☐ Describing the difference between presentation and learning facilitation.
- ☐ Maintaining learner engagement throughout session.
- ☐ Managing group discussions.
- ☐ Managing learner behaviour.
- ☐ Managing learning for different levels of knowledge, roles, backgrounds, and personalities.
- ☐ Planning, preparing, and managing the learning environment and resources.
- ☐ Adapting training in progress to meet learner needs.
- ☐ Creating opportunities for participation, reflection, and social learning.
- ☐ Ensuring learners receives feedback on their progress.

☐ Specialist Competency - eLearning

Instructions: Explain or describe what each element listed below means to you including real world evidence or examples of how this applies within your field of practice. Each element must be addressed and have supporting evidence included in your portfolio. For each element, write a short paragraph to explain how your evidence addresses that element.

- ☐ Designing eLearning experiences to engage learners.
- ☐ Applying accessibility standards.
- ☐ Designing and applying on-line instructional design tools in appropriate ways to achieve learning outcomes.
- ☐ Understanding the principles of effective user experience (UX).
- ☐ Applying basic visual design principles that facilitate learning.
- ☐ Incorporating appropriate feedback mechanisms to support the learning process.
- ☐ Developing engaging assessments which match the learning outcomes.

☐ **Specialist Competency - Coaching**

Instructions: Explain or describe what each element listed below means to you including real world evidence or examples of how this applies within your field of practice. Each element must be addressed and have supporting evidence included in your portfolio. For each element, write a short paragraph to explain how your evidence addresses that element.

☐ Distinguish between Coaching and Mentoring.
☐ Discuss the principles of coaching and compare different coaching models.
☐ Creating and implementing a coaching plan.
☐ Creating a positive coaching environment.
☐ Applying appropriate questioning techniques.
☐ Applying reflective listening techniques.
☐ Building rapport with the coachee.
☐ Monitoring coachee progress towards agreed goals.

☐ **Specialist Competency - Informal/Social Learning**

Instructions: Explain or describe what each element listed below means to you including real world evidence or examples of how this applies within your field of practice. Each element must be addressed and have supporting evidence included in your portfolio. For each element, write a short paragraph to explain how your evidence addresses that element.

☐ Identifying what Social Learning is and its purpose.
☐ Describing the characteristics that define effective social learning mechanisms.
☐ Identifying a range of Social Learning techniques in the workplace.
☐ Designing and implementing Social Learning techniques within an organisational context.
☐ Outlining critical success factors when implementing Social Learning.
☐ Engaging and managing participation in Social Learning groups.
☐ Evaluating and evolving Social Learning.

☐ Specialist Competency - Assessment

Instructions: Explain or describe what each element listed below means to you including real world evidence or examples of how this applies within your field of practice. Each element must be addressed and have supporting evidence included in your portfolio. For each element, write a short paragraph to explain how your evidence addresses that element.

- ☐ The purpose of assessment.
- ☐ The differences between summative assessment and formative assessments.
- ☐ Designing assessments to ascertain whether learning objectives have been met.
- ☐ Clarifying evidence requirements for assessments.
- ☐ Creating a range of assessment techniques.
- ☐ Evaluating assessment effectiveness and how to adjust if needed.
- ☐ Formulating effective assessment questions.
- ☐ Designing and developing appropriate feedback for assessment outcomes.
- ☐ Providing assessment data to identified target groups.

☐ Specialist Competency - Evaluation

Instructions: Explain or describe what each element listed below means to you including real world evidence or examples of how this applies within your field of practice. Each element must be addressed and have supporting evidence included in your portfolio. For each element, write a short paragraph to explain how your evidence addresses that element.

- ☐ Identifying at least two evaluation models.
- ☐ Defining key strategies for Evaluation.
- ☐ Identifying the different ways that Evaluation can be applied.
- ☐ Planning evaluation strategies for each of the training objectives in a lesson plan.
- ☐ Measuring reaction to the training intervention.
- ☐ Measuring learning pre- and post- training.
- ☐ Measuring on the job application of learning.
- ☐ Measuring the intervention's impact on organisational outcomes.
- ☐ Measuring the financial impact of learning.

☐ Specialist Competency - Learning Leader

Instructions: Explain or describe what each element listed below means to you including real world evidence or examples of how this applies within your field of practice. Each element must be addressed and have supporting evidence included in your portfolio. For each element, write a short paragraph to explain how your evidence addresses that element.

☐ Developing and maintaining strong working relationships with key business stakeholders.
☐ Developing and maintaining effective L&D reporting systems.
☐ Planning and overseeing the L&D project lifecycle.

☐ Specialist Competency - Learning Strategist

Instructions: Explain or describe what each element listed below means to you including real world evidence or examples of how this applies within your field of practice. Each element must be addressed and have supporting evidence included in your portfolio. For each element, write a short paragraph to explain how your evidence addresses that element.

☐ Providing input into business strategy at Executive and Board level through a learning lens.
☐ Developing business cases for strategic L&D initiatives.
☐ Champions L&D with strategic stakeholders.
☐ Managing the delivery of learning at the enterprise level.
☐ Managing Strategic Learning Initiatives to support organisational talent management.

Go to Section 5: Referee Statements.

Section 5: Referee Statements

5. You must supply four referees as part of your application:
- If employed, two employer representatives who know your work or if consulting, two clients who have commissioned your work.
  and
- Two learners.

- ☐ Download the **Referee Form**.
- ☐ Add the four completed referee forms to your portfolio of evidence.

Go to Section 6: Submit your Application.

Section 6: Submit your Application

Congratulations. You are ready to submit your application. The application process includes completing an application form and submitting it along with your portfolio of evidence.

- ☐ 1. Download the **Application Form** and complete it. In this, you will provide core information about yourself and your application.

- ☐ 2. Submit your application by emailing the application form to nzatd@nzatd.org.nz.

You will get confirmation email that your application has been received. Application assessments can take up to four weeks. We will let you know the outcome by email or contact you if we have any questions.

Commonly Asked Questions

Q: What is a Portfolio of Evidence?

A: In this application, you will create a Portfolio of Evidence. This is a range of documents or examples of either your thinking or your work. It is how you demonstrate application within your field of practice. Evidence examples can vary such as (but not limited to):

- Lessons plans
- Personal reflections/diary
- Peer reviews
- Planning documents
- Scope documents
- Needs analysis documents
- Evaluations
- Photos
- Videos
- Interviews
- Strategy documents
- Subject matter expert requirements and reflections
- Email correspondence
- Self-evaluation
- eLearning modules
- On-the-job resources/cheat sheets
- Facilitator guides
- Participant guides
- On-job resources
- Evaluation forms
- Feedback forms
- Power-point presentations.

Q: What is the average time taken to prepare an application?

A: It can vary depending on the application process you take and the amount of evidence you provide. As an approximate guideline, an application may take anything from half to day to a few days.

Q: Do I need to have completed a formal qualification such as NZ Certificate in Adult Tertiary Teaching (Level 4 or 5), a National Certificate in Adult Education and Training (Level 4 or 5) or equal or higher qualification in adult learning and development to apply for professional membership?

A: No, you don't. There are two evidence pathways to following – one for people with a qualification and one without. In other words, you can still apply for membership without an existing qualification.

Q: What are the different pathways for someone who has a qualification and someone who does not?

A: No qualification

1. Provide evidence for the core competency Adult Learning Principles.
2. Provide evidence for the core competency Learning Development Practice.
3. Choose at least one specialist area and provide evidence for this competency
   - Instructional Design
   - On-Job Training
   - Facilitation
   - eLearning
   - Coaching
   - Informal/Social Learning
   - Assessment
   - Evaluation
   - Learning Leader
   - Learning Strategist

B: Existing qualification

1. Provide a copy of your qualification. You do not need to provide evidence for the core competencies.
2. Choose at least one specialist area and provide evidence for this competency
   - Instructional Design
   - On-Job Training
   - Facilitation
   - eLearning
   - Coaching
   - Informal/Social Learning
   - Assessment
   - Evaluation
   - Learning Leader
   - Learning Strategist

Q: How long does it take for an application to be reviewed?

A: The NZATD Board of Studies Panel will try to process professional membership applications within four weeks. It will take longer if some information is missing.

Q: Do I need to address every Competency element within a chosen competency?

A: Yes, every element for a competency must be addressed. E.g. if you choose Instructional Design, all 9 elements must be addressed:

- Instructional Design:

  - ☐ Instructional design, its purpose and key elements.
  - ☐ Conducting a needs assessment.
  - ☐ Conducting a learning needs analysis.
  - ☐ Designing learning activities consistent with adult learning principles.
  - ☐ Designing learning activities which achieve learning objectives.
  - ☐ Designing to meet accessibility standards.
  - ☐ Building assessment into the learning design.
  - ☐ Employing appropriate engagement techniques.
  - ☐ Using appropriate techniques to enable others to deliver on the learning design.

Q: How many evidence examples do I need to include?

A: There is no set amount. Just as long as you demonstrate all elements within a competency. You might be able to demonstrate this with one or two examples or you might need more.

Q: What happens if I don't provide enough evidence to meet the requirements for Professional Membership?

A: We want you to succeed. If you don't provide enough evidence in your initial submission, we will work with you to help you achieve the required standard. This could include (but is not limited to) submitting extra information or an interview with the panel.

If it is felt that you are not yet ready to submit your application, the NZATD Board will explain what else you need to do and if required allocate a mentor to work with you to guide you on what further learning and/or experience is required.

Q: Will my referees be contacted?

A: Depending on the level of information provided, the NZATD Board reserve the right to contact referees.

Q: What NZQA unit standards are linked to the competencies?

Competency	Related NZQA Standard
Adult Learning Principles	7102, 7115, 29690
Learning and Development Practice	7093, 7103, 7104, 7105, 7110, 29692, 29693
Instructional Design	7093, 7094, 20470, 29689
Assessment	4098, 4099, 4100, 4101, 11280, 11281, 18203, 26171, 30421, 30422, 30423, 30424, 30425
On-the-job Training	7091, 7096, 7108, 7115, 19444, 11551, 21982, 29691
Coaching	7095, 7106, 7114
Evaluation	7098, 7099, 7100, 7113, 7116, 11551, 11552, 20469, 29693, 30424, 30426
E-Learning	10472, 10473, 10474, 10475, 10476, 25779, 25780, 25781
Facilitation	7091, 7096, 7097, 7107, 7115, 19444, 29691, 29692
Social Learning	-
Learning Leader	7092, 7100, 7101, 7109, 7112, 10474, 11280, 25780, 26172, 30426, 30427
Learning Strategist	7099, 7101, 7109, 7112, 26171, 30424

Q: Who will assess my application?

A: Your application will be assessed by members of the NZATD Board of Studies. The Board comprises five Fellow Members with at least 15 years of Learning and Development experience. A panel will comprise of three of the five members.

Q: Is the information I provided in my application confidential?

A: All information supplied is treated as highly confidential and will not be shared without the expressed permission of an applicant. All assessors have signed non-disclosure agreements (NDAs). Copies can be provided on request. Please email nzatd@nzatd.org.nz. Please let us know if there is a requirement for a specific business NDA to be signed to submit your application

Q: Who should I contact if I have further questions?

A: Please email nzatd@nzatd.org.nz.