



CoSN's

**Certified Education
Technology Leader (CETL)**

Certification Handbook



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Introduction

CoSN's Certified Education Technology Leader (CETL) certification program and its body of knowledge were created by and for education technology leaders. This ensures that the program is a reflection of today's CTO profession. The program is governed by the Certification Governance Committee (CGC), which is comprised of education technology leaders with a combined total of more than 160 years of experience in the field. Following certification industry best practices, there is a distinct firewall between the CGC and the CoSN staff and board members. This ensures the integrity of the exam. Those creating the certification program do not have access to the CoSN decision-making and budget oversight. In turn, those at CoSN responsible for creating preparatory materials for the exam do not have access to the exam's content.

CETL Certification Purpose

Those who hold the CoSN CETL certification have demonstrated their mastery of the knowledge and skills needed to be a successful school district technology leader. Once certified, CETLs agree to recertify their designation every three years, thus assuring their peers, their employers, and the students they serve that they are dedicated to staying current in the education technology field and will bring that knowledge to their school districts.

Why Was the CETL Certification Created?

CoSN is an independent association representing school district technology leaders. These leaders go by many titles including Chief Technology Officer (CTO), Chief Information Officer (CIO), Director of Technology, and more. No matter their title, our members are committed to helping lead American school districts into the 21st century. We know that when appropriately implemented with strong leadership and a clear vision as well as sufficient professional development, that technology can be profoundly powerful and transformative. District technology leaders are the professionals responsible for overseeing and implementing the technology that is increasingly complex, greater in number and scope, and ever more integrated into the daily instructional and administrative routines of today's school districts. CoSN developed the CETL certification to clearly identify the district technology leaders who have mastered the skills needed to bring the technology our students need *today* to compete in the global marketplace of their *future*. CoSN believes that our certification program will

- Enable strategic and systemic use of technology to improve learning in K-12 schools.
- Recognize the evolving role of the CTO and address the gap between the dual aspects of a CTO's job – both educational and technical – thereby serving as a self-assessment.
- Create a clearly identifiable role for the CTO within a district's leadership structure and to elevate the profession and encourage districts to ensure that the CTO is participating in conversations at the Cabinet level.
- Help CTOs and aspiring CTOs identify and find necessary professional development opportunities that will help them acquire or strengthen skills and competencies required for success as 21st century education technology leaders.

What Will the CETL Certification Exam Test?

What are the competencies of a CTO? To answer this question, CoSN assembled a task force of education technology leaders to develop the body of knowledge needed by the professionals who oversee the implementation of technology in our nation's K-12 school districts. This body of knowledge, called the [Framework of Essential Skills of the K-12 CTO](#), identifies the 10 critical skill areas needed to be a successful Chief Technology Officer. These skill areas are:

- Leadership & Vision
- Strategic Planning
- Ethics & Policies
- Instructional Focus & Professional Development
- Team Building & Staffing
- Stakeholder Focus
- Information Technology Management
- Communication Systems Management
- Business Management
- Data Management

Under each of these skill areas, the task force identified the specific responsibilities the CTO is accountable for in their daily jobs and the knowledge needed to carry out these tasks. This body of knowledge has been used to create the first-ever certification exam specifically designed to test CTOs and aspiring CTOs on the skills necessary to bring 21st century technology to our K-12 school districts (see Appendix A for the complete Framework).

What is Certification?

Achieving certification is more than passing an exam. Holding a certification indicates that you have mastered the body of knowledge needed to perform your job at the highest level. Recertification requirements ensure that you stay current with the changes taking place in your field.

What are the Differences between Certification and Certificate Programs?

With certification programs

- You must pass an exam
- You must recertify, usually through professional development (PD) activities; thus the program is considered a career-long process
- The exam and the program are more robust and stringent
- The eligibility requirements generally include a combination of education and experience

With certificate programs

- There are generally no eligibility requirements
- Participants go to a one-time training session
- There is usually no assessment of “lessons learned”
- The Certificate of Completion is generally just based on attendance rather than lessons learned
- There is no follow-up PD required so there is no guarantee that you are continuing to update your knowledge of the topic

Is Certification Right For Me?

The CoSN certification program is specifically designed for CTOs and those aspiring to be CTOs. Holding the CETL designation will demonstrate to your colleagues, superintendents, and subordinates that you

- Have mastered the body of knowledge needed to bring 21st century technology to K-12 school districts
- Are dedicated to remaining current in the education technology field
- Will work with your school district to ensure that technology is considered and implemented in all aspects of your school district's strategic planning

If you aspire to achieve these goals, the CETL certification is right for you.

Eligibility Requirements

What Are the Exam's Eligibility Requirements?

To sit for the CETL certification exam you must have a minimum of a Bachelor's degree plus four years of education technology experience. "Education technology experience" is defined as

- Demonstrable experience in the three overarching skills areas of the [Framework of Essential Skills of the K-12 CTO](#), which are:
 - Leadership & Vision
 - Understanding the Educational Environment
 - Managing Technology & Support Services

In addition, you will be required to sign a *Code of Conduct and Terms of Confidentiality* before your application is accepted for processing (see Appendix B).

What If I Don't Meet the Eligibility Requirements?

If you don't meet the minimum education requirements, you must have at least seven years of demonstrable experience in education technology. To be deemed eligible using these criteria, you must appeal to the Certification Governance Committee (CGC). This appeal must be writing and must include an explanation of your experience plus a signed recommendation from your supervisor attesting to your experience. Send this appeal to: Certification Governance Committee, Consortium for School Networking, 1025 Vermont Avenue, NW, Suite 1010, Washington, DC 20005. A pdf of the signed appeal may also be emailed to certification@cosn.org.

Exam Structure

How is the Exam Structured?

There are two parts to the CETL certification exam. Applicants must pass both parts of the exam to be certified.

- I. Part I is an internet-based, multiple choice exam consisting of 115 items. Of the 115 items, 100 will be scored and 15 will be pretest questions. The exams will be administered via Internet-Based Testing at proctored sites throughout the year. You will be given two hours to complete Part I and your results will be provided immediately. Those who pass Part I will be emailed instructions for taking Part II.

- Part II of the exam is also internet based; however, this part of the exam is not proctored and may be completed using your own computer. Those passing Part I will be sent email instructions on how to complete this essay-based portion of the exam. You will have seven days to submit your essays (submission instructions and the deadline will be included with the email). Your essays will be graded by a panel of CTO subject matter experts specifically trained by testing specialists using a pre-determined rubric.

The items – all tied to the *Framework of Essential Skills of the K-12 CTO* – will be distributed proportionately throughout the exam following these percentages:

Skill Area	Percentage
LEADERSHIP & VISION	40
Leadership & Vision	15
Strategic Planning	15
Ethics & Policies	10
UNDERSTANDING THE EDUCATIONAL ENVIRONMENT	30
Instructional Focus & Professional Development	12
Team Building & Staffing	9
Stakeholder Focus	9
MANAGING TECHNOLOGY & SUPPORT RESOURCES	30
Information Technology	9
Communication Systems	7
Business Management	7
Data Management	7

Why are Pretest Items on the Exam?

Pretest items are included on the CETL exam to measure their difficulty and effectiveness before they are officially added to the exam’s item bank. You will not know which of the 115 items on the exam is a pretest item and your answers to these questions will not be included in your final score.

Applying for the Exam

How Do I Apply to Take the Exam?

The exams will be administered at select testing sites. These administrations will be posted on www.cosn.org/certification in the “[Exam Dates](#)” section.

The following steps outline the process you will follow to apply for the CETL exam.

Step 1: Create a profile in the CoSN Certification database.

Step 2: Fill out and submit an online exam application and complete the payment process.

As part of the CETL eligibility requirements, you will be required to agree to abide by the *CETL Certificant Code Conduct and Terms of Confidentiality* (see Appendix B).

Step 3: Applications will be reviewed for completeness and adherence to eligibility requirements.

Step 4: You will be notified upon approval of your application.

Step 5: You will receive an **Authorization to Test** letter that will include testing site location and exam times.

Step 6: Prepare for the exam. We suggest you first take the self-assessment, which can be found in Appendix C or at www.cosn.org/certification in the “Exam Preparation Materials” section. The self-assessment will identify the areas in which to concentrate your studies. This section of the web offers other preparatory materials. We also suggest you visit the CoSN Knowledge Center (www.cosn.org/knowledge) to review the library of resources available to school district technology leaders. All of these resources are tied to at least two of the *Framework’s* ten skill areas.

Step 7: Take the exam.

What is the Application Audit Process?

CoSN audits 5% of all exam applications. If you are chosen for an audit, you will be asked to submit documentation of your work and education experience.

How Do I Document My Work Experience?

If you are audited, you will be asked to submit a job description that outlines the work experience you submitted on your application and a signed letter from your superior attesting to the accuracy of that work experience.

How Do I Document My Education Experience?

If you are audited, you will be asked to submit an official transcript from your college or university showing your highest degree achieved.

How Do I Fill Out the Application?

All applicants must follow these steps:

- **Existing CoSN members** will login to the MyCoSN portal on the website using their user name and password. **Nonmembers** will be required to create an online CoSN profile.
- After logged in, applicants will navigate to www.cosn.org/certification and select “Apply for Exam” and follow the instructions at the top of the page. You will also be required to complete the payment process at this time.
- Your application will be reviewed for completeness and adherence to the CETL eligibility requirements. Once approved, you will receive an Authorization to Test letter with further instructions.

How Do I Request a Special Accommodation at the Test Site?

If you have a documented visual, physical, hearing, or learning disability that would prevent you from taking the exam under standard conditions, you may request special testing accommodations by checking the “Special Accommodations Request” option on the application. You will be asked to complete the Special Accommodations Request form, which requires written documentation of the disability from the candidate’s doctor or another qualified medical professional. The completed Special Accommodations Request form may be sent to CoSN via mail or via a pdf attachment in an email. There is no extra fee for making these arrangements. In considering special accommodation requests, CoSN is guided by a sense of fairness. Special accommodations are granted to give a candidate the

opportunity to be tested in an equivalent manner as other candidates, but not to provide an advantage over other candidates. If CoSN is unable to fulfill your special accommodation request, your entire application fees will be refunded.

When Are the Exams Offered?

The CETL exam will be administered each year at CoSN's Annual Conference. Additional administrations will be scheduled at CoSN-sponsored events throughout the year. As additional administrations are scheduled, the dates will be posted on www.cosn.org/certification. Once there, click on the "[Exam Dates](#)" link on the left-hand navigation listings.

What Are the Application Deadlines?

Applications must be received two weeks before the exam's testing date.

How Will I Know If I'm Approved to Take the Exam?

If you are approved to take the CETL exam, you will be sent an Authorization to Test letter with instructions about appearing for your exam.

How Do I Reschedule or Cancel an Exam?

- **Rescheduling the Exam** – If you are unable to take the exam during the administration for which you were scheduled, you may reschedule your exam at no cost. Note, however, that the CETL exam will be administered only at specific events and locations throughout the year.
- **Cancelling the Exam**
 - If you wish to cancel your exam registration, you must do so **at least 24 hours** before the scheduled date of your exam. To cancel an exam, you must notify CoSN in writing (a pdf attachment to an email is acceptable). Send your request to certification@cosn.org.
 - If you have scheduled an exam but do not appear at the testing site on the day the test is given and you have not notified CoSN at least 24 hours before the start of the exam, you will be considered a "no show" and **all fees will be forfeited**.

Exam Costs

How Much Does the Exam Cost?

- **CoSN Member:**
\$400 (\$150 nonrefundable)
Retake fee: \$200 per exam part, per retake
- **Non-CoSN Member:**
\$700 (\$260 nonrefundable)
Retake fee: \$350 per exam part, per retake

What are the Refund Policies?

- If you notify CoSN at least 24 hours before the exam is administered to cancel your exam, all but the nonrefundable fee will be returned.
- If you do not appear at the testing site on the day the test is scheduled to be administered and you have not notified CoSN at least 24 hours before the start of the exam, all fees will be forfeited.

Member Discounts

In order to receive the CoSN member discount for the CETL exam, candidates must have a Corporate, Institutional, or Individual membership with CoSN. All affiliate members of a CoSN Corporate or Institutional member will receive the member discount (see “Affiliate Membership” below for more information). An outline of CoSN membership categories appears below.

Corporate Membership

For corporate participation through membership and sponsorship opportunities.

Institutional Membership

For school districts, educational service agencies, charter or private schools, state departments of education, colleges and universities, or other associations.

Affiliate Membership

An individual officially associated with a Corporate or Institutional Membership account (e.g., district staff, corporate employees, organizational members).

Affiliate members must be registered with CoSN to be eligible for member rates. The CoSN key contact person within an institutional or corporate membership is responsible for approving and registering Affiliate Member accounts on the CoSN site. Once the account is set up, the affiliate member will receive a User ID, which will be used when applying to obtain the member discount. If you are an employee or associate of a CoSN Corporate or Institutional Membership and do not have a CoSN membership number, contact the CoSN key contact at your school or organization to ask to be added as an affiliate member.

Individual Membership

For individuals with an interest in educational technology issues, such as recent retirees, graduate students, or ed tech consultants.

Non-members

If you are not a CoSN member and do not wish to become one, you must create an online user account in order to register for the CETL exam. Please note that the full exam price will be charged to those with non-member CoSN online user profiles; creating an unpaid online user account does not constitute membership.

What if I Have An Emergency?

CoSN understands that personal or professional emergencies sometimes occur. If such an occasion occurs and a candidate is unable to take the exam and unable to cancel the exam within 24 hours of its administration, you must contact CoSN in writing with the reason for the emergency (a pdf attachment to an email is acceptable). Your request will be reviewed by the CGC. If the CGC rules that the emergency was unavoidable, all but the nonrefundable fee will be returned. Note: Not being prepared for the exam will not be considered a “personal emergency.”

Preparing for the Exam

How Do I Study for the Exam?

The CETL exam is based on the *Framework of Essential Skills of the K-12 CTO*. It will measure your knowledge in the skills identified in the *Framework*. Because people come to the CTO field in a variety of ways (e.g., from a technology background, from an educational background), there is no best way to

study for the exam. In addition, there are no preparatory materials that will “teach to the test.” Therefore, assessing your personal experiences in and knowledge of the education technology field should be your first step.

CoSN suggests you first review the *Framework* and then take our Self-Assessment (see Appendix C or visit <http://www.cosn.org/certification>), which will help you identify the skill areas in which to concentrate your studies. Once your knowledge levels have been assessed, there are a number of ways to improve your skills in those areas:

- Take our [practice exam](#), which is a sampling of the types of questions that will be on the exam.
- Visit the [CoSN Knowledge Center](#) to review our library of resources available to education technology leaders. All of these resources are tied to at least two of the *Framework's* 10 skill areas.
- Purchase the recently released [Become a Highly Capable School System Technology Leader: CoSN's Certified Education Technology Leader \(CETL\) Certification Program Preparation Materials](#). This 11-module digital publication takes an in-depth look at each of the 10 skill areas identified in the *Framework*. Each module includes "To Do" exercises, "Reflection Questions" to help you gauge your understanding of the specific skill area, and an "Extending Your Study" section with suggestions for additional information on the module's topic.
- Form a study group with members of your local CoSN Chapter or your colleagues from your district.
- Identify a mentor in the CTO field willing to guide you with your studies.

Exams Scores

How is Part I of the CETL Exam Scored?

A modified Angoff passing score study is performed to set the score for Part I. This is a common testing and measurement technique where a panel of subject matter experts reviews the examination. Each expert is asked to review each question in the examination, and assess the difficulty of that question. More specifically, they are asked to estimate the likelihood that a candidate with minimum adequate knowledge would answer the question correctly. The sum of these probabilities, averaged across the panel of experts, gives a preliminary estimate of the pass mark.

The estimated pass mark resulting from the modified Angoff passing score study is compared to and balanced with the actual performance statistics on the examination in finalizing the pass mark. The effects of any particularly difficult questions are also factored into the determination of the final pass mark. A candidate who meets the minimum level of competency, as established through a cut score study, will pass Part I. In other words, if a candidate responds correctly to the number of questions identified during the cut score study (or more), then the candidate will pass Part I.

How is Part II of the CETL Exam Scored?

For Part II of the CETL exam, the passing score is decided by the Scoring Committee, which is comprised of a panel of subject matter experts who review the candidate's responses and then decide whether the response is acceptable or not acceptable, using a definition of minimal competency as the dividing line. Setting the cut score for Part II of the exam was a multi-phased process where each essay was evaluated by two independent, trained graders using an established rubric. The entire process was facilitated by a psychometrician to ensure that it met exam industry standards. A candidate who meets the minimum level of competency, as established through the cut score study, passes Part II.

After the Exam

I Passed. Now What?

Showcase your achievement proudly! Add the CETL designation to your email signature and business cards. Notify your colleagues and bosses of your certification. Once you pass the CETL certification exam you may use your designation as long as your certification remains current.

CoSN has created the following tools you can use to announce your certification:

- [Sample Press Release](#) – Make sure your colleagues and community know of your achievement. We have created a sample press release for you to use to announce your achievement to your local newspaper or school newsletter.
- Notify your superintendent and school board – If you would like us to send a verification of your new CETL certification status, please email the request to certification@cosn.org. Please include the name, address, and email information of the person to whom you'd like the verification sent.

What If I Don't Pass?

Candidates are permitted to retake each exam Part once within a two-year period. Part I of the exam must be passed before you are eligible to take Part II. If you fail Part I, the retake fee will apply if Part I is retaken. When Part I is passed, you may take Part II of the exam. If you fail Part II, the retake fee will apply when Part II is retaken. Those who fail any retake exam must wait two years before they are eligible to re-apply for the exam (Parts I and II at full price).

Retake fees

If you do not pass either Part I or Part II of the exam, you may re-apply to take the exam at a reduced rate; however, you are only permitted to retake the exam once every two years.

CoSN Member:

- Retake fee: \$200 per exam part, per retake

Non-CoSN Member:

- Retake fee: \$350 per exam part, per retake

Recertification Requirements

How Do I Remain Certified?

Your CETL certification will expire three years after the date of issue. To remain certified, you are required to stay current in the CTO field by completing 60 hours of continuing education activities (CEAs). **All activities must be tied to one or more of the 10 skill areas identified in the Framework.** In addition, your recertification activities must take place within your three-year certification cycle.

CEAs are calculated on a 1:1 basis (for example: 1 hour at a conference session = 1 CEA hour) unless otherwise noted below. Credit is only awarded for education-related activities (registration, exhibit hall, and meal time hours, for instance, should not be included in your calculations). CEAs may be completed in any of the following ways:

- Continuing Education
Includes activities such as conferences, seminars, college courses, on-the-job professional development classes, or other educational activities.

Maximum of 60 hours

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- **E-Learning/Online Courses**
 - Courses in which you are given an assessment at the end of the course, and/or include college credit.
Maximum of 60 hours
 - Courses with no assessment or college credit (e.g., webcasts, videoconferences, podcasts, etc.).
Maximum of 20 hours
- **Industry-Related Certification**
Four (4) hours will be awarded per industry-related certification (e.g., Comp TIA, CISSP, etc.).
Maximum of 12 hours
- **Teaching/Instruction**
Instructional hours are awarded on a 1:1 basis (note: credit is only awarded for the first time the instruction is given). In addition, 3 hours will be awarded per activity for prep time.
Maximum of 30 hours
- **Professional Membership**
Membership in an organization related to the education technology field (e.g., CoSN, ISTE, etc.)
2 hours per year, per membership.
- **Published Works**
Articles, blogs, and other related works that *impart knowledge related to the 10 skill areas*.
4 hours per article. Maximum of 12 hours
- **Volunteer/Leadership Work**
Work performed outside your job related to one of the 10 skill areas (e.g., CoSN Committee, mentoring, focus group participation). One hour of work = one hour of credit.
Maximum of 20 hours

How Much does it Cost to Recertify My Designation?

The cost to recertify is \$150 (\$300 for nonmembers). Your recertification application must be accompanied by this fee.

How Do I Submit My Recertification Activities?

Keep track of your CEAs as you accumulate them (see Appendix D for a sample form). Once you have accumulated the required 60 hours of CEAs, you may submit your CEAs for CoSN's review. Please do not submit your activities until you've accumulated the required 60 hours. If you have questions about what activities are eligible for recertification credit, please email certification@cosn.org. Please put "Recertification" in the subject line.

How Do I Provide Proof That I Have Completed an Activity?

You will only be asked to provide documentation of activities if you are audited; therefore, please keep a file of receipts and other proof of completion for at least six months after you have submitted your application. For conference attendance, we suggest you keep a check list of the educational courses you attended.

Can I Retake the Exam to Recertify?

Yes. Instead of accumulating 60 hours of CEAs, you may retake the exam before your three-year certification cycle ends. You must pay all applicable application fees. And, of course, you must pass the exam to remain certified. To recertify by exam, the exam must be taken in the final year of your certification cycle.

What if I Miss the Recertification Deadline?

If you do not submit your recertification application or retake the exam by the end of your three-year certification cycle, you will lose your certification and must begin the process again.

Will CoSN Send Me Alerts When My Deadline is Approaching?

CoSN will send email notifications when your deadline is approaching; therefore, please make sure your email is up-to-date in your online profile. Ultimately, however, it is your responsibility to keep track of your certification cycle end dates.

Appeals Process

May I Appeal a Decision?

An appeal may be made by a CETL candidate or certificant to the CGC's Appeals Subcommittee regarding review of an adverse certification program action, decision, or determination.

The appeal

- Must be in writing, signed by the appellant, and sent to the CGC (a pdf attachment to an email is acceptable).
- Must include specific reasons for the appeal and evidence or other pertinent information that refutes the original decision.
- Must be sent within 30 days of receipt of notification of a certification adverse decision.

The Appeals Subcommittee will review the appeal as soon as practicable and make recommendations to the CGC. The Appeals Subcommittee does not have the authority to confer or reinstate the CETL certification. All determinations regarding an appeal must be made by a two-thirds vote of the CGC.

The final decision on the appeal will be provided to the appellant as soon as practicable. The CGC's determination will be final.

Send your appeal to:

Certification Governance Committee
CoSN
1025 Vermont Ave., Suite 1010
Washington, DC 20005
Or email your appeal to: certification@cosn.org

We will notify you in writing with the final decision.

Statement of Non-Discrimination

CoSN endorses the principles of equal opportunity. Eligibility criteria for examination and certification as a CETL are applied equally to all individuals regardless of age, race, religion, gender, national origin, veteran status, or disability.

Appendix A

CoSN's Framework of Essential Skills of the K-12 CTO

CoSN's Framework of Essential Skills of the K-12 CTO



The Framework of Essential Skills of the K-12 CTO is comprised of three **primary professional categories** in the education technology field. Each of these categories includes **10 essential skill areas**, outlining the **responsibilities and knowledge** needed to be a viable **educational technology leader**. Each of these skills and the related knowledge needed to demonstrate them are included in CoSN's Certified Education Technology Leader (CETL) certification exam.

- | | |
|---|--------------------------------------|
| 1. Leadership & Vision | 6. Stakeholder Focus |
| 2. Strategic Planning | 7. Information Technology Management |
| 3. Ethics & Policies | 8. Communication Systems Management |
| 4. Instructional Focus & Professional Development | 9. Business Management |
| 5. Team Building & Staffing | 10. Data Management |

The **Core Values & Skills** of the *Framework* extend through all 10 skill areas and are practiced by effective CTOs. They represent the critical personal skills and behaviors necessary for accomplishing all of the other competencies identified in the *Framework*. These core values and skills include being an effective **Communicator** and **Innovator**, **Exhibiting Courage**, and being **Flexible & Adaptable** and **Results-Oriented**.

Primary Professional Categories

I: Leadership & Vision

II: Understand Education Environment

III: Managing Technology & Support Resources

I. Leadership & Vision (40%)

I. Leadership and Vision (15%)

Work closely with the executive team and stakeholders to develop a shared vision with long-term, big-picture perspectives on district goals to plan for meaningful and effective uses of technology; provide leadership when creating a vision of how technology will help meet district goals.

IA – Actively participate with members of the Superintendent's cabinet (e.g., district senior management) to create a vision for how technology will support the district's strategic and operational goals

Knowledge of: strategic planning techniques; effective collaboration skills; existing and emerging technologies; interpersonal communication skills (e.g., asking questions to solicit best ideas from the group and consensus-building strategies)

IB – Establish and lead advisory committees that inform and support meaningful and effective uses of technology in support of the district's strategic goals

Knowledge of: definitions of roles, responsibilities, and expectations; time management skills; organizational skills; constructive conflict management

IC – Facilitate the process of priority setting and decision making for meaningful and effective uses of technology in support of the district's strategic goals

Knowledge of: use of decision-making rules; time-management skills; organizational skills; big picture awareness; systemic planning skills

ID – Lead infusion of innovative technologies into all aspects of education

Knowledge of: scope of promising technologies; forecast of return on investment; benchmark measurements for key innovations

IE – Leverage appropriate relationships (opportunities) between emerging technology resources and the education process

Knowledge of: focus on effective, challenging, and engaging learning for all; value of new technologies

IF – Develop and maintain a systemic understanding of the core business and culture of the school organization

Knowledge of: listening skills; relationship-building skills; organizational structure (formal and informal); stakeholders (community and employee demographics); school district history

IG – Employ technology within the interdependent environment of assessment, curriculum, and instruction

Knowledge of: sources and nature of educational content and processes; technologies that can be used for the greatest impact on teaching and learning; assessment best practices (e.g., how to assess key instructional activities, learning diagnostics, assessing learning styles, educational terminology, and accommodations for all learning styles)

IH – Facilitate change in an organization and deal with ambiguity effectively

Knowledge of: techniques to manage the change process; cultural context of change; role of professional development in change process; techniques for communicating need for change, direction, and destination (successful accomplishment of vision); facilitating change

II – Promote effective use of communication and marketing resources

Knowledge of: building support for change through a variety of mechanisms (leading by example, and personal and mass communication); relationship building; marketing collateral (online, hardcopy); public speaking; use of data to help people to draw conclusions; storytelling (e.g., tangible examples of what effective change looks like)

IJ – Collaborate with business and instructional units to develop ownership of their work processes

Knowledge of: effective power-sharing techniques; building supportive relationships; importance of focus on shared goals; value of using processes (methods) that recognize contributions of individual stakeholders; sense of common mission; camaraderie to ensure success

IK – Communicate the effectiveness of technology in professional activities (e.g., model, inform, and demonstrate how technology assists with productivity)

Knowledge of: role of technology to enhance efficiency and effectiveness of current practices; cost reduction opportunities (e.g., online attendance,

accounting, CNP, operations, and professional development records for certification documentation)

2. Strategic Planning (15%)

Have a high-level view across the school system and work with instructional and technical teams to identify steps needed to transform the technology vision into a long-range plan, complete with specific goals, objectives, and action plans.

2A – Work with key system leaders, people networks and/or learning communities (e.g., math teachers) and departments to identify steps needed to meet strategic goals

Knowledge of: identifying system leaders; best practice of strategic planning; technology framework; alignment of technology to the strategic goals

2B – Work with key system leaders, people networks (e.g., math teachers), and departments to identify budget and funding mechanisms needed to meet strategic goals

Knowledge of: sources of funds, including federal, state, local, and public and private grants; donations; budget development (chart of accounts)

2C – Align technology team activities with the school district goals

Knowledge of: aligning resources such as people, capital, and expenses; goals and performance evaluations aligned to district goals; relative priorities of competing demands

2D – Promote and lead the implementation of industry best practice methodologies, tools, and programs (e.g., TCO, ITIL, SDLC, Baldrige) in support of technology

Knowledge of: TCO concepts; modeling the implementation of methodologies, tools, and programs in support of district goals; use of financial information, financial, and non-financial metrics; conducting a needs assessment

2E – Articulate and fully leverage the value of investment (VOI) in technology to ensure effective delivery of services aligned to the district vision and goals

Knowledge of: communicating the alignment of research to support best practices to illustrate VOI; application of project management; prioritization concepts to implementation

2F – Provide leadership in strategic alignment of technology with all district systems (e.g., instruction, assessment, finance, facilities, transportation, security, food service)

Knowledge of: how to find evidence and examples of successful solutions for each district system and department; methods of identifying “all district systems;” methods of communicating results (e.g., case study); district system components

2G – Integrate technology with curriculum and instruction to provide an appropriate teaching and learning environment

Knowledge of: evidence and examples of successful solutions for each district system and department; measurements for how technology supports each system or department; integration and relationships between various departments

2H – Develop sound practices that guide, articulate, and inform the organization of risk management strategies and risk mitigation in support of business and instructional initiatives

Knowledge of: developing a security plan; periodic and ongoing tests for backup and recovery; redundancy systems; means of assessing risk and potential impact

2I – Monitor, evaluate, and report on district’s educational technology plan

Knowledge of: metrics; data on goals, strategies, and budget to support the technology plan; reports that are meaningful to stakeholders (applicable to education)

2J – Advocate for district-wide disaster recovery and business continuity planning

Knowledge of: best practice examples of successes and failures; a phased-in plan to include multiple solutions; involving stakeholders in refining plan; implementing drills

2K – Plan and implement the district’s goals and objectives by leading innovation and strategy

Knowledge of: conveying complex technology concepts in familiar terms to non-technology staff; translating data and statistics into easily understood graphical representations of goals and objectives; engineering solutions based on existing goals and objectives; developing solutions for creating a process of continuous improvement

3. Ethics and Policies (10%)

Manage the creation, implementation, and enforcement of policies and educational programs relating to the social, legal, and ethical issues related to technology use throughout the district and modeling responsible decision-making.

3A – Model and ensure adherence to state and federal laws

Knowledge of: applicable state and federal laws; monitoring for compliance; collaborating with other impacted departments and areas of district; system goals and practices; process for demonstrating personal and system compliance

3B – Demonstrate high standards of integrity and professional conduct with consideration for fairness and honesty

Knowledge of: policies and procedures at all levels (e.g., district, federal, E-Rate); maintaining records

3C – Communicate to stakeholders the appropriate ethical and professional behavior for technology use in the district

Knowledge of: examples of best practices; expert examples in the field and/or experts who can share their examples

3D – Model and ensure awareness about pertinent laws and legal issues related to implementation and use of technology in a district (e.g., copyright, privacy, and compliance)

Knowledge of: resources for maintaining current information about laws and legal issues and how particular district departments, policies, and practices are impacted; multiple methods of communicating information

3E – Maintain safety of students and staff

Knowledge of: potential vulnerabilities and issues; best preventive practices; cyber-security and physical security; policies impacting vulnerabilities

3F – Demonstrate commitment to responsible environmental protection and energy-saving practices

Knowledge of: how to align technology planning and implementation to support goals for environmental protection and energy-saving practices; best practices for appropriate equipment disposal

3G – Collaborate with others in the policy development process by ensuring that policies support a high-performing learning environment

Knowledge of: existing policies with impact on high-performing learning environments, policy development guidelines and process; policy writing and development; communicating and collaborating with individuals; the definition of a high-performing learning environment

3H – Facilitate equitable access to technology resources for all stakeholders

Knowledge of: definition of equitable access; structuring technology expenditure formulas to accommodate equity; identifying stakeholders in the equitable process, as determined by district practice and/or policies; access needs of diverse students and staff (e.g., UDL information, IDEA, ESL, special needs)

II. Understanding the Educational Environment (30%)

4. Instructional Focus and Professional Development (12%)

Budget, plan, and coordinate ongoing, purposeful professional development for all staff using technologies; ensure a sufficient budget through the implementation and assessment process of emerging technologies.

4A – Plan for and coordinate ongoing, purposeful professional development

Knowledge of: needs assessments; resources (funding, technologies, and policies); stakeholder feedback; communications

4B – Identify and promote how technology can support educational best practices through communication and collaboration with the district instructional leadership

Knowledge of: needs assessment with instructional leaders; best practices (from research and collaboration with field); alignment of technology resources to support best practices; alignment of technology and curriculum standards

4C – Empower staff to reach a proficient level to meet the ongoing demands of their jobs

Knowledge of: staff proficiency assessment; alignment of job roles to technology resources; resource availability or need

4D – Promote standards for innovative teaching and learning that develop student proficiency in 21st century skills

Knowledge of: communicating 21st century skills; plan to share or communicate examples of standards and innovative teaching; collaboration with local education institutions to establish programs of interest for existing teachers; how to serve in an advisory capacity to develop new teachers

4E – Stay abreast of state and national standards, benchmarks, and frameworks for technology literacy

Knowledge of: organizations responsible for developing and modifying standards; collaborating with staff to share updates regarding standards; professional development associated with the standards

4F – Promote the application of technology to address the diverse needs of students and maximize student learning

Knowledge of: stakeholder needs; identification of resources; plan to share and/or facilitate professional development opportunities; examples of effective uses of technology to maximize learning for diverse students

5. Team Building and Staffing (9%)

Play an integral role in the district's strategic planning process; create and support cross-functional teams for decision-making, technology support, professional development, and other aspects of the district's technology program.

5A – Create cross-functional teams for appropriate aspects of the district's technology program

Knowledge of: district's organization; when to pull people together, who to pull together, and how to pull them together; roles and responsibilities within the district; who should be around the table; protocols; determining when a team is necessary; when and how to come to consensus

5B – Support cross-functional teams for appropriate aspects of the district's technology program

Knowledge of: the team's function; ensuring the resources to deliver on the functions (e.g., knowledge, funding, time, tools)

5C – Manage diverse, cross-functional teams that work and perform well

Knowledge of: distributed leadership; leadership skills

5D – Mentor and empower others to assume leadership roles; set clear objectives and measures; monitor process, progress, and results

Knowledge of: defining and setting expectations; establishment of agendas and targets; planning and coordinating meetings; meeting protocols; feedback; assigning defined responsibilities to others (e.g., delegation)

5E – Build an environment of trust through communication and transparency about decisions and how they are made

Knowledge of: purpose of any team; ensuring everyone is clear on the expectations of the team and their roles on the team; standards for team communications (who, what, when, where, how); proper follow-through on team commitments

5F – Use tools (e.g., quality improvement) for decision making to support effective teamwork

Knowledge of: team milestones; how and who to meet the milestones; framework for decision making that includes current state and desired state assessment information; scorecards, dashboards, and/or progress summary

5G – Build an environment that encourages team member communication

Knowledge of: engaging team members; communication protocols (reply to all or send to lead person, shared tool set); limiting positional power; ensuring everyone has the opportunity for input; issues associated with favorites; appropriate use of meetings; post-meeting follow-up that includes everyone

5H – Analyze and identify on an ongoing basis individual and team strengths, required areas of growth, and how teams and their members are being deployed and redeployed

Knowledge of: building teams based on the needs of the team and not the job; descriptions of individual strengths and weaknesses of the staff; separating fact from opinion; reconciliation of mixed messages; techniques for dealing with personalities and professional interactions

5I – Make effective hiring decisions using quantitative and qualitative data

Knowledge of: representative job descriptions; screening and interviewing processes that match the knowledge, skills, and dispositions necessary for success in the job; valid measures; measures that are appropriate for the position and the environment; validation of information sources

5J – Provide feedback to individuals and teams on a regular basis regarding areas of strength and required growth, using quantitative and qualitative data

Knowledge of: establishing team benchmarks; providing on-going feedback to the team; when to address the individual one on one and when to escalate to a supervisor; characteristics of feedback (e.g., timely, specific, corrective)

5K – Analyze the structure and organizational chart of the team relative to its ability to address the district strategic plan

Knowledge of: team function and responsibilities; clear job descriptions; accuracy and publication of organizational chart; involving board and cabinet as needed; assessing strategic plan for staffing requirements; needs analysis; alignment of staffing resources to needs; skills development

5L – Deploy staff to best address the district strategic plan and meet its goals

Knowledge of: realigning positions and reassigning staff based on data obtained from organization structure; working through HR and the budget process as necessary

6. Stakeholder Focus (9%)

Build relationships with all stakeholders, taking a close look at how the district determines requirements, expectations, and preferences. Understand the key factors that lead to stakeholder satisfaction, focusing on how the district seeks knowledge, satisfaction, and loyalty of students and other stakeholders.

6A – Build buy-in for the vision for the district’s technology program

Knowledge of: identifying stakeholder groups; structuring focus groups of representative stakeholders; importance of educating stakeholder groups; alignment of district goals with stakeholder goals

6B – Build relationships with stakeholders

Knowledge of: anticipating and then clarifying technology needs and/or interests for each group of stakeholders; positives and/or negatives for the stakeholder group and how to address each; communication models for listening and interpersonal skills; human metrics and methods of implementing successful human interactions

6C – Collaborate with stakeholders to create a vision for how technology will support the district’s strategic goals

Knowledge of: ensuring stakeholders know the district vision and strategic goals; solicit input and/or feedback from stakeholders for vision for technology; electronic collaboration tools that assist in stakeholder involvement

6D – Build and leverage effective partnerships with organizations that benefit district stakeholders

Knowledge of: building partnerships that can yield funding via grants or charitable contributions; identifying appropriate technology options to support volunteer and/or alternative efforts to improve education (e.g., enable network access outside traditional school hours); models for identifying opportunities and their requirements for supplementing district resources

6E – Effectively communicate using emerging technologies to reach stakeholders

Knowledge of: using newly emerged technologies to communicate with stakeholders (e.g., current tools like Twitter, Facebook, messaging systems); how each stakeholder selects preferred method(s) of communication

6F – Assess and respond to needs and concerns of all knowledge workers and stakeholders

Knowledge of: definition of “knowledge workers;” designing a means to gather and respond to needs and/or concerns of stakeholders; concepts behind survey development; synthesizing and aligning stakeholder needs; concerns with district goals and objectives

III. Managing Technology and Support Resources (30%)

7. Information Technology (9%)

Direct, coordinate, and ensure implementation of all tasks related to technical, infrastructure, standards, and integration of technology into every facet of district operations.

7A – Plan all tasks related to technical systems, network infrastructure, and technology device management

Knowledge of: system design; standards concepts (e.g., networking standards and interoperability); resources available (e.g., funding and people); rationale for technology choices made; need for training, readiness, and concept of scalability

7B – Implement all tasks related to technical systems, network infrastructure, and technology device management

Knowledge of: techniques for overseeing the implementation; alignment of roles and responsibilities to tasks and project management techniques

7C – Sustain all tasks related to technical systems, network infrastructure, and technology device management

Knowledge of: impact of choices made (e.g., if outsourced, still have to sustain); keeping up with availability and trends of emerging technology

7D – Evaluate all tasks related to technical systems, network infrastructure, and technology device management

Knowledge of: total cost of ownership; return on investment; pilot projects (e.g., meet goals, support education, comparison of plans to actual outcomes); communication with stakeholders; development of evaluation instruments

7E – Assess all tasks related to technical systems, network infrastructure, and technology device management

Knowledge of: application of results of evaluation and making the appropriate changes

7F – Direct, coordinate, and ensure implementation of all tasks related to the integration of technology into every facet of operations

Knowledge of: the meaning of integration in the education environment; which systems support which types of operations (e.g., purchasing systems related to cafeteria); how filtering has an impact on operations

7G – Develop, collect, interpret, and report metrics for all aspects of the IT system

Knowledge of: utilization, uptime statistics, and equity (e.g., number of devices); staff efficiency; ratios of technicians to students or devices; mean-time-to-repair (MTTR); who the users are and how the system was being used (students versus staff); how metrics are used by stakeholders

7H – Develop and implement disaster recovery and business continuity plans that are an integral part of the district’s technology program

Knowledge of: difference between disaster recovery and business continuity as well as best practices of both; resources that are “mission critical;” levels of risk; managing expectations

8. Communication Systems (7%)

Use technology to improve communication, directing and coordinating the use of e-mail, district websites, web tools, voice mail systems, and other forms of communication to facilitate decision-making and to enhance effective communication with key stakeholders.

8A – Direct and coordinate use of e-mail, district websites, web tools, voice systems, and other forms of communication

Knowledge of: which systems are in use and if they are interoperable with each other as well as how scalable they are; which stakeholders are accessing systems; how stakeholders are accessing systems; which emerging access options and devices are available; how to collaborate with stakeholders in the field about what is effective; how to maintain connections and/or collaboration with stakeholders in the field

8B – Use various communication tools and techniques

Knowledge of: emerging communication tools and their potential use within the education environment; building relationships with experts for recommendations and information on interoperability; information on what other districts are doing

8C – Accommodate technical issues related to implementation of various communication tools

Knowledge of: feedback from stakeholders on issues and needs; communicating with experts; currently installed systems; determination of interoperability issues or needs

8D – Resolve design, accessibility, and compliance issues related to keeping district, school, and teacher websites and other communication tools updated and operational

Knowledge of: organizational policies (e.g., acceptable use policy for students and employees, student information, copyrights, ethical use of district resources and internet); collaborating with experts and stakeholders to establish standard framework for content and security

8E – Enhance communication by keeping up to date on emerging technologies

Knowledge of: emerging communication tools and their potential use within the education environment; organizations responsible for sharing emerging technologies that enhance communications; conferring with experts in the communications field on standards and interoperability

8F – Maintain communication systems by ensuring that they are updated, compliant, and operational

Knowledge of: internal support capabilities; research on other support options; uptime requirements and the relationship to support; available resources; necessary compliancy requirements (e.g., archiving, use and abuse, security, and records retention)

9. Business Management (7%)

Manage the budget and serve as a strong business leader who guides purchasing decisions, determines the return on investment for all technology implementations, and fosters good relationships with vendors, potential funders, and other key groups.

9A – Identify funding sources available to the district and leverage them to meet district and programmatic goals

Knowledge of: differences between recurring sources and one-time funding; differences between capital and operational expenses and funding; matching funding; federal guidelines (e.g., Title I), E-Rate certifications and guidelines, grants, state funds

9B – Develop and manage budgets, both annually and long-range

Knowledge of: differences between leasing and purchasing; differences between fixed expenses and variable expenses; salary administration; differences between unit costs and extended costs; differences between budgeted costs and actual costs; budget cycle; fiscal year

9C – Develop accurate pricing estimates for technology initiatives by using TCO and VOI

Knowledge of: differences between TCO and VOI (soft and hard benefits); principles of TCO and VOI; tradeoffs

9D – Make effective purchasing decisions following relevant laws, policies, and guidelines

Knowledge of: bid and RFP processes; bulk purchasing, warehousing, just-in-time purchasing; aligning purchases to goals and needs; laws and monetary limits; quotes; contracts and contract negotiations; impact of inventory and insurance practices on purchasing decisions; asset management life cycle

9E – Manage district funds by following basic financial and accounting principles and processes and all regulatory guidelines

Knowledge of: differences between line item budgeting and categorical budgeting; financial reporting and forecasting; budget rollover or carryover; role of governing bodies in (re)appropriations of funds

9F – Direct, manage, and negotiate with vendors and business partners

Knowledge of: district and state policies and guidelines (e.g., monetary limits, lunch and other benefits, legal requirements, purchasing guidelines); volume purchasing; discounts; differences between leasing and purchasing and/or multi-year purchasing; ethical purchasing; task forces to bring in business partners; collaborating with business partners; in-kind contributions and donations; contacts with vendors that are appropriate; rules for negotiation; vendor performance management; process for a non-performing vendor

9G – Direct, coordinate, and ensure implementation of all tasks related to selection and purchasing (e.g., RFPs, purchasing guidelines)

Knowledge of: preparation of RFPs; milestones for contract payments based on implementation

9H – Budget for ongoing, purposeful professional development for all staff using new technologies

Knowledge of: budgeting and implementing of professional development; analyzing in-house services against contracted services; analyzing the scope of necessary training

I0. Data Management (7%)

Manage the establishment and maintenance of systems and tools for gathering, mining, integrating, and reporting data in usable and meaningful ways to produce an information culture in which data management is critical to strategic planning.

I0A – Establish systems and tools for gathering, warehousing, mining, integrating, and reporting data in usable and meaningful ways

Knowledge of: basic understanding of database structures and concepts (enter once/use many); effects of invalid data; authorizations and security standards; data streams and systems; platforms and interoperability; data frameworks and multi-dimensional data cubes as well as scalability; evaluating and managing user needs; requirements gathering

I0B – Maintain systems and tools for gathering, warehousing, mining, integrating, and reporting data in usable and meaningful ways

Knowledge of: data migrations; data loss management; monitoring health of data systems through reporting; understanding differences between web-based computing and cloud computing as well as differences between hosted and self-hosting

I0C – Make decisions based on data and related processes in support of stakeholders

Knowledge of: availability of on-demand data; needs assessment and/or gap analysis; automation of data capture; access to the right data for the right people

I0D – Administer data and databases following industry standards, (e.g., SIF and SCORM)

Knowledge of: definition, description, and differentiation between SIF and SCORM

IOE – Assess and respond to information reporting requirements related to government mandates

Knowledge of: alignment of input to output; collection of data needed to produce necessary reports; data validation processes; data needs of end-users

Appendix B

CoSN's CETL Candidate and Certificant
Code of Conduct and Terms of Confidentiality



CoSN's CETL Candidate and Certificant Code of Conduct and Terms of Confidentiality

Those holding CoSN's Certified Education Technology Leader (CETL) designation represent, through knowledge and conduct, the highest professional standards expected of an educational technology leader. Those seeking and holding the CETL agree to abide by the CETL Candidate and Certificant Code of Conduct and Terms of Confidentiality set forth below.

Certified Education Technology Leader Code of Conduct

Those seeking or holding the CETL certification agree to:

- Comply with all local, state, and federal laws, regulations, and statutes applicable to the field of education technology
- Demonstrate the highest standards of integrity and professional conduct
- Encourage others in the profession to act in an ethical and professional manner
- Fully and accurately disclose any professional or business-related conflicts or potential conflicts of interest in a timely manner
- Refrain from offering or accepting payments or other forms of compensation or tangible benefits, which do not conform with applicable laws and which may provide unfair advantage for themselves or others they may represent
- Conduct professional activities in a manner that is fair, honest, accurate, unbiased, and otherwise appropriate
- Respect and protect the intellectual property rights of others, and properly disclose and recognize the professional and intellectual contributions of others
- Strive to enhance professional capabilities, skills and knowledge; and accurately and truthfully represent professional qualifications
- Not discriminate on the basis of race, color, religion, national origin, age, sex, disability, family status, or any other local, state, or federally protected class
- Not obtain or attempt to obtain certification or re-certification by misrepresentation, bribery, fraud, or deception

Certified Education Technology Leader Terms of Confidentiality

Those seeking or holding the CETL certification agree as follows:

- The questions and answers on the CETL exam are the exclusive and confidential property of the Consortium for School Networking (CoSN), are copyrighted, and are protected by CoSN's intellectual property rights
- Not to disclose the exam questions or answers or discuss any of the content of the exam materials with any person without prior written approval of CoSN
- Not to remove from the examination room any exam materials of any kind provided to you or any other material related to the exam, including, without limitation, any notes or calculations
- Not to copy or attempt to make copies (written, photocopied, electronically, or otherwise) of any exam materials, including, without limitation, any exam questions or answers
- Not to sell, license, publish, reproduce, transmit, distribute, give away, or obtain from any other source other than CoSN the exam materials, including, without limitation, any exam questions or answers without the prior written approval of CoSN
- That obligations under the Terms of Confidentiality will continue in effect after the examination and, if applicable, after termination of your certification, regardless of the reason or reasons for termination and whether such termination is voluntary or involuntary

I have read the CoSN Code of Conduct and Terms of Confidentiality, and I agree to uphold and abide by its terms. I understand that a violation of the CoSN Code of Conduct and/or the Terms of Confidentiality may be grounds for disciplinary action, including cancellation of exam scores, denial or revocation of certified status, and/or disqualification from future examinations and programs. I also understand that the Code of Conduct and/or the Terms of Confidentiality Policy may be revised by CoSN at any time.

(NOTE: Those applying to sit for CETL exam will be prompted to accept these terms before being permitted to submit an online application.)

Appendix C

Self-Assessment for the CoSN Certified Education
Technology Leader (CETL) Certification Exam

Self-Assessment for the CoSN Certified Education Technology Leader (CETL) Certification Exam

COSN's Self-Assessment will help you determine your readiness for the CETL 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 21st century education technology leader.

The certification exam and this Self-Assessment is built on CoSN's **Framework of Essential Skills of the K-12 CTO**, which is the body of knowledge needed to be a viable and effective CTO in today's education environment. **The Framework**, which was developed by practicing CTOs, demonstrates that the responsibilities of a CTO are unique: not only must they possess technology skills; they must know how to apply these skills in the educational environment.

The Framework is comprised of three **primary professional categories** in the education technology field. Each of these categories includes **10 essential skill areas**:

- I. LEADERSHIP AND VISION—40% (Pages 2–4)**
 - A. Leadership & Vision – 15%
 - B. Strategic Planning – 15%
 - C. Ethics & Policies – 10%
- II. UNDERSTANDING THE EDUCATIONAL ENVIRONMENT—30% (Pages 5–7)**
 - A. Instructional Focus & Professional Development – 12%
 - B. Team Building & Staffing – 9%
 - C. Stakeholder Focus - 9%
- III. MANAGING TECHNOLOGY & SUPPORT RESOURCES—30% (Pages 8–11)**
 - A. Information Technology Management – 9%
 - B. Communication Systems Management – 7%
 - C. Business Management – 7%
 - D. Data Management – 7%

Under each of these essential skill areas are specific competencies identified in the **Framework**. This Self-Assessment is constructed from those competencies and the related knowledge identified in the **Framework**.

In each section of the Self-Assessment, review the essential skill area and the related knowledge necessary to fulfill these competencies. Using the keys provided, consider your current level of understanding and experience in each skill area. This is your personal assessment of competence. Then determine the gap, if any, that exists and whether any additional development is needed. This exercise will help you assess your current readiness for the CETL certification exam and identify areas where additional experience, study, mentoring,

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

I. LEADERSHIP & VISION (40%)

A - Leadership & Vision (15%)

Definition: Work closely with the executive team and stakeholders to develop a shared vision with long-term, big-picture perspectives on district goals to plan for meaningful and effective uses of technology; provide leadership when creating a vision of how technology can help meet district goals.

Related Knowledge	Competence	Gap
Strategic planning techniques to create a vision for how technology will support a district's strategic and operational goals		
Ensuring focus on shared goals and sense of a common mission		
Systemic planning skills and use of decision-making rules for priority setting		
Organizational structure (formal and informal), history, and profile of all stakeholders		
Processes (methods) that recognize individual stakeholder contributions		
Definition of roles, responsibilities, and expectations for advisory committees necessary for effective use of technology to support district goals		
Effective collaboration and interpersonal communication skills, e.g., listening, asking questions to solicit best ideas, relationship-building, consensus-building, communicating the need for change, using effective power-sharing techniques, camaraderie to ensure success		
Personal communication skills, e.g., marketing collateral (print and online), public speaking, storytelling		
Organizational and time-management skills		
Constructive conflict management		
Current technologies		
Scope and value of emerging and promising technologies		
Technologies that can positively impact teaching and learning in the interdependent environment of assessment, curriculum, and instruction		
Role of technology to enhance efficiency and effectiveness of current practices and related cost-reduction opportunities		
Forecasting return on investment and benchmark measurements for key innovations		
Ensuring effective, challenging, and engaging learning for all students		
Sources and nature of educational content and processes		
Assessment best practices, e.g., how to assess key instructional activities, learning diagnostics, assessment of and accommodations for learning styles, educational terminology		
Cultural context of change; management and facilitation of the change process		
Role of professional development in the change process		
Building support for change through a variety of mechanisms, e.g., learning by example and personal and mass communication		
Use of data to help people draw conclusions		

KEY:

Level of Competence

- 4 – Expert level of understanding/experience
- 3 – Moderate level of understanding/experience
- 2 – Basic level of understanding/little or no experience
- 1 – Little or no exposure

Development Gap

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

I. LEADERSHIP & VISION (40%) Con't

B – Strategic Planning (15%)

Definition: Have a high-level view across the school system and work with instructional and technical teams to identify steps needed to transform the technology vision into a long-range plan, complete with specific goals, objectives, and action plans.

Related Knowledge	Competence	Gap
Strategic planning best practices and identification of system leaders		
Technology frameworks and alignment of technology and resources (people, capital, expenses) to strategic goals		
Alignment of performance evaluations to strategic goals		
Conducting a needs assessment		
Budget development (chart of accounts)		
Funding sources (federal, state, local, and public/private grants), donations		
Use of financial information, financial and non-financial metrics		
Alignment and communication of research to support VOI best practices		
Modeling implementation of industry best practice methodologies, tools, and programs (TCO, ITIL, SDLC, Baldrige, etc.) to support strategic goals		
Project management skills and prioritization of concepts to implementation, including determining relative priorities of competing demands		
Identification of all district systems and their departments, e.g., instruction, assessment, finance, facilities, transportation, security, food service		
Integration of and relationships among various departments		
Methods of finding evidence and examples of successful technology-based solutions for each district system and department		
Measurements for how technology supports each system or department		
Communicating results of evidence and examples of successful solutions found for each district system and department, e.g., case study		
Development of a technology and systems security plan		
Periodic and ongoing backup and recovery tests		
Establishment of redundancy systems to support business and instructional initiatives, assessment of risk, and potential impact		
Use of metrics and data on goals, strategies, and budget to support technology plan		
Communicating meaningful reports to stakeholders on technology plan		
Disaster recovery/business continuing planning best practices, examples of successes and failures, and a phased-in plan to include multiple solutions		
Involving stakeholders in disaster recovery/business continuity planning—in defining and refining the plan and in drills		
Conveying complex technology concepts in familiar terms to non-technology staff, including translating data and statistics into easily understood graphical representations of goals and objectives		
Engineering solutions based on goals and objectives		
Developing solutions for creating a process of continuous improvement		

KEY:

Level of Competence

- 4 – Expert level of understanding/experience
- 3 – Moderate level of understanding/experience
- 2 – Basic level of understanding/little or no experience
- 1 – Little or no exposure

Development Gap

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

I. LEADERSHIP & VISION (40%) Con't

C – Ethics and Policies (10%)

Definition: Manage the creation, implementation, and enforcement of policies and educational programs relating to the social, legal, and ethical issues related to technology use throughout the district and modeling responsible decision-making.

Related Knowledge	Competence	Gap
Collaboration with all impacted departments to ensure adherence to state and federal laws		
Process for demonstrating and monitoring personal and system compliance		
Policies and procedures at all levels, e.g., district, federal, e-Rate		
Maintenance of records indicating personal and system compliance		
Examples of best practices of appropriate ethical and professional behavior for technology use		
Resources for maintaining current information about laws and legal issues and how district departments, policies, and practices are impacted		
Communication via multiple methods and current information about laws and legal issues		
Cyber security and physical security, potential vulnerabilities, and related issues for both students and staff		
Best preventive practices and policies to impact vulnerabilities		
Alignment of technology planning and implementation to goals for environmental protection, energy-saving practices, and appropriate equipment disposal		
Communicating and collaborating with others in the policy development process		
Definition of a high-performing learning environment		
Ensuring policies and the policy development process to support a high-performing learning environment		
Definition of equitable access		
Structuring technology expenditure formulas to accommodate equity		
Identification of stakeholders in the equitable process, as determined by district practice and/or policies		
Assessment of needs of diverse students and staff, e.g., Universal Design for Learning (UDL) information, IDEA, ESL, special needs		

KEY:

Level of Competence

- 4 – Expert level of understanding/experience
- 3 – Moderate level of understanding/experience
- 2 – Basic level of understanding/little or no experience
- 1 – Little or no exposure

Development Gap

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

II. UNDERSTANDING THE EDUCATIONAL ENVIRONMENT (30%)

A – Instructional Focus and Professional Development (12%)

Definition: Budget, plan, and coordinate ongoing, purposeful professional development for all staff using technologies; ensure a sufficient budget through the implementation and assessment process of emerging technologies.

Related Knowledge	Competence	Gap
Conducting a needs assessment to ensure purposeful professional development, including collaboration and communication with instructional leaders and assessment of staff proficiency		
Resources (funding, technologies, and policies) needed for purposeful professional development		
Communicating with stakeholders and gathering feedback regarding professional development		
Research, collaboration with the field, and collaboration with district instructional leadership to identify and promote technologies that support educational best practices		
Alignment of technology resources to support best practices		
Alignment of technology and curriculum standards		
Alignment of job roles to available and/or needed technology resources to empower staff to successfully meet ongoing job demands		
Communication and promotion of student proficiency in 21st century skills		
Examples of standards for innovative teaching and learning that develop student proficiency in 21st century skills		
Collaboration with local education institutions to establish professional development programs of interest to teachers		
Serving in advisory capacity to develop skills for new teachers		
Organizations responsible for developing and modifying state and national standards, benchmarks, and frameworks for technology literacy		
Collaboration with staff to share updates regarding standards		
Conducting professional development targeting standards		
Diverse needs of students and other stakeholders		
Identification of technology resources to address diverse needs of students		
Providing or facilitating professional development opportunities to address diverse needs of students and other stakeholders		
Examples of effective uses of technology to maximize learning for diverse students		

KEY:

Level of Competence

- 4 – Expert level of understanding/experience
- 3 – Moderate level of understanding/experience
- 2 – Basic level of understanding/little or no experience
- 1 – Little or no exposure

Development Gap

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

II. UNDERSTANDING THE EDUCATIONAL ENVIRONMENT (30%)

B – Team Building and Staffing (9%)

Definition: Play an integral role in the district’s strategic planning process; create and support cross-functional teams for decision-making, technology support, professional development, and other aspects of the district’s technology program.

Related Knowledge	Competence	Gap
District organization and related roles and responsibilities		
Purpose of a cross-functional team and determining when it is necessary for appropriate aspects of the district technology plan		
Creating cross functional teams, including who to pull together and when, and protocols for creating the team		
Resources (knowledge, funding, time, tools) to deliver on team’s purpose		
Leadership skills to manage diverse teams, ensuring distributed leadership		
Defining and setting clear purpose, objectives, and expectations of any team		
Establishing agendas, targets, and measures		
Planning and coordinating meetings, including meeting and communication protocols, and providing post-meeting follow-up that includes everyone		
Team communication standards (who, what, when, where, how)		
Delegating responsibilities		
Ensuring everyone is clear on team expectations and individual roles		
Gathering feedback and monitoring process, progress, and results of team activities; facilitating when and how a team comes to consensus		
Ensuring proper follow-through on team commitments		
Decision-making tools to support effective teamwork, e.g., identifying who needs to be involved; establishing/monitoring timelines; determining how to meet milestones; using scorecards, dashboards, progress summary		
Framework for decision making that includes current and desired district, state, and other assessment information		
Engaging team members and ensuring everyone has opportunity for input		
Team building based on team needs and not the job		
Separating fact from opinion, reconciling mixed messages, limiting positional power, and dealing with personalities and professional interactions		
Effective screening and interviewing processes, including quantitative and qualitative data for making decisions, and validation of information sources		
Representative and clear job descriptions		
Ongoing feedback to individuals and teams on strengths and required growth, using quantitative and qualitative data, and establishing benchmarks		
Analysis of team structure and organization chart relative to supporting strategic plan, with clear team function and responsibilities		
Accurate, published organization chart, involving board/cabinet as needed		
Strategic plan for staffing requirements, aligning staffing resources to needs		
Staff skills development, including empowering others to leadership roles		
Using data to deploy or reassign staff to best meet strategic plan goals, working with HR and the budget process as necessary		

KEY:

Level of Competence

- 4 – Expert level of understanding/experience
- 3 – Moderate level of understanding/experience
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- 1 – Little or no understanding/experience

Development Gap

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

II. UNDERSTANDING THE EDUCATIONAL ENVIRONMENT (30%)

C – Stakeholder Focus (9%)

Definition: Build relationships with all stakeholders, taking a close look at how the district determines requirements, expectations, and preferences. Understand the key factors that lead to stakeholder satisfaction, focusing on how the district seeks knowledge, satisfaction, and loyalty of students and other stakeholders.

Related Knowledge	Competence	Gap
Identification of all stakeholder groups needed for buy-in of vision of technology program		
Collaboration with stakeholders to create a vision for how technology will support district goals		
Soliciting input and/or feedback from stakeholders for vision for technology		
Focus groups for representative stakeholders		
Concepts for survey development		
Anticipation and clarification of stakeholder group technology needs and/or interests		
Communication models for listening to stakeholder input and feedback		
Interpersonal communication skills to collaborate with stakeholders on vision for how technology will support district's strategic goals		
Human metrics and methods of implementing successful human interactions		
Definition of "knowledge worker"		
Addressing and responding to stakeholder and all knowledge worker input, feedback, issues (positive or negative), and concerns		
Synthesizing and aligning stakeholder needs and/or concerns		
Alignment of district goals with stakeholder goals		
Ensuring stakeholders know district vision and strategic goals		
Electronic collaboration tools that assist in stakeholder involvement		
Partnerships that can yield funding via grants or charitable contributions		
Identifying appropriate technology options to support volunteer and/or alternative efforts to improve education		
Models for identifying opportunities and their requirements for supplementing district resources		
Using emerging technologies, e.g., Twitter, Facebook, messaging systems, to effectively communicate with stakeholders		
Responding to stakeholder preferred method(s) of communication		

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Level of Competence

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Development Gap

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III. MANAGING TECHNOLOGY AND SUPPORT RESOURCES (30%)

A – Information Technology Management (9%)

Definition: Direct, coordinate, and ensure implementation of all tasks related to technical, infrastructure, standards, and integration of technology into every facet of district operations.

Related Knowledge	Competence	Gap
System design		
Standards concepts, e.g., networking standards and interoperability		
Available resources, e.g., funding and people, for planning all tasks related to technical systems, network infrastructure, and technology device management		
Rationale for technology choices		
Needs assessment of training, readiness, and concept of scalability		
Techniques for overseeing implementation of technical systems, network infrastructure, and technology device management		
Alignment of roles and responsibilities to tasks, and project management techniques		
Assessing impact of choices made, e.g., for outsourced options		
Staying abreast of emerging technology trends		
Evaluation of TCO and ROI		
Conducting pilot projects, e.g., to meet goals, support education, with comparison of plans to actual outcomes		
Development of evaluation instruments		
Stakeholder communication regarding evaluation results		
Application of evaluation results and making appropriate changes		
Meaning of “integration of technology into every facet of operations” in the education environment		
Systems to support specific types of operations, e.g., purchasing systems for food services		
Impact of filtering on operations		
Developing, collecting, interpreting, and reporting metrics for all aspects of IT system, e.g., utilization, uptime statistics, equity (number of devices, etc.), ratio of technicians to students or devices, mean-time-to-repair, who users are, how students and staff are using the system, staff efficiency		
How stakeholders make use of metrics		
Contrast between disaster recovery and business continuity		
Identification of “mission critical” resources		
Identification of levels of risk		
Development of disaster recovery plans built on best practices		
Development of business continuity plans built on best practices		
Managing stakeholder expectations for disaster recovery and business continuity		

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III. MANAGING TECHNOLOGY AND SUPPORT RESOURCES (30%)

B – Communication Systems Management (7%)

Definition: Use technology to improve communication, directing and coordinating the use of e-mail, district websites, web tools, voice mail systems, and other forms of communication to facilitate decision-making and enhance effective communication with key stakeholders.

Related Knowledge	Competence	Gap
Communication systems currently installed and in use, their interoperability with one another, and the scalability of each		
Identification of which stakeholders are accessing which systems and how		
Emerging access options, devices, and communication tools and the potential use of each in the education environment		
Collaboration with stakeholders in the field about what is effective and maintaining collaboration and connections		
Building relationships and communicating with experts for recommendations and information on standards, interoperability, and other districts' successful use of communication systems		
Gathering and responding to feedback from stakeholders on communication systems issues and needs		
Organizational policies, e.g., acceptable use policy for students and employees; student information; copyrights; ethical use of district resources and internet necessary to keep district, school, and teacher websites and other communication tools updated, compliant, and operational		
Collaboration with experts and stakeholders to establish standard framework for content and security to keep district, school, and teacher websites and other communication tools updated, compliant, and operational		
Organizations responsible for sharing information on emerging technologies that enhance communications		
Identifying internal support capabilities and available resources		
Research on support options, including uptime requirements and the relationship to support		
Compliance requirements, e.g., archiving, use and abuse, security, records retention		

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III. MANAGING TECHNOLOGY AND SUPPORT RESOURCES (30%)

C – Business Management (7%)

Definition: Manage the budget and serve as a strong business leader who guides purchasing decisions, assists in determining return on investment for all technology implementations, and fosters good relationships with vendors, potential funders, and other key groups.

Related Knowledge	Competence	Gap
Funding sources available to meet district and programmatic goals - grants, federal funds, state funds, matching funds, others		
Differences between recurring resources and one-time funding		
Differences between capital and operational expenses and funding		
Differences between leasing and purchasing and/or multi-year purchasing		
Differences between fixed and variable expenses		
Differences between unit costs and extended costs		
Differences between budgeted costs and actual costs		
Differences between TCO and VOI (soft and hard benefits) and tradeoffs		
Differences between line item budgeting and categorical budgeting		
Federal guidelines, e.g., Title I and e-Rate certifications and guidelines		
Salary administration		
Budget cycle and fiscal year		
Bid and RFP processes and preparation		
Bulk purchasing, warehousing, just-in-time purchasing, volume purchasing		
Aligning purchasing to strategic goals and needs		
Laws and monetary limits		
Quotes, contracts, and contract negotiations, including rules for negotiation		
Impact of inventory and insurance practices on purchasing decisions		
Asset management life cycle		
Financial reporting and forecasting		
Budget rollover or carryover		
Role of governing bodies in (re)appropriation of funds		
District and state policies and guidelines, e.g., monetary limits, lunch and other benefits, legal requirements, purchasing guidelines relevant to negotiating with and managing vendors and business partners		
Discounts		
Ethical purchasing		
Creating task forces to bring in business partners		
Collaborating with business partners and maintaining appropriate contacts with vendors		
Donations and in-kind contributions		
Vendor performance management, process for a non-performing vendor, and milestones for contract payments based on implementation		
Analyzing the scope of necessary professional development for staff using technologies, budgeting and implementing it, including analysis of in-house services against contracted services		

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Level of Competence

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III. MANAGING TECHNOLOGY AND SUPPORT RESOURCES (30%)

D – Data Management (7%)

Definition: Manage the establishment and maintenance of systems and tools for gathering, mining, integrating, and reporting data in usable and meaningful ways to produce an information culture in which data management is critical to strategic planning.

Related Knowledge	Competence	Gap
Basic understanding of database structures and concepts for gathering, warehousing, mining, integrating, and reporting data in meaningful ways		
Systems and tools for gathering, warehousing, mining, integrating, and reporting data in meaningful ways		
Effects of invalid data		
Authorization and security standards		
Data streams and systems		
Platforms and interoperability		
Data frameworks and multi-dimensional cubes		
Assessing scalability		
Evaluating and managing user needs		
Requirements gathering		
Data migrations		
Data loss management		
Monitoring health of data systems through reporting		
Differences between web-based computing and cloud computing		
Differences between hosted and self-hosting		
Availability of on-demand data for decision making to support all stakeholders		
Conducting a stakeholder needs assessment and/or gap analysis for decision making		
Automation of data capture		
Ensuring access to the right data for the right people		
Definition, description, and differentiation between SIF and SCORM and other industry standards		
Alignment of input to output necessary for responding to information reporting requirements related to government mandates		
Collection of data to produce necessary reports		
Data validation processes		
Identification of end-user data needs		

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Appendix D

Recertification Activities Tracking Tool

(CETL) Recertification Activities Tracking Tool

Your CETL certification will expire three years after the date of issue. _____ (enter your expire date here)

To remain certified, you are required to stay current in the CTO field by completing 60 hours of continuing education activities (CEAs). All activities must be tied to one or more of the ten skill areas identified in the [Framework](#). In addition, your recertification activities must take place within your three-year certification cycle.

Note: CEAs are calculated on a 1:1 basis (for example: 1 hour at a conference session = 1 CEA hour) unless otherwise noted below. Credit is only awarded for education-related activities (registration, exhibit hall, and meal time hours, for instance, should not be included in your calculations).

Keep track of your CEAs as you complete them. Once you have accumulated 60 hours of activities, you may submit your application to recertify. Your activities will not be monitored or approved by CoSN until you have accumulated the required 60 hours and your application is submitted. If you have questions about a specific activity, please email us at certification@cosn.org.

You may use your own methods for tracking your recertification activities or you may use the charts on the following pages.

Continuing Education

Includes activities such as conferences, seminars, college courses, on-the-job professional development classes, or other educational activities.

Maximum of 60 hours

Name of activity/location	Date completed	Number of hours	Framework Skill Area
Description of Activity			
Name of activity/location	Date completed	Number of hours	Framework Skill Area
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Description of Activity			
Name of activity/location	Date completed	Number of hours	Framework Skill Area
Description of Activity			

E-Learning/Online Courses

Courses in which you are given an assessment at the end of the course, and/or include college credit.

Maximum of 60 hours

Courses with no assessment or college credit (e.g., webcasts, videoconferences, podcasts).

Maximum of 20 hours

Name of activity/location	Date completed	Number of hours	Framework Skill Area
Description of Activity			
Name of activity/location	Date completed	Number of hours	Framework Skill Area
Description of Activity			
Name of activity/location	Date completed	Number of hours	Framework Skill Area
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Name of activity/location	Date completed	Number of hours	Framework Skill Area
Description of Activity			

Industry-Related Certification

Four (4) hours will be awarded per industry-related certification (e.g., Comp TIA, CISSP). *Maximum of 12 hours*

Teaching/Instruction

Instructional hours are awarded on a 1:1 basis (note: credit is only awarded for the first time the instruction is given). In addition, 3 hours will be awarded per activity for prep time

Maximum of 30 hours

Name of activity/location	Date completed	Number of hours	Framework Skill Area
Description of Activity			
Name of activity/location	Date completed	Number of hours	Framework Skill Area
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Description of Activity			
Name of activity/location	Date completed	Number of hours	Framework Skill Area
Description of Activity			

Professional Membership

Membership in an organization related to the education technology field (e.g., CoSN, ISTE, etc.)

2 hours per year, per membership

Name of activity/location	Date completed	Number of hours	Framework Skill Area
Description of Activity			
Name of activity/location	Date completed	Number of hours	Framework Skill Area
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Name of activity/location	Date completed	Number of hours	Framework Skill Area
Description of Activity			

Published Works

Articles, blogs, and other related works that impart knowledge related to the 10 skill areas.

4 hours per article. Maximum of 12 hours

Name of activity/location	Date completed	Number of hours	Framework Skill Area
Description of Activity			
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Description of Activity			

Volunteer/Leadership Work

Work performed outside your job related to one of the 10 skill areas (e.g., CoSN Committee, mentoring, focus group participation).
One hour of work = one hour of credit.

Maximum of 20 hours

Name of activity/location	Date completed	Number of hours	Framework Skill Area
Description of Activity			
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Continuing Education

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Maximum of 60 hours

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Description of Activity			

E-Learning/Online Courses

Courses in which you are given an assessment at the end of the course, and/or include college credit.

Maximum of 60 hours

Courses with no assessment or college credit (e.g., webcasts, videoconferences, podcasts).

Maximum of 20 hours

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Maximum of 30 hours

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Professional Membership

Membership in an organization related to the education technology field (e.g., CoSN, ISTE, etc.)

2 hours per year, per membership

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Published Works

Articles, blogs, and other related works that impart knowledge related to the 10 skill areas.

4 hours per article. Maximum of 12 hours

Name of activity/location	Date completed	Number of hours	Framework Skill Area
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Work performed outside your job related to one of the 10 skill areas (e.g., CoSN Committee, mentoring, focus group participation).
One hour of work = one hour of credit.

Maximum of 20 hours

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