



Handbook

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About this Handbook

This handbook is intended to help current and potential participants in the Endorsed Education Provider™ (EEP™) program understand the framework, levels of engagement, benefits, fees and procedures.

The EEP™ Program

Objectives

Business analysis (BA) professionals need to continually develop their competencies throughout their career progression. As THE professional member 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, it is important for IIBA to support education providers further serving the BA community. The EEP program achieves this by providing participants the following:

- Endorsement of learning events (e.g. courses, conference dates, webinars, etc.) that enable the BA community to easily identify professional development that is relevant and aligned with the *Guide to the Business Analysis Body of Knowledge (BABOK® Guide)*.
- Licensing to IIBA intellectual property (IP) including trademarks and *BABOK® Guide* content, as per the IIBA Corporate Identity and Trademark policy.
- A community of education providers that together with IIBA are helping business analysis professionals to grow along their career path from entry into the field through to retirement.

Benefits

Through this program, participants are granted:

- the ability to have learning events endorsed and advertised by IIBA. IIBA endorsed learning events' contact hours either qualify as professional development (PD) hours for the ECBA™, CCBA® and CBAP® application process and/or as Continuing Development Units (CDU) required for recertification of the CCBA® and CBAP® designations.
- permission and tools necessary to publicize their affiliation with IIBA as an IIBA Endorsed Education Provider and their endorsed courses/programs (subject to IIBA terms and conditions)
- a non-exclusive, non-transferable, non-assignable, and revocable license to use content from the *BABOK Guide®* in courseware endorsed by IIBA.
- IIBA memberships in accordance with the program level purchased.

Membership Requirements

To qualify for the EEP Program, education providers must satisfy the following criteria:

- Be an accredited training provider that offers courses, programs, and/or webinars on topics aligned to one or several areas of the *BABOK Guide*®. This includes:
 - Public training providers:
 - This includes courseware developers who develop courses/programs but may not deliver them directly.
 - Internal training providers:
 - Organizations that participate in business to business transactions and that only provide training to their own employees.
 - IIBA Corporate members whose internal training department only offers training to its own employees. Must be in active status.
 - Note: internal training providers must not advertise/offer their endorsed learning events to the general public – these endorsed courses are for internal staff only.
- If audited by IIBA, provide access to up to four years of student records
- Agree to abide by the EEP™ program’s terms and conditions.
- Agree to abide to the terms and conditions of the **IIBA® Corporate Identity and Trademark Policy**

Please note: If you have been operating for less than one year, IIBA may request for information regarding your experience in business managing the day to day business administration requirements.

Fees

The following table of fees are determined based on type of education provider and the products offered:

Provider Type	Select Level	Premier Level
Public Training Provider	<p>Initial fee \$1650 (incl \$250 non-refundable admin fee)</p> <p>Yearly renewal fee \$1400</p> <p>Annual Add-on fee of \$150 will apply per learning event added above limit. (Note: only up to 3 online courses permitted at this level)</p>	<p>Initial fee \$2250 (incl \$250 non-refundable admin fee)</p> <p>Yearly renewal fee \$2000</p>

Provider Type	Select Level	Premier Level
Internal Training Provider	n/a	Initial fee \$1250 (incl \$250 non-refundable admin fee) Yearly renewal \$1000

Important:

- If the provider application is not approved, the initial application fee will be refunded, minus a \$250 administrative fee.
- 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.
 - Wire transfer are subject to a \$28 USD swift transfer fee.

Features

	Select Level	Premier Level
Value Proposition	1. Limited endorsement 2. Affiliation & branding 3. License to IP 4. Online rating system 5. Regular engagement 6. Raised Profile	1. Unlimited endorsement 2. Affiliation & branding 3. License to IP 4. Online rating system 5. Regular engagement 6. Raised Profile 7. Giving Back Incentives 8. Preview to IP 9. Corporate Engagement 10. Multiple Office Listings
Endorsement of Courses and Conference dates	Up to 3 learning events	Unlimited
Endorsement of Webinars	Unlimited	Unlimited
Multiple Office Listings: Ability to promote IIBA endorsement under multiple office locations on a global scale	Single	Multiple

Benefits

	Description of Benefit	Select Level	Premier Level
EEP online community	Access to EEP™ dedicated Linked-In group.	✓	✓
Pre-approved PD hrs./CDUs for certification	Endorsed learning events can qualify towards the PD hrs and CDUs required for IIBA certification and recertification. For more information, refer to Appendix A.	✓	✓
License to <i>BABOK® Guide</i> content	Use BABOK® guide content within endorsed learning events, as per the EEP terms and conditions.	✓	✓
IIBA logos and branding	Use IIBA EEP logos to advertise IIBA endorsement, as per the EEP terms and conditions and IIBA corporate identity and trademark policy.	✓	✓
Guide to Competency-Based Certification & certification learning objectives	Access to resources which enable the EEP™ to better prepare students for IIBA Certifications.	✓	✓
Individual memberships for EEP staff	Access to IIBA individual membership benefits to support the development of endorsed learning events or your staff's own professional development and growth.	2	4
Promotion	IIBA will advertise endorsed learning events in a public international directory.	✓	✓
Online student rating system	Endorsed learning events can be rated by students and publicly displayed.	✓	✓
Chapter engagement	IIBA will connect EEPs with local IIBA Chapters to help create a win-win relationship, for the benefit of your students within your local community.	✓	✓
Online calendar of upcoming endorsed courses	Endorsed certification exam preparation courses upcoming every three months are advertised within a public international online calendar.		✓

	Description of Benefit	Select Level	Premier Level
ECBA+ Program	Resources to help prepare your students for the ECBA exam and to give your students hands-on experience to raise their proficiency levels from knowledge to application.		✓
Certification summary information	EEPs will be provided with certification exam statistics to help refine and target courseware to meet education needs.		✓
Giving Back Incentive	10% discount of corporate revenue (off one EEP renewal fee) for initiating new IIBA corporate member or 10% discount of fee on sponsored amount (off one EEP renewal fee) for sponsoring local Chapter.		✓
Corporate member engagement	Corporate members will be given the list of EEPs in their areas for possible communication/collaboration.		✓
Preview of IIBA global standards	Preview of IIBA global standards before its public release to the BA Community.		✓
Access to customizable marketing materials for IIBA products/services	Access to marketing materials branded with the EEP™ logo on IIBA products/services for events and meetings within your community.		✓
Ability to respond to RFPs for training submitted by IIBA Corporate Members	Opportunity to respond to RFPs received by Corporate Members for employee training.		✓
20% discount on the IIBA website's advertising space	Discounted pricing for IIBA website's advertising space.		✓

Application Process

Step 1: Review the EEP program's framework and benefits.

Step 2: Choose the level (i.e. Select, Premier) of engagement that suits your needs.

Step 3: Complete the **EEP Program Enrollment Application**.

Within this process, you must:

- Provide evidence of an established methodology for selecting, and supporting development of professional staff
- Provide evidence of an established process for receiving and addressing student's complaints, concerns and evaluation feedback
- Provide evidence of an established, formalized methodology to track student performance and evaluate knowledge transfer
- Agree to the IIBA EEP Program's Terms and Conditions
- Pay for the initial fee based on the level selected.

Upon completion of payment, you will receive an e-mail from IIBA with instructions on how to access your respective level's benefits.

Step 4: At any point during your term, you may submit a course or webinar endorsement application form.

Upon receipt, assessments may take up to two weeks.

EEP Account Changes

All account changes can be done from your account using the *Manage My Organizational Account* option, located within the Membership tab

Audits

IIBA conducts random audits of EEPs and their endorsed courses to ensure compliance with IIBA policies and procedures. A notice of findings and a request for a corrective action plan will be issued to providers who have been identified as being non-compliant.

Renewal Process

Renewal Reminders

EEPs are issued a renewal notice 60 and 30 days prior to the annual renewal date.

Overdue Payments

Overdue payments will result in removal of your organization's information from the IIBA website, this includes the status of endorsed learning events to become inactive.

For EEPs wishing to renew 60 days passed their account's renewal date, a late fee of \$250 will be applied to the invoice. **Payment in full must be received in order to be reinstated to the website.** The original account's annual renewal date will remain.

Accounts 90 days in arrears will not be reinstated and will require recompletion of the EEP program enrollment process.

Lapsed Members

EEPs 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.

Complaints

Only active EEPs have the authority to offer endorsed learning events and products that incorporate the official IIBA trademarks, brands, and copyright materials.

Organizations, that are not active members of 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.

To report any organizations in breach of intellectual property law and/or misusing our trademarks, brands and/or copyright materials, please e-mail eeep@iiba.org.

Complaints against Training Providers

Complaints against an active EEP must include a name, email address, telephone number, and a description of the problem in order to be investigated.

The EEP involved in the complaint will receive a written notice of the complaint. This complainant will remain anonymous to the respective EEP.

Complaints could result in an audit of the EEP.

EEPs found to be in breach of IIBA EEP program's terms and conditions and policies risk losing their affiliation with IIBA.

Trademarks and Copyright

Active EEPs 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.

IIBA Standards and Guidelines

EEPs 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 an individual to perceive that a non-endorsed course (or other product/service) has endorsement status will be investigated by the IIBA. The vendor will be contacted and required to remedy the instance.

For an education provider to offer a CBAP®, CCBA® or ECBA™ exam preparation course, the provider must be an active EEP and the course must be endorsed; otherwise this is an infringement of the above policy.

If this infringement is done by an active EEP, failure to comply will result in suspension until the breach is remedied. Repeated transgressions of the policy done by an active EEP will result in disciplinary actions, which may include discharge from the program.

Failure to comply with remedies of an infringement may result legal action.

IIBA Logos

Active EEPs may include the EEP logo on certificates issued to students representing the completion of an IIBA endorsed learning event.

Questions

All questions, comments and feedback can be e-mailed to eep@iiba.org.

Appendix A: Endorsing Learning Events

Endorsed Learning Events can include courses, webinars or conferences, and must belong to an active EEP. For a learning event to be endorsed under the EEP program, it must either be:

- Directly related to one or several of the *BABOK® Guide* Knowledge Areas and/or underlying competencies.
- Related to other BA activities and streams as described in the tools and techniques and the perspectives sections within the *BABOK® Guide*.

Benefits of Endorsing Learning Events

By having your learning events endorsed by IIBA under the EEP program, the business analysis community are assured that:

- The education training provider has been reviewed by IIBA and meets the requirements for participating in the EEP program.
- The education training provider is properly licensed to use IIBA intellectual property (IP), and are using up-to-date IP.
- Any learning event (i.e. courses, webinars, conferences) endorsed by IIBA:
 - Represents alignment to the current globally recognized industry standard for business analysis practices: the *BABOK® Guide*.
- Any course endorsed by IIBA:
 - Has effective practices and standards for delivery of education programs.
 - Has procedures in place to update curriculum delivery, especially to address student concerns.
 - Has instructors that are appropriately qualified to deliver the course

Endorsement of Courses and Conferences

Courses and Conferences qualify for endorsement if:

- They are at a minimum one (1) hour in duration.
- At least **75%** of the content delivered is aligned to any area within the *BABOK® Guide*: tools and techniques, perspectives, underlying competencies, and/or one or several of the knowledge areas.
- There must be a mechanism to confirm knowledge or skill transfer (i.e. an assessment of the content learned), such as a test.

- If the endorsed course is an IIBA certification exam preparation course, the instructor must be IIBA certified at that level or above.

Please note: An entire program cannot be submitted for endorsement via one course endorsement application form submission. Each course within the program must be submitted separately to be considered for endorsement. An individual course endorsement does not constitute program endorsement.

Endorsement of Webinars

Webinar qualify for endorsement if:

- At least **75%** of the content delivered is aligned to any area within the *BABOK® Guide*: tools and techniques, perspectives, underlying competencies, and/or one or several of the knowledge areas.

Endorsement of Learning Events and the IIBA Certification Program

Endorsed learning events' contact hours may qualify towards as professional development (PD) hours for the ECBA, CCBA or CBAP application and Continuing Development Units (CDU) required for recertification. The possible qualifications are as follows:

- All endorsed learning events' contact hours qualify as PD hours for the ECBA application
- All endorsed events' contact hours qualify as CDUs for recertification of CCBA or CBAP
- Endorsed Courses and Conference Workshops, which meet the professional development criteria discussed in Appendix B, qualify professional development (pd) hours for the CCBA and CBAP application

EEPs can only advertise PD hours and CDU qualification for endorsed learning events.

For more information on certification and recertification, please refer to the **certification** and **recertification** handbooks.

Appendix B: Professional Development Criteria

For endorsed learning events to qualify towards the CCBA or CBAP professional development requirement, it must meet the following criteria:

1. It must be moderated/facilitated similar to 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).
2. There must be a measurable learning objective (or set of objectives), and those must be directly applicable to the role of the business analyst (i.e., in terms of either changing behaviour or improving skills).
3. It cannot simply be a presentation on a specific topic:
 - a. There must be the opportunity for students to interact with the material (e.g., be able to ask questions, make the learning meaningful)
 - b. An opportunity to practice the task or objective being presented and, be assessed by the facilitator/moderator.
4. The subject matter must be directly related to business analysis or its underlying competencies as per the BABOK® Guide.

One hour of classroom/contact time is equal to one hour of Professional Development. Fractions of Professional Development hours may be reported by the applicant in quarter ($\frac{1}{4}$) hour increments after one full hour. If the Professional Development is less than one hour, it does not qualify for any credit.