

# CONTRACT MANAGEMENT

*Continuing Professional Education Guide*



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# CONTRACT MANAGEMENT CONTINUING PROFESSIONAL EDUCATION GUIDE



## 1.0 STATEMENT OF CONTRACT MANAGEMENT CONTINUING PROFESSIONAL EDUCATION

### 1.1 Preamble

The National Contract Management Association (NCMA) was founded in 1959 and is the world's leading professional resource for those in the contract management profession. NCMA is dedicated to the professional growth and educational advancement of contract management professionals. In addition, NCMA strives to serve and inform the profession it represents and to offer opportunities for the open exchange of ideas in neutral forums. In this role, NCMA is the foremost standards development organization for contract management in the United States.

### 1.2 Scope

The scope of the *Contract Management Continuing Professional Education (CPE) Guide* is to establish a framework for the development, presentation, measurement, and reporting of continuing professional education (CPE) to ensure contract managers pursue and achieve the quality learning activities necessary to add value to their obligations and desires for growth in individual competence, which in turn leads to improved organizational capability.

### 1.3 Participation

All contract managers should 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 CPE encompasses programs contributing to the development and maintenance of professional skills.

## 2.0 CATEGORIES OF CPE

### 2.1 Qualifying CPE

Qualifying CPE for certification must be earned no later than 10 years from the date of application for certification.

### 2.2 Recertifying CPE

To keep certification(s) active, the certification holder must earn CPE within the designated certification period in approved contract management topics.

The certification holder has the responsibility to comply with the CPE requirements. Individuals are responsible for:

Seeking opportunities for CPE,

- Successfully completing CPE programs and activities,
- Maintaining documentation of the CPE hours completed for reporting to the board if requested, and
- Monitoring their own progress toward meeting the CPE requirements.

### 2.3 Expired CPE

CPE more than 10 years old are expired and are not considered for certification. This includes college and university courses being used for CPE, but not for a degree requirement. For instance, a degree earned over 10 years ago is valid when used to fulfill a degree requirement; however, any courses completed outside the degree and to be considered for CPE must be less than 10 years old. (Note: This policy does not diminish the completed college or university course(s), but it enhances the stature of CPE.)

## 3.0 ACCEPTABLE PROGRAMS AND ACTIVITIES

NCMA does not establish detailed criteria for CPE-qualifying programs and activities; however, it does require that CPE contribute to professional competence and growth. To determine if programs contribute to professional competence and to facilitate documentation, the following criteria may be used to determine whether programs are appropriate for consideration as CPE.

### 3.1 Group and Individual Self-Study Programs

Group and individual self-study programs include the following features:

- An agenda or outline is prepared in advance and retained by the program sponsor that indicates:
  - The name(s) of the instructor(s);
  - The subject(s)/topic(s) covered;
  - The date(s) and length of the program; and
  - When appropriate, the program's learning objectives and any prerequisites;
- The program is developed by individuals qualified in the topic/subject matter;
- Program materials are technically accurate, current, and sufficient to meet the program's learning objectives;
- The program is reviewed, when appropriate, by other qualified individuals (the nature and extent of such review may vary depending on characteristics of the program); and
- Evaluations of the program are obtained from instructors and participants, when appropriate.

### 3.2 Group Programs

"Group programs" are those where attendance records are maintained and the program is presented by a qualified instructor or discussion leader. The following are examples:

- Internal training programs (e.g., courses, seminars, and workshops);
- The portion of a contract management organization staff meeting in which a structured educational program is used to provide staff with knowledge regarding topics and subjects relevant to their contract management-related duties (Note: Informal discussions of current events in the contract management profession do not qualify as CPE);
- University and college courses (credit and noncredit); and/or
- Training programs presented by contract management training organizations, educational organizations, foundations, and professional associations at conferences, conventions, meetings, seminars, and workshops.

### 3.3 Individual Programs

"Individual programs" are those where participants are required to register for the program and the program sponsor provides evidence of satisfactory completion (e.g., a certificate of completion). The following are examples:

- Correspondence courses, self-study guides, and workbooks;
- Courses given through digital media and/or via the Internet; and/or
- Live, online/webinar events.

### 3.4 Other Professional Activities

"Other professional activities" include the following examples:

- Serving as a speaker, instructor, or discussion leader at group programs;
- Serving as an appointed reviewer of abstracts for breakout sessions in conferences, symposia, etc.
- Publishing articles and/or books, or developing CPE courses on topics and subjects that qualify for CPE hours and that contribute directly to the author's professional competence;
- Serving on a magazine or journal editorial review board; and/or
- Serving as a mentor or learner in a formal mentoring program (Note: An appointment document must be provided).

## 4.0 ACCEPTABLE TOPICS AND SUBJECTS

### 4.1 Certification and Recertification Requirements

CPE that would satisfy certification and recertification requirements must cover topics or otherwise be related to the competencies identified in the *Contract Management Body of Knowledge (CMBOK)*. Please refer to the appendix on page 63 for the outline of *CMBOK* competencies.

### 4.2 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 CPE requirements for certification 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.

## 5.0 UNACCEPTABLE TOPICS AND SUBJECTS

Examples of programs/activities or topics/subjects that do not qualify as acceptable CPE include, but are not limited to, the following:

- Informal on-the-job training;
- Basic or elementary courses in topics and subjects in which the candidate already has the necessary knowledge and skills;
- Programs that are not designed to maintain or enhance contract managers' professional competence, but are designed for the general public (e.g., résumé writing, improving parent-child relations, personal investments, money management, and retirement planning);

- Sales-oriented programs that demonstrate office equipment or software programs;
- Programs restricted to an organization's administrative operations (e.g., how to prepare time and attendance reports or internal administrative reporting responsibilities);
- Business or governance sessions at conferences, conventions, or meetings;
- Participation as a member of a committee of a professional organization; and
- Preparation and presentation time for repeated presentations.

## 6.0 MEASURING CPE HOURS

A CPE "hour" may be granted for each 50 minutes of participation in programs and activities that qualify. At conferences and other major events, where individual presentations are less than and/or more than 50 minutes, the sum of the presentations should be considered as one total program. For example, two 90-minute, two 50-minute, and three 40-minute presentations equal 400 minutes, or eight CPE hours.

Sponsors of CPE programs should monitor their programs to accurately assign the appropriate number of hours. Learners should earn CPE hours only for the actual time they attend the program(s). Preparation time for students participating in a CPE-qualifying program is not counted as part of CPE hour accumulation.

### 6.1 College or University Non-academic Credit Courses

A "non-academic credit course" means a course from a college or university that:

- Is not regionally accredited, or
- Is regionally accredited, but is outside the academic degree requirements.

Learners taking or teaching college or university non-academic credit courses should receive CPE hours based on the guidance previously mentioned. For learners completing college or university academic credit courses, the following conversions apply:

- Each semester hour credit equals 15 CPE hours, and

- Each quarter-hour credit equals 10 CPE hours.

Instructors for college or university academic credit courses should receive CPE hours based on the number of credit hours the college or university gives a student for successfully completing the course (e.g., a three-semester-hour credit course  $\times$  15 CPE hours per semester hour = 45 CPE hours).

For subsequent teaching of the same course, the following apply:

- For courses that are not updated, no additional CPE is earned; and
- For courses that are updated, CPE is earned by the person performing the updates and/or instructing.

(However, for courses that are updated, the cumulative CPE earned may not exceed 15 CPE hours for a semester-hour course or 10 CPE hours for a quarter-hour course. To receive CPE-hour credit, an overview of the update(s) and the number of CPE hours earned must be provided.)

## 6.2 SELF-PACED STUDY PROGRAMS

Participants in self-paced study programs should be granted CPE when they satisfactorily complete the programs. Generally, these programs should be pre-tested by the provider or sponsor to determine the average completion time, and CPE hours should be granted in an amount equal to the average completion time. (For example, a correspondence course that takes an average of 600 minutes to complete should be granted 10 CPE hours.)

Speakers, instructors (i.e., of university/college non-academic credit courses), and discussion leaders at programs that qualify for CPE should receive CPE hours for preparation and presentation time to the extent the topic or subject matter contributes directly to their professional competence. One hour of CPE should be granted for each 50 minutes of presentation time, and up to two additional hours of CPE may be granted for advance preparation for each 50 minutes of the presentation. (For example, a discussion leader could receive up to 21 hours of CPE for a presentation of 350 minutes (seven hours for presentation and 14 hours for preparation). However, for repeated presentations, an individual should not receive CPE hours for either preparation or presentation time, unless the topic or subject matter involved was changed significantly.)



### 6.3 Publications

Articles, books, or CPE courses written by learners on topics and subjects related to their expertise and/or work that contribute directly to professional competence will qualify for CPE in the year they are published. One hour of CPE may be granted for each hour devoted to writing articles, books, or course materials that are published.

## 7.0 QUALIFIED INSTRUCTORS

Instructors must be qualified with respect to both program content and instructional methods used. This requires due diligence on the part of the providers, sponsors, and/or learners to ensure the instructors have adequate education, training, and experience in creating, updating, and delivering all activities that earn CPE.

### 7.1 Qualifications of Instructors

Instructors are key ingredients in the learning process for any learning activity. Therefore, it is imperative that due diligence is exercised in selecting qualified instructors for all CPE-granting activities.

Qualified instructors are those who are capable—through training, education, or experience—of communicating effectively and providing an environment conducive to learning. They must:

- Be competent and current in the subject matter,
- Be skilled in the use of the appropriate instructional methods and technology,
- Be prepared in advance, and
- Strive to engage participants.

It is crucial that the instructor convey knowledge in such a manner that learners can convert the knowledge to increased competence.

### 7.2 Evaluation of Instructor's Performance

The instructor's performance should be evaluated at the conclusion of each program or session to determine the instructor's suitability to serve in the future.

## 8.0 EVALUATING LEARNING

An effective means for evaluating learning activity must be employed to measure quality with respect to content and presentation, as well as to provide a mechanism for participants to assess whether learning objectives were met. While it may not be reasonable to perform a formal evaluation in all learning events (e.g., events less than one hour), providing feedback in some manner is encouraged in all cases.

### 8.1 Required Elements of Evaluation

The objectives of evaluation are to assess participant and instructor satisfaction with specific programs and to increase subsequent program effectiveness. Evaluations, whether written or electronic, must be solicited from participants and instructors for each program session to determine such things as whether:

- Stated learning objectives were met;

- Stated prerequisite requirements were appropriate and sufficient;
- Program materials—including the qualified assessment, if any—were relevant and contributed to the achievement of the learning objectives;
- The time allotted to the learning activity was appropriate; and
- Individual instructors were effective.

If the instructor is actively involved in the development of the program materials, it is not necessary to solicit an evaluation from the instructor.

### 8.2 Evaluation Results

CPE program sponsors must periodically review evaluation results to assess program effectiveness and should inform developers and instructors of evaluation results.

## 9.0 MAINTAINING DOCUMENTATION

Learners are required to maintain records of CPE earned and provide supporting documentation on CPE completed. Records should include the following information for each CPE-qualifying program or activity attended or completed:

- Sponsoring organization;
- Location at which the program was given;
- Title of the program and a brief description of its contents, to include the relevant *CMBOK* competency/competencies (please refer to the appendix on page 5);
- Dates attended for group programs or dates completed for individual study programs;
- The number of CPE hours earned and evidence of attendance or completion, which may include the following:
  - A record of the grade received for a college or university credit course;
  - An outline and evidence of attendance, or of having been the instructor or discussion leader from the program sponsor;
  - A certificate of completion or other evidence of completion from the program sponsor; and/or
  - A copy of the published book, article, or course.

## 10.0 PLANNING

Continuous, lifelong learning is the hallmark of success in contract management. The amount of time designated in the recertification period is intended to include adverse life events that may periodically interrupt the pursuit of CPE (e.g., ill health, family leave, military service, and/or foreign residency).

To be effective, the accomplishment of CPE must be a targeted, planned, and deliberate activity. Now is the time to sit with your supervisor and anyone else who has some level of control over your very valuable resources—specifically, your time and money. Waiting until the last minute may cause you to lose your hard-earned certification(s) and other professional opportunities.

### 10.1 Extensions and Appeals

The NCMA Certification Staff is comprised of the Chief Executive Officer and all other designated staff members to support the NCMA Certification Program. For NCMA recertification extensions, the Certification Staff may grant extensions for extreme, documented situations. The certification holder should fully describe the reason(s)

for requesting an extension and submit it to the Certification Staff for a determination. The reason(s) should indicate due diligence in attempting to accomplish CPE during the entire recertification period. In any such case, the decision of the Certification Staff shall be final.

## APPENDIX: OUTLINE OF CMBOK COMPETENCIES

