



# IIBA®-CBDA RECERTIFICATION HANDBOOK

The Guide to Maintaining the IIBA®-CBDA Designation

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# 1.0 About this Handbook

The purpose of this handbook is to provide the Certification in Business Data Analytics (IIBA®-CBDA) recipients the information needed to maintain their designation. Detailed information about how to enter hours can be found in the [IIBA®-CBDA Recertification Process](#) document.

## 2.0 The Guide to Business Data Analytics

All CDU activities must be aligned to the Knowledge Areas (Domains) as found in the [Guide to Business Data Analytics](#) (Members only), and [IIBAs Introduction to Business Data Analytics: A Practitioners View](#) and [IIBA's Introduction to Business Data Analytics: An Organizational View](#):

1. Identify Research Questions
2. Source Data
3. Analyze Data
4. Interpret and Report Results
5. Use Results to Influence Business Decision Making
6. Guide Company-level Strategy for Business Analytics

## 3.0 About Recertification

### 3.1 Program Overview

Individuals who have attained the IIBA®-CBDA designation must demonstrate an ongoing professional commitment to maintain their certification by satisfying the Recertification program requirements.

The Recertification program supports the ongoing professional development of individuals who have attained their IIBA®-CBDA designation, hereafter referred to as *Recipient*. The purpose of recertification is to:

- Encourage the ongoing professional development of recipients.
- Encourage and recognize individualized learning.
- Encourage the efforts of recipients to *give back* to the profession.
- Offer a standard and objective mechanism for recording professional development activities.
- Sustain the global recognition and value of the designation.

To satisfy the recertification requirements and maintain certification, recipients must earn and report in their **BA Development Log**, a [minimum of 20 Continuing Development Units \(CDUs\) during each one-year cycle](#).

## 3.2 Confidentiality of Information

The recipient's recertification application information and all other recertification program-related materials are kept private and confidential. This information will not be disclosed to anyone other than the recipient without the recipient's consent.

*Notwithstanding any other confidentiality obligation owed by the IIBA® to the recipient, in the event the recipient's [recertification application fee has been paid by a third party](#) ("Sponsor"), the recipient hereby irrevocably [authorizes and directs the IIBA® to release Confidential Results Information to that Sponsor](#).*

Any violation of the IIBA® Confidentiality Policy will be subject to disciplinary action(s) as described in the IIBA® Constitution.

## 4.0 Recertification Process

To maintain certification, recipients must earn a minimum of **20 Continuing Development Units (CDUs) every one-year** from Date of Certification and complete the following goals:

1. Earn a minimum of **20 Continuing Development Units**
2. Enter hours into the **BA Development Log**
3. Pay recertification fee
4. Submit recertification application
5. Receive confirmation email from IIBA® – Congratulations! You are Recertified!

### 4.1 Responsibility of the Recipient

It is each recipient's responsibility to be aware of their recertification date and to comply with all recertification requirements on time or risk losing their certification.

The Certification team will e-mail each recipient, at their primary email address on file, a reminder, prior to their recertification date, that their recertification date is approaching and that they must apply online to renew their credential. Recipients are responsible for ensuring their primary email address with IIBA® is always up to date.

Note: Email communications from IIBA® may inadvertently be blocked or forwarded to bulk mail folders by some spam filters. Recipients should, therefore, add [certification@iiba.org](mailto:certification@iiba.org) to their

personal address book in their email program to help ensure important Recertification program messages from IIBA® and specifically from the Certification team are received.

## 4.2 Determining Your Recertification Date

A recipient's certification begins on the date they pass the certification examination [and ends on the one year anniversary of that date](#). CDU activities must be earned within the 1-year cycle (i.e. [after certification](#) date and [before recertification](#) date).

### 4.2.1 Certified Status

Recipients who recertify prior to their certification expiration date will continue to have certified status for the next one full year and this will be reflected in their **Digital Badge**. They will be listed in the [Certification Registry](#) within the IIBA® website, a public registry that shows verification of a recipient's designation status. Agreement to being on the registry is part of the online certification and recertification process.

### 4.2.2. Suspended Status

Detailed information about how to enter your hours can be found in the [IIBA®-CBDA Recertification Process](#) document.

Recipients who **do not** satisfy the recertification requirements will automatically be placed in suspended status and this will be reflected in their **Digital Badge**. The suspended recipient's name will be removed from the IIBA® online certification registry. Suspended status will last a maximum of four months from the certification expiration date. Suspended status also means that the recipient may no longer use the credential or certification mark, nor identify or represent him/herself as the holder of the credential or as certified by IIBA®. Failure of the recipient to adhere to these guidelines will result in the revocation of the designation.

The movement from suspended status back to certified status requires the recipient to accumulate the required number and qualifying type of CDUs, pay the appropriate fee and agree to [Terms and Conditions](#) and the [Code of Ethical Conduct and Professional Standards](#). Upon meeting all recertification requirements, the recipient's name will be added back to the online registry. Recipients who do not meet their CDU requirements within the suspension period will **lose their designation**. Individuals who lose their designation will be required to re-apply for certification (including taking the exam) to regain their credential.

### 4.2.3 Uncertified Status

The status of recipients who do not recertify will change to **Uncertified** and this will be reflected in the **Digital Badge**. Recipients who become uncertified and wish to reinstate should contact the certification team at [certification@iiba.org](mailto:certification@iiba.org).

## 4.3 Fee Payment & Submission

Recertification consists of an online process via the IIBA® website whereby the recipient enters Continuing Development Units (CDUs), agrees to the Terms and Conditions and Code of Ethical Conduct and Professional Standards, and pays the **Recertification Fee**. The recertification fee is non-refundable. IIBA® must receive the recipient's recertification submission and fee payment by their recertification date.

Payment of the recertification fee can be made either by credit card, money transfer or cheque. When payment is made by cheque or money order, please make them payable to "IIBA®" and mail payment to the address listed within the **Contact webpage**.

Upon submitting and paying for your recertification, the recipient will receive an email stating they are **Approved** or **Approved Pending Audit**. If the recipient's recertification is approved, the recipient is recertified and their next recertification date is one year from their current recertification date. If the recipient is selected for audit, the audit process described in section 7.0 will begin. If recertification is declined for any reason, notice will be emailed to the recipient.

## 5.0 Continuing Development Units (CDUs)

The CDU is the measuring unit used to quantify approved learning and professional service activities. With some exceptions, one CDU is earned for every hour spent in a planned, structured learning experience or professional activity. Fractions of CDUs may be reported in quarter ( $\frac{1}{4}$ ) hour increments.

### 5.1 Online CDU Reporting in the BA Development Log

Activities are reported into the **BA Development Log** using your **IIBA® credentials**. Detailed information is available in the **IIBA®-CBDA Recertification Process** document.

Entries recorded into the Log **cannot be changed after 7 days**. It is recommended that they are entered close to the renewal date.

A minimum of 20 CDUs must be earned within the one-year cycle. CDU categories fall into 2 main streams: **Learning and Applying** and you must have CDUs in both streams with a **minimum of 10 CDUs in the Learning stream** every year.

Recipients may achieve their CDUs in any combination of the various categories. They are not required to report CDUs in all the categories but must report CDUs in more than one category. The following must be considered when applying for recertification:

- CDU activities completed **prior** to obtaining the designation are **not** accepted towards the recertification requirements.
- Participation for the same course/activity **cannot** be claimed more than once and **cannot** be claimed in more than one category.
- Recipients are responsible for reporting their qualifying activities.

## 5.2 Maintaining Supporting Documentation

For each activity claimed, recipients should keep a copy of their submission and all required supporting documentation as outlined in [Section 7.0, Audits and Audit Documentation](#). A percentage of recipients will be randomly selected for audit. Therefore, documentation for all CDU claims must be maintained for 12 months after the one-year cycle has ended.

## 5.3 Transferring CDUs

Recipients who earn more than the required 20 CDUs in their current one-year cycle will automatically have upto **5 of their excess CDUs transferred** to their next one-year cycle.

## 6.0 Earning CDUs

CDUs must be earned within 2 main streams: **Learning and Applying**.

The 2 streams reflect the significance of gaining knowledge and in applying that knowledge in the data analytics space. There are 3 categories within each of the streams.

**You must have CDUs in both streams** and you **must earn a minimum of 10 CDUs in the Learning stream** every year.

Minimums	Learning Stream	Maximums
10 CDUs minimum required in the 'learning' stream	Professional Development	10
	Formal Academic Education	10
	Self-Directed Learning	5
	Applying Stream	
NO minimum CDUs required in the 'applying' stream	Work History (Professional Experience)	10
	Professional Activities	10
	Volunteer Service	10

CDUs can be earned by doing activities in the following 6 categories. Record your hours in the IIBA® online [BA Development Log](#).

Category	CDU Activity Categories	Stream
1.	Professional Development	Learning
2.	Work History (Professional Experience)	Applying
3.	Professional Activities	Applying
4.	Volunteer Service	Applying
5.	Self-Directed Learning	Learning
6.	Formal Academic Education	Learning

## Category 1: Professional Development (Learning Stream)

Professional Development activities include the following:

- A. Classroom Course (courses, seminars, workshops)
- B. Chapter Event (meetings, presentations, development days, events)
- C. Chapter Study Group
- D. Conference Workshop (key notes, tracks, workshops)
- E. Online Course (courses, live webinars)

### A. Classroom Course

1 hour of classroom/contact time is equal to 1 CDU. Fractions of CDUs may be reported in quarter (¼) hour increments. Review the [IIBA®-CBDA Recertification Process](#) document for step-by-step instructions on entering these hours into your [BA Development Log](#).

Content must be aligned with the domains as discussed in the [Guide to Business Data Analytics](#). Courses can be obtained from an IIBA® EEP or other education provider.



## IIBA® Endorsed Education and Training Providers (EEP)

Courses, seminars and workshops automatically qualify if they:

- Align with the domains as discussed in the [Guide to Business Data Analytics](#) and
- Are delivered by an [IIBA® Endorsed Education and Training Provider](#) and have been pre-approved by IIBA®.

Not all courses offered by an EEP are endorsed by IIBA® and only endorsed courses automatically qualify in this category. These courses have already been assessed to ensure they meet the professional development criteria. A listing can be found within the [Endorsed Education and Training Providers](#) section of the IIBA® website.

## Other Education Providers

CDUs may also be earned by attending classroom educational programs offered by other education providers. These are education providers and specifically courses **that have not been endorsed** by IIBA®. They may qualify for CDUs if they meet the following criteria:

1. The subject matter must be directly related to business analysis as per the [Guide to Business Data Analytics](#).
2. It must be moderated/facilitated like a formal course (i.e., there must be a moderator for the session, or a facilitator/instructor who leads the group/individual through the material).
3. There must be a measurable learning objective(s), in terms of either changing behavior or improving skills and, they must be directly applicable to business analysis.
4. It cannot simply be a presentation on a specific topic:
  - a. There must be the opportunity for participants to interact with the material (e.g. be able to ask questions, make the learning meaningful) AND
  - b. There must be an opportunity to practice the task or objective being presented.

Since the course is not endorsed as part of [the IIBA® Endorsed Education and Training Providers](#) program, the CDU value submitted by the recipient will be validated by IIBA® at the time of recertification.

### **B. IIBA® Chapter Event (meetings, events)**

### **C. IIBA® Chapter Study Group**

IIBA® Chapters are [authorized](#) to issue CDUs for their chapter meetings, events and study groups. [View Chapter listing here](#). 1 hour of contact time = 1 CDU and fractions of CDUs may be reported in quarter ( $\frac{1}{4}$ ) hour increments. These will automatically qualify if the content is aligned with the domains as discussed in the [Guide to Business Data Analytics](#).

Chapters keep a record of attendance of recipients in the event of an IIBA® audit so that participants will be able to prove their attendance. Chapters may issue a proof of attendance to the attendees for their records although this is not mandated by IIBA®. It is the **recipient's responsibility** to request a receipt from the Chapter which will indicate the number of CDUs allocated to the event and prove their attendance at the event.

#### D. Conference Workshop (key notes, tracks, workshops)

The content must be aligned with the domains as discussed in the **Guide to Business Data Analytics**.

IIBA® Building Business Capability (BBC) Conference, key notes, tracks and workshops will automatically qualify when the content is aligned with the domains *and* will earn one CDU per contact hour.

CDUs may also be earned by attending other organizations (e.g. Toastmasters) conferences, symposiums, events and programs as long as the content is aligned with the domains.

In this instance, the CDU value submitted by the recipient will be validated by the Certification program at the time of recertification. The documentation for these requires full details including event, provider, date, hours of attendance and full description and proof of attendance. Contact [certification@iiba.org](mailto:certification@iiba.org) for details.

#### E. Online Course (courses, live webinars)

Online Course criteria is the same as the criteria for Classroom Courses and can be obtained from an IIBA® EEP or other education provider. Refer to A. Classroom Course in this section for details. **Live webinars** are included under this activity and are recorded in this Professional Development category.

## Category 2: Work History (Professional Experience) (Applying Stream)

CDUs can be earned by doing business analysis work. The business analysis work **MUST** be aligned with the domains as discussed in the **Guide to Business Data Analytics** to qualify.

- 1000 hours of business analysis work experience/history qualifies for 5 CDUs.
- IIBA® will validate the CDU value submitted and that the experience is aligned accordingly when reviewing the recipient's application at the time of recertification.

## Category 3: Professional Activities (Applying Stream)

The content must be aligned with the domains as discussed in the [Guide to Business Data Analytics](#). These CDUs may be earned by participating in any of the professional activities as described in the following chart under sub-categories, A to F:

Sub-Category	Activity Description	CDUs Earned
3A	Author or co-author of an article published in a refereed journal.	30 CDUs per article
3B	Author or co-author of an article published in a non-refereed journal.	15 CDUs per article
3C	Speaker/Instructor at a conference, symposium, workshop, formal course or IIBA® chapter meeting.	10 CDUs per activity
3D	Member/Moderator of panel discussion at a conference, symposium, workshop or formal course.	5 CDUs per activity
3E	Author or co-author of a textbook.	30 CDUs per book
3F	Developer of content for a structured learning program. A structured program would include learning objectives, interactivity and assessment to ensure that learning has taken place. This could include content used for classroom delivery, online instructor-led delivery or online self-paced delivery.	15 CDUs per program

## Category 4: Volunteer Service (Applying Stream)

CDUs in this category may be earned by giving back to the business analysis profession through volunteer service to a professional or community organization. This can include volunteer service to IIBA® or an IIBA® Chapter, and/or to a non-employer community or charitable group.

CDUs may be earned by volunteering your time in these ways:

- a. Volunteer as a Board member with IIBA® or an IIBA® Chapter
  - You must attend 50% or more of the scheduled meetings
  - 10 bonus CDUs per anniversary year, with 6 months minimum service
  
- b. Volunteer as a committee member to IIBA® or an IIBA® Chapter
  - You must attend 50% or more of the scheduled meetings

- c. Volunteer your business data analytics services to a non-employer community or charitable group
  - Activities must be aligned with the BABOK® Guide
  - Organization sponsoring the work must be a legally recognized not-for-profit

1 hour = 1 CDU. Activities must be aligned with the domains as discussed in the [Guide to Business Data Analytics](#).

## Category 5: Self Directed Learning (Learning Stream)

Self-directed learning CDUs may be earned by doing activities that involve personally designed research and/or study activities such as:

- Informal discussions or coaching sessions with co-workers, clients, or consultants
- The study of resources in books, how-to manuals, on the Internet or other instructional items including archived webinars

1 hour = 1 CDU. Activities must be aligned with the domains as discussed in the [Guide to Business Data Analytics](#).

## Category 6: Formal Academic Education (Learning Stream)

CDUs may be earned by completing 1 or more academic courses offered for degree or diploma credit.

One academic course credit is typically earned for each three hours of class/contact time. One academic course credit qualifies for 1 CDU. For example: a typical 15 credit academic course qualifies for 15 CDUs (although the actual number of class/contact hours is equal to 45 hours).

Courses/programs that automatically qualify include [Endorsed Education and Training Providers](#) courses/programs if content is aligned with domains as discussed in the [Guide to Business Data Analytics](#).

## 7.0 Audits and Audit Documentation

Certified recipients agree to comply with [Terms and Conditions](#) including adherence to the auditing terms. The IIBA® auditing terms provide that all recipients may be subject to an audit at any time. A percentage of recipients will be randomly selected for audit and those selected will be notified by e-mail and will have 60 days from the date of the email to comply with the audit request terms.

During the audit, the recipient's certification status will remain in its current certification status (i.e. Certified, Suspended) until the audit has been completed. Recipients will be permitted to recertify only after the audit has been successfully completed and all audit terms met.

For each activity submitted, recipients should keep a copy of all required supporting documentation.

Any supporting materials submitted to IIBA® become the property of IIBA® so it is highly recommended that the recipient keep their own copies as well.

The following chart outlines the documents required for audit.

Category	Sub- Category	Audit Documentation Required for each CDU Category
1.	<b>Professional Development</b>	
	<p>A: Classroom Course</p> <p>B: Chapter Event</p> <p>C: Chapter Study Group</p> <p>D: Conference Workshop (key notes, tracks, workshops)</p> <p>E: Online Course (course, live webinar)</p>	<p><input type="checkbox"/> IIBA® EEP: Receipt of purchase OR, image of email confirming attendance OR, Certificate of Completion.</p> <p><input type="checkbox"/> Non-EEP Provider: Receipt of purchase OR, image of email confirming attendance OR, Certificate of Completion AND, a link to the full course /event description that describes the content.</p>
2.	<b>Work History (Professional Experience)</b>	<p><input type="checkbox"/> Contacts listed for each work entry will be emailed to validate work experience, hours, and dates.</p>
3.	<b>Professional Activities</b>	
	<p>A &amp; B: Author or co-author of a business analysis article published in a refereed journal or a non-refereed journal.</p> <p>C &amp; D: Speaker/Instructor/ Member/ Moderator at a conference, symposium, workshop, formal course or IIBA® chapter meeting.</p> <p>E: Author or co-author of a textbook.</p> <p>F: Developer of content for a structured learning program.</p>	<p><input type="checkbox"/> Link to or a copy of the article.</p> <p><input type="checkbox"/> Image of the email confirming engagement or a link to the event confirming your role.</p> <p><input type="checkbox"/> Link to where the book is.</p> <p><input type="checkbox"/> Link to the full course description that describes the content or if internal to your organization a description including learning objectives.</p>
4.	<b>Volunteer Service</b>	<p><input type="checkbox"/> Image of email OR,</p> <p><input type="checkbox"/> Certificate from the organization acknowledging the work and dates of your volunteer activity.</p>
5.	<b>Self-Directed Learning</b>	<p><input type="checkbox"/> None required.</p>
6.	<b>Formal Academic Education</b>	<p><input type="checkbox"/> Image of email confirming completion OR,</p> <p><input type="checkbox"/> Image of email confirming attendance OR,</p> <p><input type="checkbox"/> Certificate of completion AND,</p> <p><input type="checkbox"/> <i>If it's not an IIBA Academic member endorsed course/program, a link to the full course description that describes the content.</i></p>

## 8.0 Appeal Process

If a recipient's recertification is denied for any reason, they have the right to appeal by sending an e-mail to [certification@iiba.org](mailto:certification@iiba.org).

IIBA® will have up to 90 days to review the appeal and make a binding decision regarding the validity of the recipient's recertification. The recipient may be contacted by IIBA® for any further information and/or clarification that are deemed necessary to validate recertification information. A final decision will be emailed to the individual.

## 9.0 Responsibilities to the Profession

Recipients have an ongoing responsibility to the business analysis profession. This responsibility is detailed in the [Code of Ethical Conduct and Professional Standards](#), which recipients must review and agree to online when recertifying.

## 10.0 Suspending or Withdrawing Certification

IIBA® reserves the right to revoke the IIBA®-CBDA certification at any time after review of a reported professional misconduct or for a misuse of the IIBA®-CBDA logo or trademarks. IIBA® also reserves the right to conduct random post-certification audits.

All fees paid shall be forfeited in the event of a revoked or suspended credential. Recipients whose certification has been revoked will not be allowed to reapply for the IIBA®-CBDA for a period of time to be decided at the discretion of IIBA®.