CONTRACT MANAGEMENT
Continuing Professional Education

NCMA
NATIONAL CONTRACT MANAGEMENT ASSOCIATION
CONNECTING TO
CREATE WHAT'S NEXT

Last Update May 15, 2023

Contract Management
Continuing Professional Education Guide

Last Update May 15, 2023

National Contract Management Association
21740 Beaumeade Circle, Suite 125
Ashburn, VA 20147

Telephone: 800.344.8096 or 571.382.0082
Fax: 703.448.0939
www.ncmahq.org

Contact: certification@ncmahq.org

The *Contract Management Continuing Professional Education Guide^{TM}* was last updated on May 15, 2023.

Table of Contents

Contract Management
Continuing Professional Education Guide

1.0 Statement of Contract Management Continuing Professional Education

The National Contract Management Association (NCMA) is the authoritative professional association in the practice of contract management with a legacy of proven and meaningful results in professional and leadership development. To build trust in learning events being capable of establishing and increasing competence, NCMA has created the *Contract Management Continuing Professional Education Guide™* (CPE Guide) to define and assess continuing professional education (CPE). Approved CPE is required for NCMA certification and recertification.

1.1 Preamble

NCMA was founded in 1959 and has become 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. 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 CPE Guide is to establish a framework for the development, presentation, measurement, and reporting of CPE to ensure contract managers receive the quality learning activities necessary to satisfy their obligations and desires for growth in individual competence that leads to improved organizational capability.

1.3   Definitions
"Contract management" means the actions of a contract manager to develop solicitations, develop offers, form contracts, perform contracts, and close contracts. [Source: ANSI/NCMA ASD 1-2019 (R2022).]

"Contract manager" means the authorized representative or agent for a contracting party. [Source: ANS/NCMA ASD 1-2019 (R2022)].]

"Applicant" means a person who has submitted a certification application, but the application has not yet been approved.

"Candidate" means a person who has an approved certification application but is not yet certified.

"Certificant" means a person holding a certification in good standing.

"Retired certification status" means a recognition bestowed on eligible certificants who no longer practice in contract management or related fields. It is not an active certification status.

1.4   Participation
Successful contract managers 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 continuing education encompasses programs contributing to the development and maintenance of professional skills.

2.0　Categories of CPE

2.1　Certification and Recertification Requirements
CPE that would satisfy certification and recertification requirements must be in topics or related to the competencies identified in the *Contract Management Body of Knowledge*® (CMBOK). Please refer to Appendix One for the outline of CMBOK competencies.

2.2　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 the CPE requirement 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.

2.3　Qualifying CPE
Qualifying CPE for certification must be earned no later than ten (10) years from the date of application for certification. Qualifying CPE are those professional development opportunities which must be in topics or related to the competencies in the CMBOK®. Please see the Appendix One, which presents the CMBOK® outline of competencies and Section 3.0, Acceptable Programs and Activities, for information on determining qualifying CPE. It is up to each individual to determine what professional development opportunities they need and their applicability to the CMBOK® competencies.

2.4　Recertifying CPE
To keep certification(s) active, the certificant must earn qualifying CPE within the designated recertification period provided in the certification handbook.

The certificant 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 completed CPE, and

- Monitoring their own progress toward meeting the CPE requirements.

2.5   Unacceptable Programs, Activities, Topics, and Subjects

Learning events without learning objectives and a measurement of how the learning objective was achieved are not acceptable. In addition, repeated learning events where CPE was already awarded are not acceptable.   Examples of programs, activities, topics, and subjects that do not qualify for 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 or courses that allow the participant to test out.

- Programs that are not designed to maintain or enhance contract managers' competence, but are designed for the general public (e.g., resume writing, improving parent–child relations, personal investments, money management, retirement planning, etc.).

- Sales-oriented programs that demonstrate office equipment.

- 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.

- Preparation and presentation time for repeated presentations.

- College courses cannot be counted as CPE and used to meet the education eligibility requirements of a certification (i.e., no double dipping). If the course is not used to meet the education requirements and is completed within the eligible timeframe for a certification application or recertification application, the CPE apply.

3.0 Acceptable Programs and Activities

NCMA does not establish detailed criteria for CPE programs; however, it does require that CPE contribute to the designated contract manager's professional competence and growth. To determine if programs contribute to professional competence and to facilitate documentation, the following criteria for CPE programs may be considered as appropriate.

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 or experienced 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 or experienced individuals. The nature and extent of any review may vary depending on characteristics of the program.

- Evaluations of the program are obtained from instructors and participants, when appropriate.

3.2 Group Programs

"Group programs" are where the program is presented by a qualified instructor or discussion leader. The following are provided as examples and is not an all-inclusive list of acceptable group programs:

- Internal training programs (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 such as those included here. Informal discussions of current events in the contract management profession do not qualify for CPE.

- University and college courses (credit and noncredit).

- Training programs presented by contract management organizations, educational organizations, foundations, and associations at conferences, conventions, meetings, seminars, and workshops of professional organizations.

3.3   Individual Programs

"Individual programs" are where participants are required to register for the program and the program sponsor provides documentation of participation, such as a certificate or other document, of satisfactory completion. The following are provided as examples and is not an all-inclusive list of acceptable individual programs:

- Online courses.

- Online and webinar events.

3.4   Work Experience in Contract Management

For recertification purposes only, NCMA certificants may earn two (2) CPE for each full year of continued work experience in contract management or related field within their recertification cycle (see Appendix One to view the outline of CMBOK competencies). Proof of employment and a job description are required (e.g., a resume).

3.5   Other Professional Activities

"Other professional activities" include the following examples:

- Serving as a speaker, instructor, or discussion leader at group programs. Proof of participation must be provided (see Section 7.0 Maintaining Documentation for guidance).

- Serving as an appointed reviewer of abstracts for breakout sessions in conferences, symposia, etc. An appointment document must be provided.

- Publishing articles and books or developing CPE courses on topics and subjects that qualify for CPE and that contribute directly to the author's professional competence.

- Serving on a magazine or journal review board. An appointment document must be provided.

- Serving as a mentor or learner in a formal mentoring program. An appointment document must be provided.

- Serving as an item writer for certification examinations. An appointment document with recommended CPE from the certification sponsor is required.

4.0 Measuring CPE

A CPE hour may be granted for each 50 minutes of participation in qualifying programs and activities. At conferences and conventions, 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.

Sponsors of CPE programs should monitor their programs to accurately assign the appropriate number of hours. Learners should earn CPE only for the actual time they attend the program. Preparation time for students participating in a CPE program is not counted.

Hours awarded in a measurement other than CPE will need to be converted to CPE using the following conversion method.

1 CEU = 10 CPE

1 CPU = 10 CPE

1 CLE = 1 CPE

1 CLP = 1 CPE

1 PDU = 1 CPE

4.1 University or College Courses

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

- Each semester hour credit equals 15 CPE, and

- Each quarter hour credit equals 10 CPE.

Instructors for university or college credit courses should receive CPE based on the number of credit hours the university/college gives a student for successfully completing the course (e.g., a 3-semester hour credit course x 15 CPE per semester hour = 45 CPE).

An instructor should not receive CPE for teaching a course more than once unless the course was changed significantly.

4.2 Individual Study Programs

Participants in individual study programs should be granted CPE when they satisfactorily complete the program. These programs generally should be pre-tested by the vendor or sponsor to determine the average completion time, and CPE should be granted in an amount equal to the average completion time.

For example, an individual study program that takes an average of 600 minutes to complete should be granted 12 CPE.

Speakers, instructors (university/college noncredit courses), and discussion leaders at programs that qualify for CPE should receive CPE 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 their 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). An individual should not receive CPE for either preparation or presentation time for repeated presentations unless the topic or subject matter involved was changed significantly.

4.3 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 CPE may be granted for each hour devoted to writing articles, books, or course materials that are published.

The following figure presents a summary of qualifying speaking and writing activities to earn CPE.

Activity	# CPE	When does it qualify?
Develop a Course or Presentation	2 CPE per contact hour of the course or presentation	The year the course or presentation is initially presented
Preparation for a Course or Presentation	2 CPE per contact hour of the course or presentation	The year the updated course is initially presented (cannot claim CPE for additional presentations)

Present a Course or Presentation	1 CPE per contact hour	The year the course or presentation is initially presented (cannot claim CPE for additional presentations)
Write an Article or Book	1 CPE per hour	The year the article or book is published

5.0 Qualified Instructors
Instructors must be qualified with respect to both program content and instructional methods used.

5.1 Qualifications of Instructors
Instructors are key ingredients in the learning process for any learning program or session. Therefore, it is imperative that great care is exercised in selecting qualified instructors for all CPE-granting events.

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, skilled in the use of the appropriate instructional methods and technology, prepared in advance, and must strive to engage participants.

5.2 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.

6.0 Evaluating Learning
An effective means for evaluating learning activity must be employed to measure quality with respect to content and presentation, as well as provide a mechanism for participants to assess whether learning objectives were met.

6.1 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,

- Time allotted to the learning activity was appropriate, and

- Individual instructors were effective.

It is not necessary to solicit an evaluation from the instructor if the instructor is actively involved in the development of the program materials.

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

7.0   Documentation & Audit Process

7.1   Audit Process
Supporting CPE documentation is not required to be submitted with a certification or recertification application. All applications for certification and recertification are subject to audit, though only a percentage of applications will be audited. Applicants selected for audit must submit CPE documentation which meets the documentation requirements as specified in section 7.2, maintaining documentation, before their application will be approved. NCMA staff will notify you by email if your application has been selected for audit with instructions for submitting the required documentation. Though it is not required, applicants may still choose to upload their supporting documentation with their applications if they desire.

The audit selection process will be conducted at random. However, NCMA reserves the right to select any applicant for audit at any time.

7.2   Maintaining Documentation
Learners are required to maintain documentation of CPE earned. Supporting documentation should include the following information for reported CPE:

- Provider organization.

- Title of the program or a brief description of its contents.

- Dates of the course.

- Duration of the event or number of CPE earned.

- Documentation of attendance or completion.

Supporting documentation meeting these requirements could take many different forms. The following are some examples of how the requirements could be captured and is not meant to be an all-inclusive list.

- o Record of the grade received for a university or college credit course;

- o Record of attendance, such as a meeting invite, screenshot of the course completion, certificate, email from the course sponsor of the completion, etc.

- o Certificate of completion from the program sponsor.

- o Email of completion from the program sponsor.

- o Copy of the published book, article, or course.

- o Copy of the agenda, course advertisement, or a printout of the course description.

- o If CPE are not documented, using Section 4.0 Measuring CPE, calculate the CPE based on duration of the course which can be documented via any form that shows the course dates/ duration (i.e., agenda, meeting invite, screenshot of the course description page that shows this detail, etc.)

- • CPE Supplemental Documentation, provided in Appendix Two may be used if adequate documentation is not available in any other form from the sponsoring organization.

8.0   Planning for Continuous Learning

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

The accomplishment of CPE should be a targeted, planned, and deliberate activity. Take full advantage of the time allotted for each recertification cycle to ensure you maximize time, continue to develop professionally, and provide ease come recertification time.

Appendix One: Outline of CMBOK Seventh Edition Competencies

A. Leadership	B. Management	1.0 Guiding Principles	2.0 Pre-Award	3.0 Award	4.0 Post-Award	C. Learn
A.1 Competence	B.1 Business Management	1.1 Skills and Roles	2.1 Plan Solicitation	3.1 Price or Cost Analysis	4.1 Administer Contract	C.1 Continuous Learning
A.2 Character	B.2 Change Management	1.2 Contract Principles	2.2 Request Offers	3.2 Plan Negotiations	4.2 Ensure Quality	C.2 Individual Competence
A.3 Collaboration	B.3 Financial Management	1.3 Standards of Conduct	2.3 Plan Sales	3.3 Select Source	4.3 Manage Subcontracts	C.3 Organiza-tional Capability
A.4 Emotional Intelligence	B.4 Project Management	1.4 Regulatory Compliance	2.4 Prepare Offer	3.4 Manage Disagreements	4.4 Manage Changes	
A.5 Vision	B.5 Risk Management	1.5 Situational Assessment			4.5 Close Out Contract	
	B.6 Supply Chain Management	1.6 Team Dynamics				
		1.7 Communication and Documentation				

Appendix Two: CPE Supplemental Supporting Documentation

Provider	Title/ Description	Date(s) Attended	Duration (in hours)	CPE Earned	Attestation of Completion
					☐
					☐
					☐
					☐
					☐
					☐
					☐
					☐
					☐
					☐
					☐
					☐
					☐
					☐
					☐

I hereby affirm that all statements and information set forth herein are true and correct. I understand that any falsification, willful misrepresentation, or omission intending to mislead NCMA may forfeit my rights to certification. I have read and understand the contents and professional implications of the NCMA Code of Ethics and the NCMA Certification Policies and Procedures Agreement.

Name: _____

Signature: _____

Date: _____