



IIBA®
Endorsed Education Provider (EEP™)
Program Handbook

January 2017

Table of Contents

Table of Contents	2
1.0 About this Handbook	3
2.3 Fair & Equitable Policy	3
3.0 About the Endorsed Education Provider Program	3
3.1 Benefits of Participation in the EEP Program.....	4
3.2 Types of Providers.....	5
3.2.1 Training Providers	5
3.3 Application Requirements.....	5
3.4 Types of products eligible for EEP Endorsement.....	6
3.5 Application Process	7
3.5.1 Initial Provider Application.....	7
3.5.2 Course Endorsement Application.....	8
3.6 Fees.....	9
Provider Fees	9
3.6.1 First Year Fees.....	9
3.6.2 Annual Fees (after first year).....	9
3.6.3 Course Endorsement Application Fee	10
3.6.4 Webinar Registration Submission Fee.....	10
4.0 My course information has changed. What do I do?	10
5.0 Overview of PD Hours and CDU	11
6.0 Audits.....	12
7.0 Annual Renewals.....	12
7.1 Provider Renewal Fee.....	12
7.2 Overdue Payments.....	12
7.3 Lapsed Members.....	13
8.0 Complaints.....	13
8.1 Complaints against Training Providers	13
9.0 Trademarks and Copyright.....	13
9.1 IIBA Standards and Guidelines	14
9.2 IIBA Logos.....	14
10. Web-based Resources	14

1.0 About this Handbook

This handbook is intended to help current and potential Endorsed Education Provider (EEP™) vendors understand the International Institute of Business Analysis (IIBA) EEP program policies, procedures, services, and benefits.

2.3 Fair & Equitable Policy

IIBA policies and procedures contribute to the development, oversight, evaluation, and maintenance of fair and equitable certification and assessment. IIBA complies with all applicable laws and regulations, including the Americans with Disabilities Act.

3.0 About the Endorsed Education Provider Program

Throughout their careers, business analysis practitioners need to continually develop their skills. As the professional association supporting the careers of BAs worldwide, one of the goals of IIBA is to ensure that its members have access to the professional development (PD) opportunities they require. While IIBA does offer various PD opportunities – such as webinars – it is important for IIBA to support education providers further serving the BA community.

The IIBA Endorsed Education Provider program has two main objectives:

- 1) Endorse education providers and their products (courses, publications, study tools, etc.) to enable to business analysis community to identify such providers and products that are aligned with the *Guide to the Business Analysis Body of Knowledge (BABOK® Guide)*.
- 2) Provide a licensing mechanism to such education providers to properly use IIBA intellectual property (IP) including trademarks and *BABOK® Guide* content.

All products endorsed under the EEP program must either be:

- Directly related to business analysis (as described by the *BABOK® Guide* Knowledge Areas)
- Support other activities performed by business analysis practitioners, such as courses instructing on the use of tools used by BAs.

By enrolling in/purchasing products endorsed under the EEP program, business analysis community members are assured that:

- The provider has been reviewed by IIBA and meets IIBA requirements for participating in the EEP program.
- EEP vendor products (courses, programs, webinars, publications, etc.) are

aligned to the *BABOK® Guide*.

- EEP vendors are properly licensed to use IIBA intellectual property, and are using up-to-date IIBA content.
- For formal training programs:
 - The training aligns to a common set of effective practices and standards for delivery of education programs.
 - There is an effective means of communication to provide updates to curriculum delivery, as well as an identified procedure to address student concerns.
 - The training provider has the capability to offer the proposed training courses in terms of organization, physical resources, and administration.
 - Presenters are appropriately qualified, are skilled in teaching, are familiar with the curriculum, keep up-to-date with changes to the curriculum, and have knowledge and experience in the subject area.
 - There is adequate coverage of the curriculum, with an appropriate mix of lectures, practical work, and revision appropriate to the level of the course.
 - Delivery of instruction is relevant and supports the curriculum.
 - Materials are kept up-to-date, in line with changes to the curriculum.

3.1 Benefits of Participation in the EEP Program

The IIBA EEP program provides the following benefits:

- EEP vendors have permission to publicize their organization as an IIBA Endorsed Education Provider and use the IIBA EEP logo in promotional material (subject to IIBA terms and conditions).
- EEP vendors and their endorsed courses and programs are included in the IIBA searchable database of training opportunities, available to the global business analysis community.
- EEP vendors can advertise the number of Professional Development (PD) hours and/or Continuing Development Units (CDU) for which each of their endorsed training opportunities qualifies. EEP vendors can promote their endorsed courses to students as being pre-qualified for PD hours (certification) and CDUs (recertification)
- EEP vendors receive two complimentary IIBA memberships.
- New EEP vendors are announced in the IIBA *BA Connection* newsletter.

- EEP vendors are granted a non-exclusive, non-transferable, non-assignable, and revocable license to use the elements from the most recent version of the *BABOK® Guide* in course materials for IIBA endorsed courses.
- EEP vendors receive a discount on the purchase of copies of the *BABOK® Guide* (in electronic or hard-bound copies)
- EEP vendors are granted a non-exclusive, limited license to use the Certified Business Analysis Professional™ (CBAP®), Certification of Capability in Business Analysis™ (CCBA®), Entry Certificate in Business Analysis™ (ECBA™) marks in support of both courses and publications.
- Providers receive a certificate identifying them as an IIBA Endorsed Education Provider.

3.2 Types of Providers

Under the EEP program, IIBA certifies different types of providers:

3.2.1 Training Providers

Training providers are organizations that offer students courses, programs, and/or webinars in topics related to business analysis and/or business analysts. Such providers can either be:

- Public training providers, which are organizations that provide training to the public.
- Internal/Corporate training providers, which are organizations that do not provide training to the public, such as an internal training department.

3.3 Application Requirements

To qualify for IIBA endorsement, education providers must satisfy the following criteria:

- provide evidence that they have an established methodology for selecting, and supporting development of professional staff
- have a policy for receiving and responding to student complaints or concerns
- agree to abide to the terms and conditions of the [IIBA® Corporate Identity and Trademark Policy](#)

If providing courses

- provide evidence that they have an established process for recording and addressing student evaluation feedback
- provide evidence that they have an established, formalized methodology to track student performance and evaluate knowledge transfer
- if audited, be able to provide access to up to four years of student records
- agree to all terms and conditions of becoming and maintaining status as an EEP vendor as outlined by the EEP agreement

For Public training providers that have been operating for less than one year:

- may be asked to provide additional evidence describing their experience in business, including their experience managing the day-to-day requirements of business administration

3.4 Types of products eligible for EEP Endorsement

Products and services offered by EEP vendors include:

- Courses
- Webinars
- Study guides and other publications
- Job aids

Important: approved vendors must show products are in alignment with the current version of the *BABOK® Guide*

Courses

A course can last anywhere from a minimum of one instruction hour up to forty instruction hours. A course may or may not be one unit of a greater curriculum of instruction (i.e. a “program”). A section, module, or component of a larger curriculum is considered to be a course if it is marketed/advertised as such within the larger curriculum.

Courses qualify for endorsement if:

- They are at least one (1) hour in length.
- At least 75% of the content and teaching time relates to the tasks, techniques, and/or underlying competencies as described in the *BABOK® Guide*, or instruct on the use of tools used by BAs.

- Upon assessment, it can be verified that there is a mechanism to confirm knowledge or skill transfer, such as a quiz.

If you offer a CBAP®, CCBA® or ECBA™ “prep course”, that course MUST be endorsed under the IIBA EEP program (refer to section 8.2 of this Handbook).

IMPORTANT: Each course must be submitted separately to be considered for endorsement. Only one title per submission will be reviewed for either a course or a program. Program endorsement does not constitute individual course endorsement and individual course endorsement does not constitute program endorsement.

EEP vendors offering courses must:

- Have a process for participant evaluation of course offerings and instructors (for instructor-led courses).
- Possess an internal process for evaluating instructor performance.
- Have a process for continuous course improvement.

3.5 Application Process

The application process to become an IIBA Endorsed Education Provider includes the following components:

- **Initial Provider Application**—used when an education provider initially applies to become an IIBA EEP vendor, regardless of the type of provider.
- **Course Endorsement Application**—used in each of the following scenarios:
 - To submit at least one course for endorsement at the time that a provider initially applies.

3.5.1 Initial Provider Application

[The Provider Application](#) gathers everything the EEP program assessors require to complete the review.

IMPORTANT: Information included in the application must be complete and sufficiently detailed to allow a comprehensive evaluation. Failure to include sufficient information may result in processing delays.

For new provider applicants, payment of the annual fee for the first year is required at the time of application. If the provider is not approved as an EEP vendor, the application fee, minus an administrative fee of \$250, will be refunded.

The application must include:

- Company business name and trade name (if applicable). If the applicant is not a company, the individual's full legal name is required.
- Point of contact for account information and billing information
- For companies, legal documentation which identifies their status, such as articles of incorporation or business license
- For training providers:
 - the applicant's course, revision, and improvement process
 - the applicant's processes for evaluating the training product
 - the applicant's process for evaluating student feedback
 - Application for endorsement of at least one course

Payment must be received before your application is reviewed and assessed. Once payment is received, your application will be reviewed within fifteen (15) business days.

If your application is approved, IIBA will send you the legal agreement. The agreement must be completed, signed, and returned before your EEP status becomes active.

Once your status becomes active, we will send you a Welcome Kit including:

- Certificate recognizing your EEP status
- For training providers, information about your endorsed courses, including the number of PD Hours and/or CDUs that can be advertised
- All pertinent logos

3.5.2 Course Endorsement Application

[The course application](#) requires the following information:

- Duration in hours
- Name of product (English and native language in which the product will be delivered)
- Any required prerequisites
- Method of delivery
- Audience level
- Learning objectives
- Course outline or syllabus

Payment must be received before the application can be reviewed and assessed.

Once payment is received, your application will be reviewed within fifteen business days. Upon approval, you'll be notified of the approval and the number of PD Hours and CDUs for which the course qualifies.

3.6 Fees

All fee requirements are listed below. The fees paid by a particular EEP participant are determined based on the type of provider and the product(s) offered.

Provider Fees

3.6.1 First Year Fees

- Public Training Providers \$1650 USD* (*includes one course submission only)
The fee breakdown: \$1250 participation fee
\$ 150 course assessment fee
\$ 250 one-time administrative fee
- Internal Training Providers: \$1400 USD* (*includes one course submission only)
The fee breakdown: \$1000 participation fee
\$ 150 course assessment fee
\$ 250 one-time administrative fee

Note

- If the provider application is not approved, the first year fee will be refunded, minus a \$250 administrative fee.
- One course submission is required at the time of submitting the new provider application.

3.6.2 Annual Fees (after first year)

- Public Training Providers: \$1,250
- Internal Training Providers: \$1,000

Notes

- EEP vendors that are also IIBA Corporate Members may be entitled to a discount.

Product Fees

3.6.3 Course Endorsement Application Fee

- \$150 per course each time a course is submitted

3.6.4 Webinar Registration Submission Fee

- [Webinar registrations](#) are FREE for active EEP vendors
- Changes to the webinar requires re-registration of that webinar

Notes

- Other than where explicitly specified, fees are NON-REFUNDABLE.
- All fees are payable in U.S. dollars.
- For training providers registered in Canada, fees are subject to GST/HST.
- Any fees paid using PayPal are subject to a 3.5% service charge fee.

4.0 My course information has changed. What do I do?

If a course has undergone one of the following changes, a reassessment fee of \$150 is applied:

- Substantial overhaul or rewrite
- Change in presentation hours
- Issuance of course in a different media type which results in change to presentation hours or content

For any of the following changes, no fees are applied, but documentation must be submitted:

Changes to

Supporting Documentation Required

Name of Originating
Company/Provider

Submit written request for consideration with accompaniment of legal documentation supporting name change. Complete IIBA's name change form at the time of request.

Contact Person

Submit written request identifying previous contact person's information, including name, email address, and telephone number.

Address	Submit written request identifying information to be changed.
Description or Mission Statement	Submit written request identifying the new mission statement.
Organization Type	Submit written request identifying previous organization type and new organization type (with the accompaniment of legal documentation supporting the organization type change).
Discontinued Course	Submit written request identifying course number and title that has been discontinued.
Languages	Submit written request identifying the language(s) in which the course is now delivered.

5.0 Overview of PD Hours and CDUs

In general,

- Professional Development (PD) Hours are applicable towards qualifying for the CBAP®, CCBA® and ECBA™.
- Continuing Development Units (CDUs) are applicable towards qualifying for recertification of the CBAP® and CCBA®.
- All IIBA endorsed courses and programs offered by EEP vendors are guaranteed to qualify for PD Hours and CDUs.
- All registered webinars offered by EEP vendors are guaranteed to qualify for CDUs towards recertification of CBAP® and CCBA®.
- EEP vendors can advertise PD Hours and CDUs only for IIBA endorsed EEP courses.
- One hour of professional development (i.e. classroom/contact time) is worth one PD Hour or one CDU.
- It is the responsibility of the EEP vendor to manage their own program ID number and allotted PD hours and CDUs. This information will be provided to each vendor upon approval and payment of their course.

- Refer to the certification and recertification handbooks on the IIBA website for more details.

Initial Certification

- CBAP® applicants need 35 PD Hours in the last four years to meet the professional development requirement. The 35 PD Hours must be obtained by the application date.
- CCBA® and ECBA™ applicants need 21 PD Hours in the last four years to meet the professional development requirement. The 21 PD Hours must be obtained by the application date.
- Certification applicants must report the PD Hours in the Professional Development section of their application.

Recertification

- CBAP® and CCBA® recipients need to obtain 60 CDUs over a three year cycle.
- CBAP® and CCBA® recipients may obtain a maximum of 30 CDUs under Category 2: Professional Development from EEP vendors for IIBA endorsed courses and programs over the three year cycle.
- The CBAP® or CCBA® recipient is responsible for reporting CDUs. Please review the applicable recertification handbook.

6.0 Audits

The EEP program conducts random audits of EEP vendors to ensure compliance with IIBA policies and procedures. The EEP program will issue a notice of findings and will request a corrective action plan from providers who have been identified as being non-compliant.

7.0 Annual Renewals

7.1 Provider Renewal Fee

Providers are issued a renewal notice 30 days prior to the annual renewal date.

7.2 Overdue Payments

Payments overdue by more than 15 days passed the organization's renewal date will result in removal of their organization's information from the IIBA website.

For EEPs wishing to renew up to and including 60 days passed their organization's renewal date, an overdue fee of \$250 will be applied to the invoice. **Payment in full must be received for the EEP to be reinstated to the website.** The provider's original renewal date will remain.

Accounts 61 days in arrears will not be reinstated and will require resubmission of all materials for re-entry into the program.

7.3 Lapsed Members

Providers who are passed due, or who voluntarily withdraw from the program and who are not seeking reinstatement must remove all IIBA® EEP™ program logos immediately upon termination of the agreement. With termination, all active endorsement status ceases.

IIBA EEP will publish the vendor's terminated status in *BA Connection*, the monthly newsletter.

8.0 Complaints

Only EEP vendors have the authority to offer training products that incorporate official IIBA trademarks, brands, and copyright materials.

EEP vendors have undergone a review involving a rigorous assessment of the organization's management systems, course materials, and trainers. Organizations not endorsed under the EEP program who use IIBA intellectual property (including, but not limited to, content from the *BABOK® Guide* and IIBA trademarks and certification marks) may be in breach of intellectual property law.

8.1 Complaints against Training Providers

Complaints against training providers who are EEP vendors, will receive a written notice of a complaint. All complaints will be investigated as long as the submitter includes a name, email address, telephone number, and a description of the problem. EEP vendors found to be in breach of IIBA EEP program policies risk losing their affiliation with IIBA.

Complaints against training providers who are not EEP vendors, and who are found to be in breach of intellectual property laws, will be prosecuted by IIBA.

9.0 Trademarks and Copyright

IIBA Endorsed Education Providers are granted a limited, non-exclusive, non-transferable, and revocable license (without the right to sublicense) to use the following IIBA trademarks, registered trademarks, certification marks, registered certification marks, and design marks:

9.1 IIBA Standards and Guidelines

Providers must abide by the [Corporate Standard Guidelines and the Trademark Usage Policy](#) and the intent of such policy.

Any perceived infringement of the policy which could lead a perspective client to perceive that a non-endorsed course (or other product/service) has endorsement status will be identified by the IIBA, and the vendor will be contacted and will be required to remedy the instance. Failure to do so will result in suspension until such time as the breach is remedied.

Repeated transgressions of the policy will result in disciplinary actions, which may include discharge from the program.

9.2 IIBA Logos

Providers may include the Endorsed Education Provider logo on certificates issued to students, providing that the vendor is current in its membership status.

10. Web-based Resources

[Endorsed Education Provider \(EEP™\) Frequently Asked Questions \(FAQs\)](#)

[EEP Resource Page](#)

[Provider application](#)

[Course application](#)

[Webinar Registration Form](#)

[BABOK® Guide](#)

[Corporate Identity and Trademark Policy](#)