



Portfolio Submission Guide & Assessment Form

Introduction

This *Portfolio Submission Guide & Assessment Form* has been developed to assist individuals in their pursuit of the Certified International Trade Professional (CITP) designation.

The portfolio requirements, aligned with the 15 competency categories presented in the [CITP Competency Profile](#), is designed to assess what a competent practitioner must know in order to consistently perform to the required standard of practice as well as an understanding of the tasks a competent practitioner must be able to perform. A successful portfolio will provide an individual the opportunity to earn the CITP designation.

Portfolio Assessment – Frequently Asked Questions

- **What is a portfolio?**

A portfolio submitted to FITT is a record of your learning gained from work and/or educational experience as it relates to international trade competencies. The portfolio is developed by you to support your claim of competence and request to earn the CITP designation. Please refer to the *Portfolio Checklist* section for a complete description of the portfolio contents.

- **Who will assess my portfolio?**

Members of the FITT Certification Council (Council) will assess your portfolio, along with your complete CITP application. The Council is the governing body responsible for the certification program. The Certification Council develops, maintains, and oversees the CITP in adherence with best practices and recognized standards for certification programs. Assessors evaluate each submission according to the CITP competencies.

- **What if I am not satisfied with the assessment of my portfolio?**

The Council will identify the areas in which you require additional experience. The reason for not approving your complete application could also be due to incomplete or insufficient information within the portfolio. The Council may request additional materials to further help demonstrate your skills and knowledge in relation to the competencies.

Applicants that do not have sufficient experience related to one or more of the 15 CITP competency categories will have an opportunity to address those gaps either via completion of relevant FITTskills course(s) and/or Challenge Exam(s) OR by resubmitting a portfolio once they've gained further professional experience or other relevant educational experience.

- **What are the fees to submit a portfolio?**

The CITP application fee is CAD \$570.00, which includes costs associated with submission of all application documents.

- **How will I find out the results of my portfolio submission?**

The results of your portfolio will be communicated to you in writing once your complete CITP application has been reviewed. Visit the [CITP Certification Process](#) page to review all eligibility requirements.

Before You Begin

Completing the portfolio can be time consuming. Read this document carefully, review the [CITP Competency Profile](#) and use the self-assessment section of the “Competency Self-Assessment and Evidence Grid” to evaluate your knowledge of the competencies. The self-evaluation process will help you assess your strengths and weaknesses and help to determine if you meet the eligibility requirements to apply for the CITP designation via the pathways requiring a portfolio submission. These pathways are:

1. **Pathway 2 – International Business (IB) Educational Credential Holders:**

Eligibility requirements

- Applicants that have completed a minimum 2-year post-secondary international business program OR 1-year post-graduate international business program that

covers content related to one or more of the 15 CITP competency categories can apply under Pathway 2.

AND

- Minimum of 3 years of full-time work experience in a role that is primarily focused on international trade and is related to one or more of the 15 CITP competency categories.

Important

- The educational & work experience combined must cover **all** 15 CITP competency categories. **Applicants must complete a portfolio based on past work experience and education.** Applicants that do not have sufficient experience related to one or more of the 15 CITP competency categories will have an opportunity to address those gaps either via completion of relevant FITTskills course(s) and/or Challenge Exam(s) OR by resubmitting a portfolio once they've gained further professional experience or other relevant educational experience.

2. **Pathway 3 – Specialized Credential Holders: *pathway is currently unavailable***

Eligibility requirements

- Credential holders of specialized certification programs: Applicants that hold a certification pre-approved by FITT as meeting one or more of the 15 CITP competency categories can apply under Pathway 3. Their certification status must be in good standing at the time of application.

OR

Credential holders of specialized educational credentials: Applicants achieving an educational credential that is pre-approved by FITT as meeting one or more of the 15 CITP competency categories can apply under Pathway 3.

AND

- Minimum of 3 years of full-time work experience in a role that is primarily focused on international trade and is related to one or more of the 15 CITP competency categories.

Important

- **Individuals that have earned a specialized credentials that does not meet all of the 15 CITP competency categories**: Individuals with specialized credentials that do not meet all of the 15 CITP competency categories will need to ensure they have other

sufficient experience covering the CITP competency categories that are not covered in the pre-approved specialized credential program. **Applicants must complete a portfolio based on past work experience and, if relevant, education.** Applicants that do not have sufficient experience related to one or more of the 15 CITP competency categories will have an opportunity to address those gaps either via completion of relevant FITTskills course(s) and/or Challenge Exam(s) OR by resubmitting a portfolio once they've gained further experience.

- There are currently no specialized credentials pre-approved by FITT under Pathway 3. FITT will update its website as credentials are approved. Check back frequently!

We encourage you to contact certificatoin@fitt.ca if you have any questions before you begin preparing your portfolio submission.

Preparing Your Submission

To prepare for your portfolio submission you must evaluate yourself against the competencies and demonstrate your mastery of the competencies. Your portfolio is a record of your learning gained from work experience and/or education and will be evaluated by the Council, along with your complete CITP application form.

The following steps will help you prepare your submission:

- **Step 1: Competency Self-Assessment**

Complete the "*Step A: Self-Assessment*" section of the *Competency Self-Assessment and Evidence Grid*. Rate your knowledge of each competency. Choose "0" if you do not have experience in a particular area and 5 if you are an expert.

One of the most difficult tasks is deciding what to include in your portfolio. The art of building a portfolio is a learning process in itself and typically includes the following stages:

- familiarization with the competencies for each of the 15 CITP competency category (review the "*Competency Self-Assessment and Evidence Grid*" and [CITP Competency Profile](#))

- a self-assessment of your abilities and your knowledge related to the competencies
 - identifying sources of help and guidance
 - identifying appropriate sources of evidence
 - compiling the evidence
 - presenting your portfolio for assessment as part of your complete CITP application
- **Step 2: List Supporting Evidence**

The evidence you provide must be categorized in five different areas within the *Competency Self-Assessment and Evidence Grid* under "*Step B: List Supporting Evidence*".

The following examples for each category are provided as a guideline only:

1. Educational → transcripts, certificates, diplomas, course descriptions related to international trade
2. Projects and Reports → course tests, projects, assignments or strategies
3. Professional Experience → workplace products or assessments, job descriptions, work history, resume
4. Other

Define your evidence by indicating which category it belongs to (see examples above). You may refer to your resume, job descriptions, projects/reports you have completed, courses you have taken, description of your experience in the area, and so on. When necessary, attach specific evidence as an appendix to your portfolio.

Complete the evidence grid for all competency categories in which you must prove adequate experience. Evidence for each competency category must be provided – see section "*Evidence for your Portfolio*" for detailed information. Important:

- Pathway 2 applicants are required to complete a portfolio submission that covers all 15 CITP competency categories.
- Pathway 3 applicants are only required to complete a portfolio if the pre-approved program was confirmed as not meeting all 15 CITP competency categories. In this case, they are required to complete a portfolio submission that covers all competency categories that were not covered in the pre-approved program.

- **Step 3: Organizing Your Supporting Documentation**

Present your supporting documentation in a professional manner. This step is important to ensure that the Council is able to fairly assess your portfolio as part of your complete CITP application. Please follow the guidelines under *Portfolio Checklist* to avoid unnecessary delays in processing your CITP application. The way in which you organize your supporting documentation is important. The Council should find everything easy to follow and evidence should be clearly labelled. The Council should be able to easily understand the relevance of the evidence and it should be directly mapped to the appropriate competency category on the Competency Self-Assessment and Evidence Grid.

- **Step 4: Submitting Your Portfolio**

When you have organized all your supporting documentation in one file, you can proceed with [applying for the CITP designation](#) via the appropriate form. See section below titled *Portfolio Checklist* for documentation needed and further instructions.

Portfolio Checklist

Documents to upload with your portfolio

- Introductory page: summarize the details of your portfolio submission
- Supporting documentation and evidence for each skills areas/competency level

Supporting documentation format guidelines

- Use a minimum of two (2) to a maximum of five (5) pages of evidence per skills areas/competency level
- Limit your supporting documentation to sixty (60) pages or less
- Clearly label each document
- Include all parts in a single document

Supporting documentation and evidence

- Is relevant to the competencies
- Has met most of the criteria for competency category
- Has not breached confidentiality of any sensitive information
- Follows the guidelines of two (2) to five (5) pages of evidence per core competency

- Is laid out in a clear and consistent way
- Is easy for Council members to understand and follow when assessing your portfolio

Evidence for Your Portfolio

The amount of evidence required will depend on a number of factors. Minimum would be two items of evidence per skills areas/competency level, provided this meets the competency criteria outlined within the evidence grid. A single item of evidence is unlikely to demonstrate your competence in a particular area. A number of items collected over a period of time may be required.

Is there evidence of knowledge and application?

Knowledge and application are critical to competent performance. You must be able to demonstrate that you have the appropriate supporting knowledge and understanding related to the competencies. The Council may want to ask you some questions when you submit your complete CITP application to verify knowledge and understanding relating to the competencies. FITT will notify you if further information is required.

Authenticity of the Evidence in your Portfolio

The Council must ensure that all of the evidence is your own work. It may be necessary for the Council to ask questions about the evidence that you have provided or to collect further evidence in order to confirm that the content of your portfolio is authentic.

Sufficient Evidence

Sufficient evidence has been achieved if:

- all of the competencies within each competency category have been correctly addressed
- your evidence is authentic
- your performance is consistent and can be demonstrated over a period of time
- you can demonstrate that you have the relevant knowledge and understanding and can apply it to international trade
- you have included two (2) to five (5) pages of evidence for each skills areas/competency level

Types of Evidence

The best practice in the assessment of prior learning indicates that diverse sources of evidence should be used to support one's claim of competence. Each competency category has a list of identified skills areas/competency level to be met with at least two (2) to five (5) types of evidence (documentation) from any of the categories below to support your request.

Types of Evidence		
Knowledge Evidence	Performance Evidence	Evidence of Prior Learning
Gathered from any or all of the following sources: <ul style="list-style-type: none">- tests, reports, documents- designs- products- projects or assignments- testimonials from employers / teachers	Gathered from any or all of the following sources: <ul style="list-style-type: none">- observation in workplace- workplace examples- simulations- skill tests- job description- performance appraisal- testimonials	Gathered from any or all of the following sources: <ul style="list-style-type: none">- certificates, diplomas- transcripts- course outlines and descriptions related to international trade- workshop and conference outlines or descriptions

The evidence you provide is categorized in five different areas within the **Competency Self- Assessment and Evidence Grid**, examples for each category are provided as a guideline only:

Educational → transcripts, certificates, course descriptions

Projects and Reports → course tests, projects, assignments or strategies

Professional Experience → workplace products or assessments, job descriptions, work history, resume

Other

The Evidence Grid

The evidence grid is a means of outlining your competency associated with each competency category. More importantly it is a method used to organize and communicate to the Council specifically what your evidence is and where it can easily be found within your portfolio. The evidence grid outlines several competencies required for each competency category.

You should aim to provide at least two different sources of evidence for each skills areas/competency level within a competency category. This will help the Council to build a total picture of your skills and abilities.

The following provides an example of how to use the **Competency Self-Assessment and Evidence Grid**:

How to Complete the 'Competency Assessment' Form

Competency	Step A Self Assessment						Step B List Supporting Evidence
	NIL 0	1	2	3	4	Expert 5	
Identifies pricing strategies and methods	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Educational: Successfully completed two week marketing course (e.g. at University of Toronto). See Appendix one for course description
Designs a Marketing Plan	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Professional Experience: Was team leader for Marketing Plan project (e. g. at FITT). See résumé.

Rate Yourself
Refer to Evidence

Portfolio Tips

- ✓ Approach building your portfolio as you would a resume and/or preparing for a comprehensive job application.
- ✓ Look professional and be organized – reviewing your portfolio should be easy for the Council. A well-organized portfolio will demonstrate your competencies most effectively.
- ✓ Be accurate by providing the necessary background information. Give numbers, show results, give facts; not opinions or impressions.
- ✓ Be succinct, yet descriptive. Remember you must demonstrate your mastery of the competencies. Avoid information that does not add to your claim.
- ✓ In general, quality is better than quantity.
- ✓ Show your mastery of the competencies – read the competencies to make sure your evidence demonstrates your mastery of the competencies.
- ✓ Do not duplicate information.
- ✓ Use the *Competency Self-Assessment and Evidence Grid* as a tool to refer to supporting documentation which applies to more than one competency category.
- ✓ We recommend a maximum of five pages of evidence for each skills areas/competency level.
- ✓ To keep your submission manageable and within the page limitations, you may want to provide a summary list with a brief point form description of work-related reports and projects that support your claim instead of including full documents. The Council will request more detail as necessary.
- ✓ Providing evidence for education or professional development can be more concrete. For example, course descriptions, transcripts and program outlines can be useful as evidence.
- ✓ Providing evidence of professional experience will require additional details to demonstrate your competence such as report summaries, job descriptions, a summary of special projects, letters of reference and performance appraisals.

Competency Self-Assessment and Evidence Grid

Overview

Complete the competency self-assessment and evidence grid and combine it with your complete portfolio submission.

IMPORTANT:

- **Rating:** Choose “0” if you do not have experience in a particular area and 5 if you are an expert.
- The sub-skills/sub-competencies (e.g. 1.1 Assess organizational readiness) are provided for your information about each competency so that you can understand scope of assessment. **Please provide evidence at the skill areas/competency level only (e.g. 1. Conduct situational analysis).**
- As mentioned in the CITP Competency Profile, only 15 of the 18 categories, 26 of the 40 skill areas and 78 of the 140 subskills represented in the *FITT International Trade Competency Framework* have been identified as required in the *CITP Competency Profile*. Therefore, the numbers used to identify categories, skill areas, subskills, performance and knowledge pieces will not flow in a sequential order as this document only reflects the ones represented in the CITP Profile.

Competency Category 1: FEASIBILITY OF INTERNATIONAL TRADE		
	Step A: Self-Assessment: Enter your rating on a scale of 0-5	Step B: List Supporting Evidence
1. Conduct situational analysis		
1.1 Assess organizational readiness		
1.2 Determine potential target markets		

1.3	Conduct market research		
1.4	Access programs and services		
1.5	Determine product eligibility for import/export		
1.6	Determine services eligibility for import/export		
2.	Conduct cost analysis		
2.1	Conduct cost analysis for importing products		
2.2	Conduct cost analysis for exporting products		
2.3	Conduct cost analysis for outsourcing services internationally		
2.4	Conduct cost analysis for exporting services		
3.	Analyze risk		
3.1	Analyze commercial risk		
3.2	Analyze currency risk		
3.3	Analyze economic risk		
3.4	Analyze foreign physical asset risk		
3.5	Analyze personnel risk		
3.6	Analyze political risk		
3.7	Analyze social risk		
3.8	Analyze technology risk		
3.9	Analyze intellectual property risk		
3.10	Analyze supply chain disruption risk		

Competency Category 2: MARKET EXPANSION PLANNING

	Step A: Self-Assessment: Enter your rating on a scale of 0-5	Step B: List Supporting Evidence
4. Mitigate risk		
4.1 Manage commercial risk		
4.2 Manage currency risk		
4.3 Manage economic risk		
4.4 Manage foreign physical asset risk		
4.6 Manage political risk		
4.8 Manage technology risk		
4.9 Manage intellectual property risk		
5. Develop plans		
5.1 Consult with financial institutions about international opportunities and requirements		
5.2 Develop international business plan		
5.3 Develop international sales and marketing plan		
5.4 Develop strategic market entry plan		

Competency Category 3: MARKET ENTRY STRATEGIES

	Step A: Self-Assessment: Enter your rating on a scale of 0-5	Step B: List Supporting Evidence
6. Manage direct exports		
6.1 Manage direct exports		
7. Manage indirect exports		
7.1 Manage indirect exports		
8. Develop strategic alliances		
8.1 Research strategic alliance opportunities		
8.2 Evaluate potential partners		
8.3 Negotiate contracts for strategic alliances		
8.4 Manage existing strategic alliances		

Competency Category 4: FINANCE

	Step A: Self-Assessment: Enter your rating on a scale of 0-5	Step B: List Supporting Evidence
11. Conduct trade transaction		
11.1 Negotiate payment options		
11.2 Obtaining international trade financing		
11.3 Procure credit insurance		
11.4 Procure guarantees		
11.5 Procure bonds		
11.6 Meet conditions of payment options		
13. Manage payment defaults		
13.2 Pursue collection		

Competency Category 5: BUSINESS DISPUTES

	Step A: Self-Assessment: Enter your rating on a scale of 0-5	Step B: List Supporting Evidence
14. Resolve business disputes		
14.1 Resolve trade discrepancies		

Competency Category 6: PROCUREMENT

	Step A: Self-Assessment: Enter your rating on a scale of 0-5	Step B: List Supporting Evidence
15. Purchase goods		
15.1 Procure goods from foreign organizations		
16. Purchase services		
16.1 Procure services from foreign organizations		

Competency Category 7: PRODUCT/SERVICE PRODUCTION

	Step A: Self-Assessment: Enter your rating on a scale of 0-5	Step B: List Supporting Evidence
18. Manufacture product		
18.1 Conduct market research to inform manufacturing of product		
18.2 Customize product for client		
18.4 Confirm product meets market requirements		
18.5 Package and label product		
19. Develop services		
19.1 Develop service offerings		

Competency Category 8: INVENTORY MANAGEMENT

	Step A: Self-Assessment: Enter your rating on a scale of 0-5	Step B: List Supporting Evidence
21. Manage inventory		
21.1 Establish inventory system		
21.2 Maintain inventory levels		

Competency Category 9: DISTRIBUTION

	Step A: Self-Assessment: Enter your rating on a scale of 0-5	Step B: List Supporting Evidence
22. Transport goods		
22.1 Determine transportation requirements		
22.2 Arrange for carrier(s)		
22.4 Prepare goods for shipping		
22.7 Follow customs protocols		
23. Deliver services		
23.1 Provide services		

Competency Category 11: DOCUMENT MANAGEMENT

	Step A: Self-Assessment: Enter your rating on a scale of 0-5	Step B: List Supporting Evidence
27. Manage control documents		
27.1 Manage supply documents for exporting		
27.2 Manage supply documents for importing		

Competency Category 12: SALES AND MARKETING

	Step A: Self-Assessment: Enter your rating on a scale of 0-5	Step B: List Supporting Evidence
28. Market products and services		
28.1 Adapt products and services for the international market		
28.2 Develop an international brand		
28.3 Develop an international competitive strategy		
28.4 Promote products and services		
29. Sell products and services		
29.1 Establish sales channels		
29.2 Develop a pricing strategy		
29.3 Sell products and services		

29.4 Negotiate terms of sales agreement for goods	
29.6 Conduct sales follow-up	

Competency Category 14: INTERCULTURAL COMPETENCE

	Step A: Self-Assessment: Enter your rating on a scale of 0-5	Step B: List Supporting Evidence
32. Build relationships with other cultures		
32.1 Research other culture(s)		
32.2 Develop cross-cultural relationships		

Competency Category 15: LAW & ETHICS

	Step A: Self-Assessment: Enter your rating on a scale of 0-5	Step B: List Supporting Evidence
35. Comply with legal requirements		
35.2 Follow policies and procedures to meet legal requirements		
36. Exhibit business ethics		
36.1 Establish code of ethics/conduct		
36.2 Implement code of ethics/conduct		
36.3 Follow code of ethics/conduct		

Competency Category 16: RESILIENCY

	Step A: Self-Assessment: Enter your rating on a scale of 0-5	Step B: List Supporting Evidence
37. Develop organizational resiliency		
37.6 Develop strategic relationships		

Competency Category 18: COMMUNICATE EFFECTIVELY

	Step A: Self-Assessment: Enter your rating on a scale of 0-5	Step B: List Supporting Evidence
40. Communicate effectively		
40.1 Maintain geographically distant business relationships		