



CPE EXPLAINED

MAY 9, 2023



TODAY'S PRESENTERS



Jody Leon
Learning Specialist, NCMA



KwaNitria "NeeNee" Denny
Certification Specialist, NCMA



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Director, Certification and Standard, NCMA

AGENDA

- What is a CPE? What's the Purpose of CPE?
- CPE Guide Overview
- Breaking News: CPE Changes
- Three Keys to CPE Success
- Acceptable & Unacceptable CPE Programs
- The Process: Submitting CPEs for new Certifications & Recertifications
- Ways to Earn CPEs

WHAT IS A CPE?

- CPE = Continuing Professional Education
- CPE is meaningful professional development.

1.4 Participation

Successful contract managers participate in learning activities that maintain or improve individual competence. Selection of learning activities should be a thoughtful, reflective process addressing the individual contract manager's current and future professional plans, current knowledge, and skill level, and desired or needed additional competence to meet future opportunities or professional responsibilities, or both. Accordingly, acceptable continuing education encompasses programs contributing to the development and maintenance of professional skills.

WHAT IS A CPE?

- You are in the driver's seat to determine what is meaningful.
- Use Professional judgement

2.2 Professional Judgment in Determining CPE

The certification candidate is responsible for ensuring that a topic or subject qualifies as acceptable CPE. For instance, there are CPE programs that include a wide variety of topics and subjects that may contribute to maintaining or enhancing the professional competence of some learners, but not others.

Determining what topics and subjects are appropriate for individuals to satisfy the CPE requirement is a matter of professional judgment. Among the considerations in exercising that judgment are the individual's experience, the contract management area(s) in which he or she works, and the responsibilities he or she assumes in performing contract management functions.

CPE GUIDE OVERVIEW



CPE Explained



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BREAKING NEWS: CPE CHANGES

- The Audit Approach for CPE:
- Applicants must still maintain supporting documentation which complies to the CPE Guide. BUT
- Supporting documentation is not required to be submitted with a certification or recertification application.
- All applications for certification and recertification are subject to audit, though only a percentage of applications will be audited.
- Applicants selected for audit must submit CPE documentation which meets the documentation requirements as specified in section 7.2, Maintaining Documentation, of the CPE Guide, before their application will be approved.
- Change will be effective May 15, 2023

BREAKING NEWS: CPE CHANGES

- Updated CPE Guide, effective May 15, 2023.
 - Section 7.1 Audit Process
 - Section 7.2 Maintaining Documentation clarifies that supporting documentation should include:
 - Provider organization.
 - Title of the program or a brief description of its contents.
 - Dates of the course.
 - Duration of the event or number of CPE earned.
 - Documentation of attendance or completion.
 - Section 7.2 adds examples of different types of documentation which could meet these requirements
 - When all else fails...

BREAKING NEWS: CPE CHANGES

Appendix Two: CPE Supplemental Supporting Documentation

Provider	Title/ Description	<u>Date(s)</u> <u>Attended</u>	Duration (in hours)	CPE Earned	Attestation of Completion
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- Appendix two CPE Supplemental Documentation may be used to document CPE.

I hereby affirm that all statements and information set forth herein are true and correct. I understand that any falsification, willful misrepresentation, or omission intending to mislead NCMA may forfeit my rights to certification. I have read and understand the contents and professional implications of the NCMA Code of Ethics and the NCMA Certification Policies and Procedures Agreement.

Name: _____

Signature: _____

Date: _____

THREE KEYS TO CPE SUCCESS: QUALIFYING, TIMING, DOCUMENTATION

- Three Keys to CPE:
 - Qualifying: aligns with CMBOK Competencies
 - Section 2.3 and Appendix One of [CPE Guide](#)
 - Timing:
 - New Application for Certification: 10 years from date of application for certification
 - Recertification Application: within the designated recertification period (outlined in each Certification handbook)
 - Section 2.0 Categories of CPEs
 - Documentation
 - Section 7.0 of [CPE Guide](#) outlines supporting documentation requirements.



THREE KEYS TO CPE SUCCESS: #1 QUALIFYING

CMBOK 7 TH Edition Competencies						
A. Leadership	B. Management	1.0 Guiding Principles	2.0 Pre-Award	3.0 Award	4.0 Post-Award	C. Learn
A.1 Competence	B.1 Business Management	1.1 Skills and Roles	2.1 Plan Solicitation	3.1 Price or Cost Analysis	4.1 Administer Contract	C.1 Continuous Learning
A.2 Character	B.2 Change Management	1.2 Contract Principles	2.2 Request Offers	3.2 Plan Negotiations	4.2 Ensure Quality	C.2 Individual Competence
A.3 Collaboration	B.3 Financial Management	1.3 Standards of Conduct	2.3 Plan Sales	3.3 Select Source	4.3 Manage Subcontracts	C.3 Organiza-tional Capability
A.4 Emotional Intelligence	B.4 Project Management	1.4 Regulatory Compliance	2.4 Prepare Offer	3.4 Manage Disagreements	4.4 Manage Changes	
A.5 Vision	B.5 Risk Management	1.5 Situational Assessment			4.5 Close Out Contract	
	B.6 Supply Chain Management	1.6 Team Dynamics				
		1.7 Communication and Documentation				

THREE KEYS TO CPE SUCCESS: #2 TIMING

- Timing:

- New Application for Certification: 10 years from date of application for certification
- Recertification Application: within the designated recertification period (outlined in each Certification handbook)
 - Section 2.0 Categories of CPEs



THREE KEYS TO CPE SUCCESS: #3 DOCUMENTATION

- Documentation needs to demonstrate:
 - Provider Organization: Who gave the training?
 - Title of the program or a brief description of its contents: What was the training?
 - Dates of the course: When did you take the training?
 - Duration of the event or number of CPEs earned.
 - See CPE Guide Section 4.0 Measuring CPE
 - Documentation of attendance or completion.
- Converting Hours awarded in a measurement other than CPE:
 - 1 CEU = 10 CPE
 - 1 CPU = 10 CPE
 - 1 CLE = 1 CPE
 - 1 CLP = 1 CPE
 - 1 PDU = 1 CPE
 - University or college courses:
 - 1 Semester Hour = 15 CPE
 - 1 Quarter Hour = 10 CPE

THREE KEYS TO CPE SUCCESS: #3 DOCUMENTATION

- Examples of how to document the requirements: Get creative!
 - Record of the grade received from a university or college course;
 - Record of attendance: meeting invite, screenshot of the course completion, certificate, email from the course sponsor of the completion, etc.
 - Certificate of completion.
 - Email of completion from the program sponsor.
 - Copy of the published article, book, or training course.
 - Copy of the agenda, course advertisement, or a printout of the course description.
- If adequate documentation is not available in any other form, CPE Supplemental Documentation, Appendix Two of the CPE Guide, may be used.

Appendix Two: CPE Supplemental Supporting Documentation

Provider	Title/ Description	Date(s) <u>Attended</u>	Duration (in hours)	CPE Earned	Attestation of Completion
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I hereby affirm that all statements and information set forth herein are true and correct. I understand that any falsification, willful misrepresentation, or omission intending to mislead NCMA may forfeit my rights to certification. I have read and understand the contents and professional implications of the NCMA Code of Ethics and the NCMA Certification Policies and Procedures Agreement.

Name: _____

Signature: _____

Date: _____

DOCUMENTATION EXAMPLES

From: Association Academy
To: Brie Staker
Subject: Class Complete! Read Carefully--Final Certificate Information.
Date: Thursday, March 30, 2023 11:32:19 AM


Hello Brie,

Thanks to you and all the students that made this semester of the Association Membership Growth Certificate Course a big success! This final course email includes all your course records and resources, please read it carefully. It's been my pleasure to serve as your teacher and I wish you many years of success.

Sincerely,
Chris Gloede
Lead Instructor

YOUR CREDENTIALS

CAE Credits



CAE Credits

This email is confirmation that you earned 10 CAE credits for your attendance throughout the course. Please keep this email as your official confirmation. Please reply to this email if you have questions about CAE credits earned.

- Documentation needs to demonstrate:
 - Provider Organization:
 - Title of the program or a brief description of its contents
 - Dates of the course
 - Duration of the event or number of CPE Earned.
 - Documentation of evidence or completion.

DOCUMENTATION EXAMPLES

Brie Staker

Subject: Value Proposition of a Credential
Location: https://smithbucklin.zoom.us/j/96221452515?tk=Logj31tyqwHXgTP4_ti1jyP4QlViROFDIOQC6v_OA2E.DQMAAAWZz7Y4xZNamRQOW82b1NpR212RXFZbUFT1IRAAAAA&uuiid=WN_C9uOn6BcRGeoWn1_BiH1Ag

Start: Tue 3/7/2023 9:00 AM
End: Tue 3/7/2023 10:00 AM

Recurrence: (none)

Organizer: Brie Staker

ICE Webinar


Join from a PC, Mac, iPad, iPhone or Android device:
Please click this URL to join.
https://smithbucklin.zoom.us/j/96221452515?tk=Logj31tyqwHXgTP4_ti1jyP4QlViROFDIOQC6v_OA2E.DQMAAAWZz7Y4xZNamRQOW82b1NpR212RXFZbUFT1IRAAAAA&uuiid=WN_C9uOn6BcRGeoWn1_BiH1Ag

Or One tap mobile:
+12532158782,,96221452515# US (Tacoma)
+12532050468,,96221452515# US

Or join by phone:
Dial(for higher quality, dial a number based on your current location):
US: +1 253 215 8782 or +1 253 205 0468 or +1 669 444 9171 or +1 669 900 6833 or +1 719 359 4580 or +1 346 248 7799 or +1 689 278 1000 or +1 301 715 8592 or +1 305 224 1968 or +1 309 205 3325 or +1 312 626 6799 or +1 360 209 5623 or +1 386 347 5053 or +1 507 473 4847 or +1 564 217 2000 or +1 646 876 9923 or +1 646 931 3860
Webinar ID: 962 2145 2515
International numbers available: <https://smithbucklin.zoom.us/j/ad5gb8slDb>


- Documentation needs to demonstrate:
 - Provider Organization:
 - Title of the program or a brief description of its contents
 - Dates of the course
 - Duration of the event or number of CPE Earned.
 - Documentation of evidence or completion.

DOCUMENTATION EXAMPLES



September 2022 Virtual Meeting
Thursday, September 22, 2022
Noon – 1:00

Introverted Leader
Presented by Brie Staker CFCM



Brie Staker,
CFCM

Do you wonder how you can get ahead, develop as a leader, and achieve professional growth when you are an introvert in what can feel like an extrovert world? How can you effectively lead as a professional or obtain the promotion and advancement you would like when you're more the reserved, shy, and quiet type? Have you ever met someone who is bold, confident, and outgoing and are surprised to find out that while they may seem extroverted, they are really an introvert? These individuals have developed the skills they need to be successful leaders and have learned how to adapt and grow to be comfortable with continually developing and deploying strong leadership skills. When you're an introvert navigating through a career that often requires you to be bold, outspoken, and network often it can be difficult but it's not impossible! This presentation will provide attendees with first-hand guidance and tips from a life-long introvert. Attendees will leave the session with practical guidance, and takeaways that they can put to work in their careers to help them develop and advance as professionals and leaders.

Brie Staker has over 18 years of contracting experience in the defense industry. She began her career in business development and proposal writing and then moved into contracting and subcontracting. She is currently working as Director of Certification and Standards for the National Contract Management Association (NCMA). Prior to that, she was Director of Contracts for the Ordnance Systems Platforms and Services Sector of BAE Systems. She is a regular speaker at NCMA conferences, a NCMA Fellow, and a graduate of NCMA's Contract Management Leadership Development Program (CMLDP). She is also a published author in NCMA's Contract Management magazine.

RSVP to
Gordon Mason, gmason@srcinc.com By COB Tuesday
September 20th

Sponsored by the Leatherstocking Chapter

- Documentation needs to demonstrate:
 - Provider Organization:
 - Title of the program or a brief description of its contents
 - Dates of the course
 - Duration of the event or number of CPE Earned.
 - Documentation of attendance or completion.

ACCEPTABLE CPE: EXAMPLES

- Chapter Training Events
- Company provided training: educational and aligns with CMBOK Competencies
- Online courses and webinars
- College and university courses
 - These cannot be counted as CPE *and* used to meet the education eligibility requirements for a certification application (i.e. no double dipping)
- Developing and presenting training as a speaker or instructor
- Publishing articles or books
- Serving on a magazine or journal review board
- Serving as a mentor in a formal mentoring program
- Serving as an item writer for certification examinations



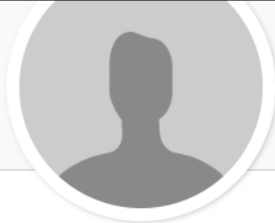
*Timing
Qualifying
Documentation*

UNACCEPTABLE CPE

- Informal job training
 - New Hire Orientation;
 - Company policies, processes;
 - How to use company software, etc.
 - How to submit timecards
- Courses not designed to maintain or enhance contract knowledge
 - How to use Microsoft Excel
- Sales-oriented programs
 - Software demos
 - Printer demos
- Participation as a member of a committee or a professional organization

HOW TO SUBMIT CPES

1. In your NMCAHQ profile, Navigate to *Continuing Education*



NAME

NCMA

ID 996531

Member since 5/23/2022

Type Complimentary Member

Status Active

Paid through 5/31/2023

About

Changes & Notes

Participation

Volunteer Leadership

Membership

Communities of Practice

Commitees

Purchase History

Continuing Education

Certification Applications

Earned Certifications

Record your Continuing Education hours below. Click the + icon to add a new course.

Self-Reported Continuing Education

Date

Earned

▲

Course

Description

Hours

Category

Provider

Competency

2ndCompetency

There are no records.

Total CPEs

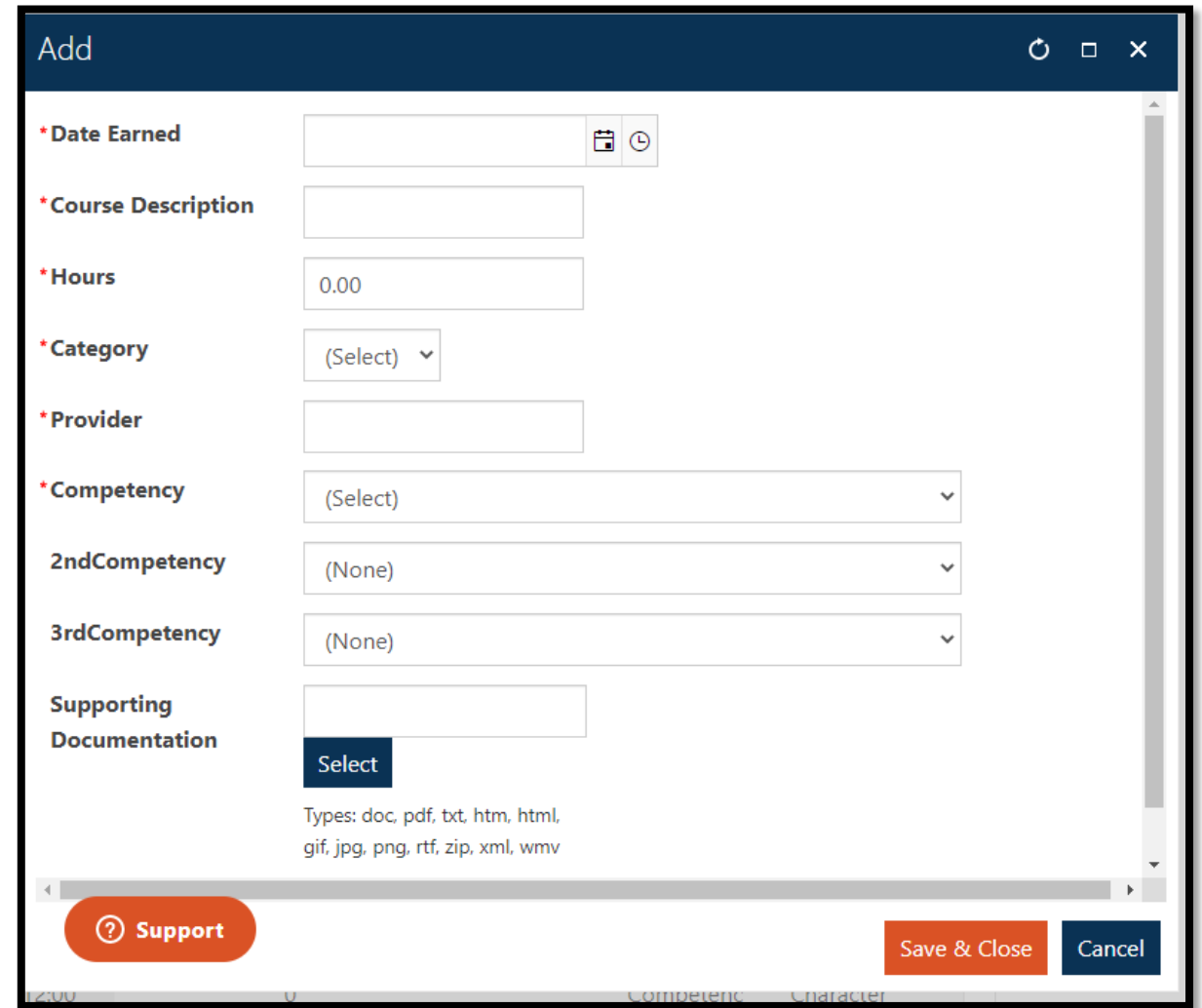
45.10

Continuing Education History

2. Click the + icon under Self-Reporting Continuing Education

HOW TO SUBMIT CPES

- Date Earned: Date the course was completed.
- Course Description: Title or description
- Hours: Duration of the course
- Category: CPE
- Provider: Course provider
- Competencies: Select at least one CMBOK Competency, additional up to three may be selected
- Supporting Documentation: **NOT REQUIRED**
Starting May 15, 2023, uploading supporting documentation is optional.
- Save & Close



The screenshot shows a web form titled "Add" with a dark blue header bar containing a refresh icon, a maximize icon, and a close icon. The form fields are as follows:

- *Date Earned**: A text input field with a calendar icon and a clock icon to its right.
- *Course Description**: A text input field.
- *Hours**: A text input field containing "0.00".
- *Category**: A dropdown menu showing "(Select)".
- *Provider**: A text input field.
- *Competency**: A dropdown menu showing "(Select)".
- 2ndCompetency**: A dropdown menu showing "(None)".
- 3rdCompetency**: A dropdown menu showing "(None)".
- Supporting Documentation**: A text input field with a "Select" button below it. Below the button, it lists supported file types: "Types: doc, pdf, txt, html, html, gif, jpg, png, rtf, zip, xml, wmv".

At the bottom of the form, there is a horizontal bar with a "Support" button (with a question mark icon) on the left, and "Save & Close" and "Cancel" buttons on the right.

HOW TO EARN CPE WITH NCMA

- Events: Conferences / Symposiums
- Learning Catalog
 - Online Preparatory Courses
 - Certificate Courses
 - Live and Self-Paced Virtual Trainings
 - Free to Member Virtual Trainings
 - Chapter Events

EVENT – WORLD CONGRESS 2023



***Register by 5/31
to take advantage of the
EARLY BIRD DISCOUNT!***

In Person

Member: \$1,255

Non-Member: \$1,140

Virtual

Member: \$855

Non-Member: \$1,040

Register Today!

ncmahq.org/worldcongress

EVENT – WORLD CONGRESS 2023 – ADDITIONAL TRAINING

Sunday, July 23rd 9:00 am - 4:30 pm CT

All-Day Training Option #1:

Evaluating and Negotiating Contractual Risk: The “Yellowstone” Way

All-Day Training Option #2:

Leadership Strategies for Contracting Professionals

- Cost: \$365 Members / \$399 Non-members
- Credits Earned: 6 CPE
- Lunch Included

Register Today!

ncmahq.org/worldcongress



EVENT – WORLD CONGRESS 2023 – ADDITIONAL TRAINING

Wednesday, July 26th 1:00 pm – 4:00 pm CT

Half-Day Training Option #1:

Comprehensive Cost Proposals for Buyers and Sellers

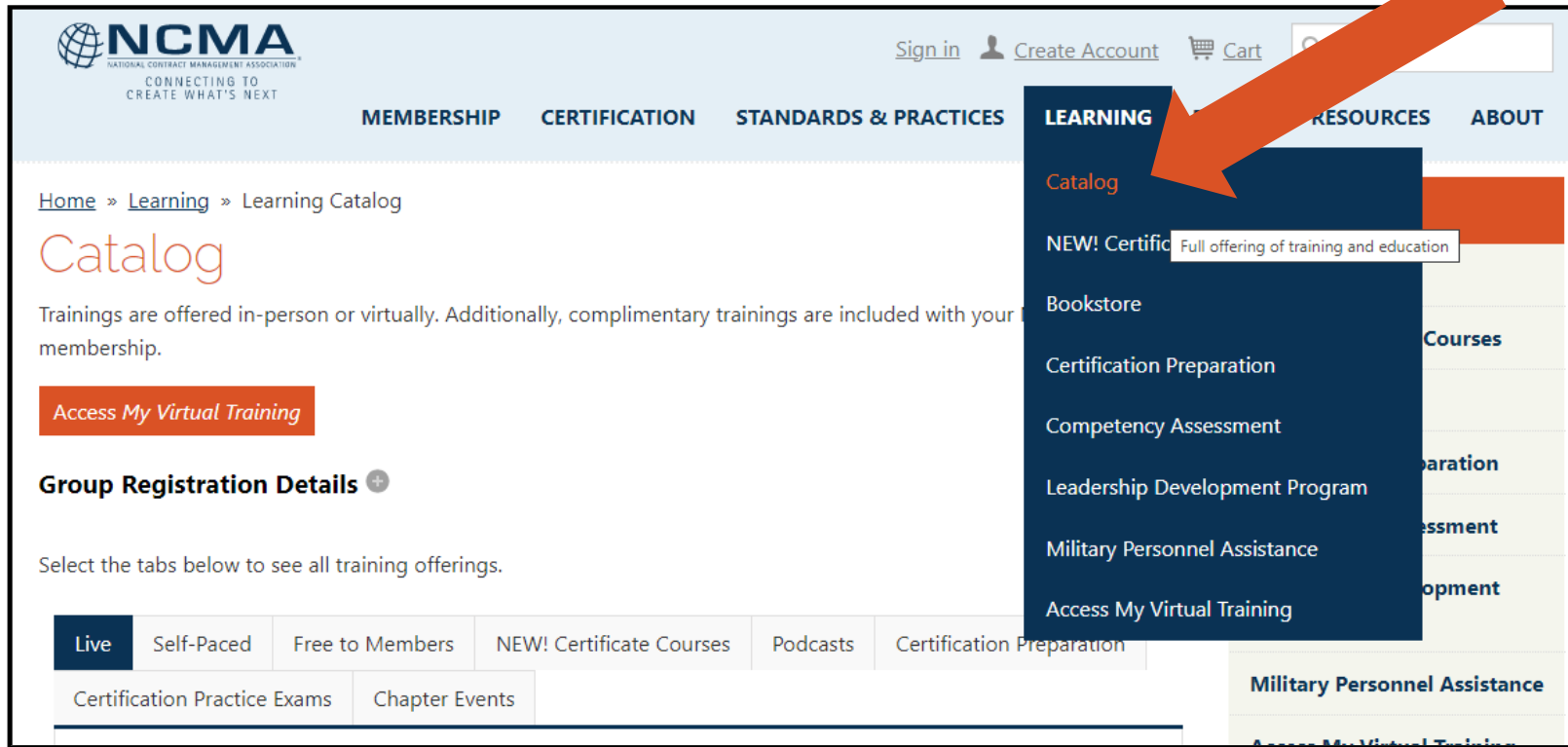
- Cost: \$210 Members / \$242 Non-members
- Credits Earned: 3 CPE
- Lunch Included

Register Today!

ncmahq.org/worldcongress



LEARNING CATALOG



Visit our Learning Catalog at ncmahq.org/catalog to see all the virtual trainings NCMA offers.

CERTIFICATION ONLINE PREPARATORY COURSE (OPC)

Prepare for your CCMA Exam!

- Fully self-paced structure - learn on your own schedule
- Earn 5 CPE/CLP hours
- Access anytime, on any device
- 90-question practice exam included

Learn More at ncmahq.org/opc

CERTIFICATION ONLINE PREPARATORY COURSE (OPC)

Get Help for your CPCM™ and CFCM™ Exams!

- 10 short weeks! Summer Session Starts June 26th, 2023
- Asynchronous learning, lectures are pre-recorded
- Access anytime, on any device
- Collaborate with your instructor and classmates
- Earn 40 CPE/CLP hours - Use the CPE/CLP hours earned towards exam eligibility

Learn More at ncmahq.org/opc

UPCOMING TRAININGS

Cost and Pricing Fundamentals

Gain a valuable, high-level overview of the unique complexities of developing price proposals in the U.S. Federal contracting market. Learn the basics of cost principles, fair and reasonable pricing, cost and pricing data, cost and price analysis, related regulatory requirements and more.

- Live Virtual Training takes place over four consecutive days for **2.5 hours each day**.
- Digital Badge for LinkedIn Profile
- Earn 10 CPE/CLP

Summer Course: June 12 – June 15, 2023

from 2:00pm – 4:30pm ET



UPCOMING TRAININGS

The Contract Life Cycle - Summer 2023

In this interactive seminar, participants will try their hands at specific job tasks required of contract managers throughout the contract life cycle: pre-award, award, and post-award. Expert practitioners will lead participants as they explore specific examples and case studies at each stage.

- Live Virtual Training takes place two days for 3.5 hours each day.
- Earn 7 CPE/CLP

Summer: August 22nd & 28th
from 1:30pm – 5:00pm ET

UPCOMING TRAININGS

- **May 11:** Inflation: Economic Price Adjustments and Extraordinary Contractual Relief (FREE TO MEMBERS)
- **May 25:** Tracking Performance with a Vendor Scorecard
- **June 1:** Being a Better Business Partner: Insights from Former Contracting Officers (Free to All)
- **June 8:** CMMC Update: Preparing for Implementation
- **June 22:** FAR/DFARS Mid-Year Update 2023
- **July 13:** Contract Types: Impact and Risk Allocation

Visit our Learning Catalog at ncmahq.org/catalog to see all the virtual trainings NCMA offers.

LEARNING CATALOG – LIVE AND SELF-PACED

Select the tabs below to see all training offerings.

Live **Self-Paced** Free to Members NEW! Certificate Courses Podcasts Certification Preparation

Certification Practice Exams Chapter Events

Self-Paced

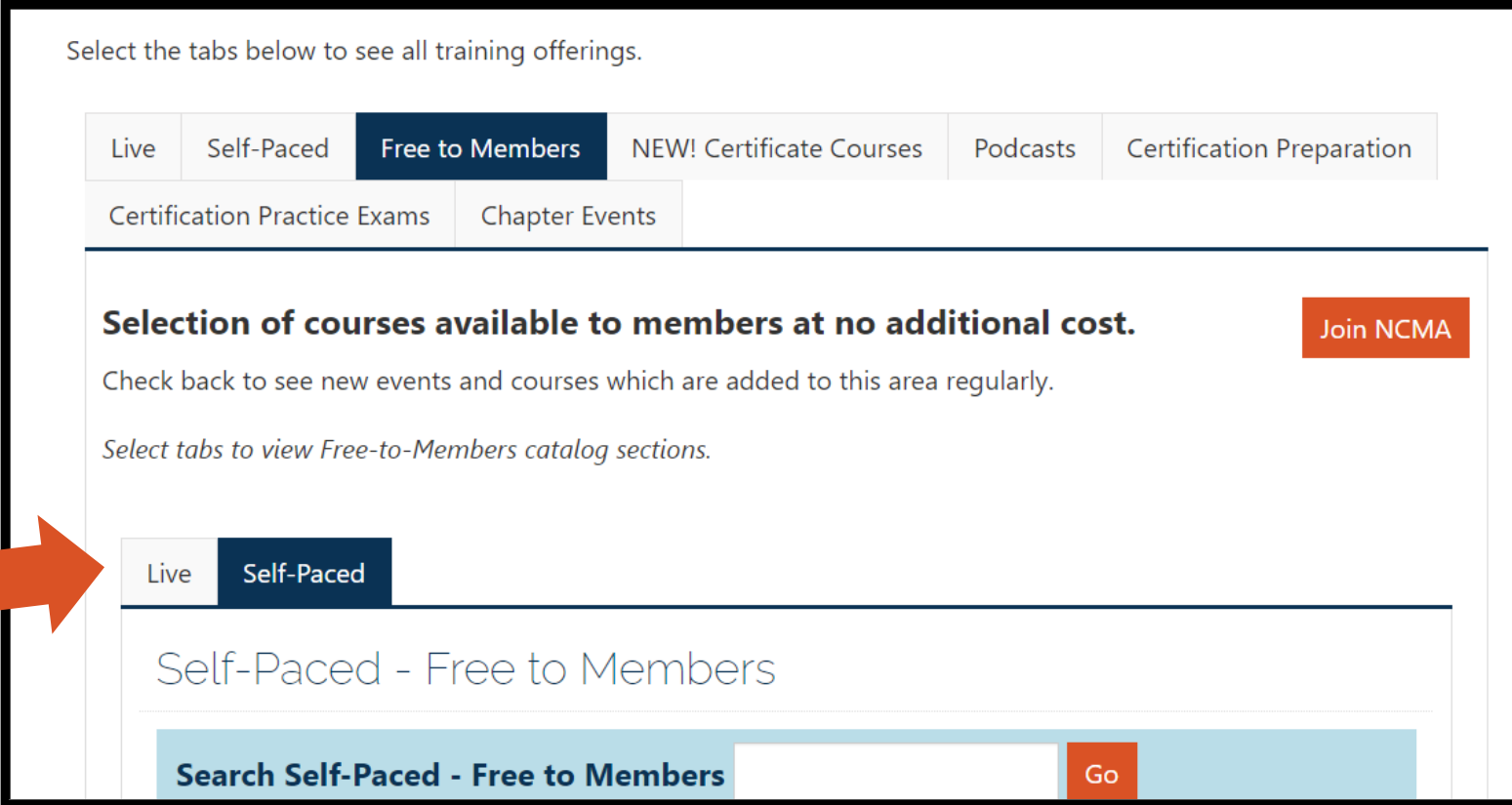
Search Self-Paced Go

1 2 3 4 5 6 7 Page size: 25 152 items in 7 pages

[Show all 152](#)

Visit our Learning Catalog at ncmahq.org/catalog to see all the virtual trainings NCMA offers.

LEARNING CATALOG – FREE TO MEMBERS



Select the tabs below to see all training offerings.

Live Self-Paced **Free to Members** NEW! Certificate Courses Podcasts Certification Preparation

Certification Practice Exams Chapter Events

Selection of courses available to members at no additional cost. [Join NCMA](#)

Check back to see new events and courses which are added to this area regularly.

Select tabs to view Free-to-Members catalog sections.

Live **Self-Paced**

Self-Paced - Free to Members

Search Self-Paced - Free to Members [Go](#)

An orange arrow points to the 'Self-Paced' tab in the second set of filters.

Visit our Learning Catalog at ncmahq.org/catalog to see all the virtual trainings NCMA offers.


LEARNING CATALOG – CHAPTER EVENTS

Select the tabs below to see all training offerings.

Live	Self-Paced	Free to Members	NEW! Certificate Courses	Podcasts	Certification Preparation
Certification Practice Exams	Chapter Events				

Chapter Events Calendar

Check back often as events are posted regularly.



Visit our Learning Catalog at ncmahq.org/catalog to see all the virtual trainings NCMA offers.

RESOURCES AND Q&A

- NCMA Certifications ncmahq.org/certification
- Certification Handbooks
 - CPCM ncmahq.org/cpcm
 - CFCM ncmahq.org/cfcm
 - CCCM ncmahq.org/cccm
 - CCMA ncmahq.org/ccma
- The CPE Guide ncmahq.org/cpe
- Online Preparatory Courses (OPC) ncmahq.org/opc
- Learning Catalog ncmahq.org/catalog

- Jody Leon, Learning Specialist
 - memberservices@ncmahq.org

- Brie Staker, Director of Certification & Standards
- KwaNitria Denny, Certification Specialist
 - certification@ncmahq.org



ASK YOUR QUESTIONS LIVE



Feel free to email memberservices@ncmahq.org with additional questions!