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1.0 Introduction

The purpose of this handbook is to provide Certification in Business Data Analytics™ (IIBA-CBDA) recipients the information needed to maintain their designation. Specifically, it explains:

1. The requirements for recertification
2. How to earn continuing development units (CDUs)
3. Using the IIBA online process to:
   • View your recertification information
   • Add CDUs earned
   • Pay the recertification fee
   • Submit your recertification application

Individuals who have attained the CBDA designation must demonstrate an ongoing professional commitment to the business data analytics profession by satisfying the recertification requirements.

Recertification supports the ongoing professional development of individuals who have attained their CBDA designation, hereafter referred to as recipient. The purposes of recertification are to:

• Encourage ongoing professional development
• Recognize individualized learning
• Encourage the efforts of recipients to give back to the profession.
• Sustain the global recognition and value of the designation.

2.0 Requirements for Recertification

Recertification is required every year. To successfully maintain your CBDA designation, you must:

1. Earn a minimum of 20 CDUs
   • CDU activities must be earned within the 1-year cycle (e.g. after your certification date and before the recertification date).
     • **Note:** 5 CDUs earned in the prior recertification cycle can be transferred to the next cycle if they were not used
   • CDU activities must be aligned to the following:
     The five practitioner-based domains as discussed in IIBA’s *Introduction to Business Data Analytics: A Practitioners View*, and one organizational-based domain from 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
2. Agree to the Terms and Conditions
3. Agree to the Code of Conduct
4. Pay the recertification fee
   - $30 IIBA members
   - $50 non-members

When you successfully recertify, your status will remain as Certified. If you do not recertify by your recertification date, your status will change to Suspend, and this will be reflected in your digital badge. Once in Suspend status, you will have 4 months from your recertification date to recertify. If you do not recertify by the end of the 4 months, your status will change to Uncertified and this will be reflected in your digital badge.

3.0 Earning CDUs

CDUs must be earned within 2 main streams: Learning and Applying. These 2 streams reflect the significance of gaining knowledge and in applying that knowledge in the business 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.

Below is a chart that outlines the streams and categories:

<table>
<thead>
<tr>
<th>LEARNING</th>
<th>APPLYING</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Formal Academic Education</td>
<td>4. Professional Activities</td>
</tr>
<tr>
<td>2. Professional Development</td>
<td>5. Volunteer Service</td>
</tr>
<tr>
<td>3. Self-Directed Learning</td>
<td>6. Professional Experience (or Work History)</td>
</tr>
</tbody>
</table>

CDUs can be earned by doing activities in 6 different categories.

1. **Formal Academic Education**

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 **Academic Member recognized courses/programs** if content is aligned with domains as discussed in IIBA's **Introduction to Business Data Analytics: A Practitioners View**, and from IIBA's **Introduction to Business Data Analytics: An Organizational View**.
2. Professional Development

CDUs may be earned by taking training offered by a member of our Endorsed Education Provider (EEP) program, an IIBA Chapter or other training provider. 

1 hour of contact time = 1 CDU and can be added to in increments of .25 hours. 

Different types of professional development activities can contribute to this category for recertification including courses (online and classroom), conferences (track sessions, keynotes, workshops) and IIBA Chapter events (e.g. meetings, presentations, development days/workshops). Training that automatically qualifies if the content is aligned with the domains as discussed in IIBA’s *Introduction to Business Data Analytics: A Practitioners View*, and from IIBA’s *Introduction to Business Data Analytics: An Organizational View* includes:

- EEP endorsed courses, webinars, and conferences – view list here 
- IIBA Chapter study groups, events and meetings – view Chapter listing here

Training that does not automatically qualify upon submission: 

Other training MAY qualify if the content is aligned to the domains as per note above – there is no guarantee of this when an individual submits this training as it is only assessed by IIBA after submission of the recertification application.

3. Professional Activities

Professional Activity CDUs may be earned in 6 possible ways, each type has a different number of CDUs allocated to it and, the content must be aligned with the domains as discussed in IIBA’s *Introduction to Business Data Analytics: A Practitioners View*, and from *Introduction to Business Data Analytics: An Organizational View*:

<table>
<thead>
<tr>
<th>Sub-Category</th>
<th>Activity Description</th>
<th>CDUs Earned</th>
</tr>
</thead>
<tbody>
<tr>
<td>3A</td>
<td>Author or co-author of an article published in a refereed journal</td>
<td>30 CDUs per article</td>
</tr>
<tr>
<td>3B</td>
<td>Author or co-author of an article published in a non-refereed journal</td>
<td>15 CDUs per article</td>
</tr>
<tr>
<td>3C</td>
<td>Speaker/Instructor at a conference, symposium, workshop, formal course or IIBA® chapter meeting</td>
<td>10 CDUs per activity</td>
</tr>
<tr>
<td>3D</td>
<td>Member/Moderator of panel discussion at a conference, symposium, workshop or formal course</td>
<td>5 CDUs per activity</td>
</tr>
<tr>
<td>3E</td>
<td>Author or co-author of a textbook</td>
<td>30 CDUs per book</td>
</tr>
<tr>
<td>3F</td>
<td>Developer of content for a formal learning program</td>
<td>15 CDUs per program</td>
</tr>
</tbody>
</table>
4. Self Directed Learning

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

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

1 hour = 1 CDU. Activities must be aligned to the domains as discussed in IIBA’s *Introduction to Business Data Analytics: A Practitioners View*, and from IIBA’s *Introduction to Business Data Analytics: An Organizational View*.

5. Volunteer Service

a. CDUs may be earned by volunteering your time in these ways:
   - Volunteer as a Board member with IIBA® or an IIBA® Chapter
   - You must attend 50% or more of the scheduled meetings
b. 10 CDU bonus per anniversary year, with 6 months minimum service
   - 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 IIBA’s *Introduction to Business Data Analytics: A Practitioners View*, and from IIBA’s *Introduction to Business Data Analytics: An Organizational View*.

6. Professional Experience (or Work History)

CDUs can be earned by doing business analysis work:

- The work MUST be aligned with the domains as discussed in IIBA’s *Introduction to Business Data Analytics: A Practitioners View*, and from IIBA’s *Introduction to Business Data Analytics: An Organizational View*
- IIBA will validate the CDU value submitted and that the experience is aligned accordingly when reviewing the recipient’s application.
- 1000 hours = 5 CDUs
4.0 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.

IIBA will e-mail each recipient, at their primary email address in the IIBA portal, 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 to their personal address book in their email program to help ensure important Recertification program messages from IIBA® and specifically regarding their recertification are received.

5.0 Online CDU Tracking, Fee Payment & Submission

The process of recertifying consists of entering online via the IIBA portal their CDUs, paying the recertification fee, and agreeing to the Terms and Conditions and Code of Ethical Conduct and Professional Standards. IIBA® must receive the recipient’s recertification submission by their recertification date.
6.0 Audits

When 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. Recipients selected for an audit will be notified by e-mail and will have 60 days from the date of the email to comply with the audit request terms. This time may be extended if necessary, at the discretion of the Certification Body.

The audit process may take up to approximately 2 months from start to finish. A minimum of 2 weeks may be needed from the time the last piece of information is received by IIBA®. Once all information is received by IIBA® and analyzed, audit results will be communicated by e-mail. The audit documentation required for each CDU Category is listed below:

<table>
<thead>
<tr>
<th>Category</th>
<th>Description</th>
<th>Audit Documentation</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Formal Academic Education</td>
<td>An official transcript or equivalent (i.e. a notarized copy), and a brochure or course materials outlining the subject matter covered.</td>
</tr>
<tr>
<td>2</td>
<td>Professional Development</td>
<td>A certificate of achievement or e-mail confirming attendance.</td>
</tr>
<tr>
<td></td>
<td>EEP Endorsed &amp; Academic Member recognized training</td>
<td>A certificate of achievement or e-mail confirming attendance.</td>
</tr>
<tr>
<td></td>
<td>IIBA Chapter Study Groups, Meetings, Events</td>
<td>Proof of or e-mail confirming attendance for meetings.</td>
</tr>
<tr>
<td></td>
<td>Other Training &amp; Events</td>
<td>A certificate of achievement (for courses) or e-mail confirming attendance (for live webinars, seminars, workshops, events), and a brochure or materials outlining the subject matter covered.</td>
</tr>
<tr>
<td>3</td>
<td>Professional Activities</td>
<td>Link to/soft copies of publications, sample educational materials, course agenda, and description of the activity.</td>
</tr>
<tr>
<td>4</td>
<td>Self-Directed Learning</td>
<td>None required</td>
</tr>
<tr>
<td>5</td>
<td>Volunteer Service</td>
<td>An e-mail or certificate from the organization acknowledging the recipient’s work and dates of the volunteer tasks.</td>
</tr>
<tr>
<td>6</td>
<td>Professional Experience</td>
<td>Contacts listed for each work entry will be e-mailed to validate work experience, hours, and dates.</td>
</tr>
</tbody>
</table>

During the audit, the recipient’s certification status will remain in its current certification status (i.e. Active, 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. A percentage of recipients will be randomly selected for audit. 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.
7.0 Appeal Process

If a recipient’s recertification application is denied for any reason, he/she has the right to appeal by sending an e-mail to 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 application. The recipient may be contacted by IIBA® for further information and/or clarification that are deemed necessary to validate any of the recertification application’s information. A final decision will then be e-mailed to the recipient.