



# 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:

- a non-exclusive, non-transferable, non-assignable, and revocable license to use content from the BABOK Guide® in courseware endorsed by IIBA.
- 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)
- 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 a registered business with a minimum of 6 months of operation time in a training capacity 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 Terms and Conditions](#)

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.

## Endorsed Education Provider Program 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><b>Initial fee</b> \$1650 (incl \$250 non-refundable admin fee)</p> <p>Yearly renewal fee \$1400</p> <p><b>Annual Add-on fee</b> of \$150 will apply per learning event added above limit.</p>	<p><b>Initial fee</b> \$2250 (incl \$250 non-refundable admin fee)</p> <p>Yearly renewal fee \$2000</p>
Internal Training Provider	n/a	<p><b>Initial fee</b> \$1250 (incl \$250 non-refundable admin fee)</p> <p>Yearly renewal \$1000</p>

### 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 transfers are subject to a \$28 USD swift transfer fee.

## Features

	Select Level	Premier Level
<b>Value Proposition</b>	1. Limited endorsement 2. Affiliation & branding 3. License to IP ( <i>BABOK Guide®</i> ) 4. Regular engagement 5. Raised Profile	1. Unlimited endorsement 2. Affiliation & branding 3. License to IP ( <i>BABOK Guide®</i> and <i>Agile Extension®</i> ) 4. Regular engagement 5. Raised Profile 6. Giving Back Incentives 7. Corporate Engagement 8. Multiple Office Listings
<b>Endorsement of Courses and Conferences</b>	Up to 3	Unlimited
<b>Endorsement of Webinars</b>	Unlimited	Unlimited
<b>Multiple Office Listings:</b> Ability to promote IIBA endorsement under multiple office locations	Single	Multiple

## Benefits

	Description of Benefit	Select Level	Premier Level
<b>Pre-approved PD hours/CDUs for certification</b>	Endorsed learning events can qualify towards the PD hours and CDUs required for IIBA certification and recertification.	✓	✓
<b>License to <i>BABOK® Guide</i> content</b>	Use <i>BABOK® Guide</i> content within endorsed learning events, as per EEP terms and conditions	✓	✓
<b>IIBA logos and branding</b>	Use IIBA EEP logos to advertise IIBA endorsement, as per EEP Terms and Conditions and IIBA Trademarks and Guidelines policy	✓	✓
<b>Promotion</b>	IIBA will advertise endorsed learning events in a public international directory.	✓	✓
<b>Individual memberships for EEP staff</b>	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

	Description of Benefit	Select Level	Premier Level
<b>Bulk Purchase Discounts on Membership/Certification bundles</b>	Discounts on bulk purchases of IIBA Memberships <b>and</b> ECBA, CCBA or CBAP exams (Minimum 10 memberships and 10 exams)	✓	✓
<b>ECBA, CCBA and CBAP Learning Objectives, and Guide to Competency-Based Certification</b>	Access to resources which enable the EEP™ to better prepare students for IIBA Certifications.	✓	✓
<b>Chapter engagement</b>	IIBA can connect EEPs with local IIBA Chapters to help create a win-win relationship	✓	✓
<b>License to <i>Agile Extension to the BABOK® Guide</i> content</b>	Use <i>Agile Extension to the BABOK®</i> guide content within endorsed learning events, as per the EEP terms and conditions.		✓
<b>Access to AAC learning objectives</b>	Access to the AAC learning objectives to aid in developing and delivering AAC exam preparation courses		✓
<b>Online calendar of endorsed Certification Exam Prep Courses</b>	Ability to list Endorsed certification exam preparation courses within an online calendar.		✓
<b>Bulk Purchase Discounts on Membership/AAC Certification bundles</b>	Discounts on bulk purchase of IIBA Memberships with AAC exams. (Minimum 10 memberships and 10 exams)		✓
<b>Curriculum for entry level, hands-on business analysis program</b>	Curriculum for an instructor-led, hands-on application of key business analysis techniques via case studies and exercises. Includes an assessment to ensure an individual is ready to perform on day 1 of their first BA position.		✓
<b>Corporate member opportunity</b>	Appear on a list of Premier-level EEPs sent to Corporate members upon request or in the event of any RFP requests.		✓
<b>Giving Back Incentive</b>	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.		✓

## EEP Membership Join Process

**Step 1:** Review the EEP program's framework on the [EEP website](#)

**Step 2:** Based on the needs of your organization, decide on the membership level (Select, Premier, or Internal Training Provider)

**Step 3:** Under 'Levels of Engagement' on the [EEP website](#), click to join the applicable membership level to start the process of joining the program

Within this process, you must:

- Provide information about your organization
- Provide legal documentation demonstrating that you are a registered training business
- Agree to the IIBA Privacy Policy, IIBA Terms and Conditions, and IIBA EEP Terms and Conditions

**Step 4:** Complete your EEP membership payment

Upon completion of payment, you will receive an e-mail from IIBA with instructions on how to access your membership benefits. The EEP Program Manager will review the application, activate membership and reach out to the listed Primary Contact to provide a certificate, logo and further instruction.

## Course Endorsement Process

At any point during your EEP membership term, you may submit a course for potential IIBA endorsement via a course application form (accessible within the Endorsed Education Provider Resources webpage that you gain access to once your membership is activated). Within the Course Application form, you will be required to provide information about the course, including:

- Demonstrating alignment to the *BABOK® Guide v3* Knowledge Areas and/or underlying competencies
- Describing an established process and criteria for creating a course and selecting instructors
- Information about a formalized process for gathering/addressing student feedback
- Information about how students will be evaluated to ensure knowledge transfer

Upon receipt, course assessments may take up to two weeks before a decision is reached regarding IIBA endorsement.

Endorsed courses are listed within an online directory on IIBA's website. EEPs are permitted to display an *EEP Endorsed Course* logo to demonstrate that a particular course has earned IIBA's endorsement and automatically qualifies for PD Hours/CDUs toward IIBA certifications.



## Available Stream Add-ons (additional purchase required)

<b>Business Data Analytics Stream</b>	<ul style="list-style-type: none"> <li>• License to utilize the <i>Guide to Business Data Analytics</i> in developing training</li> <li>• CBDA exam learning objectives</li> <li>• Pathway toward endorsement of CBDA-aligned courses</li> <li>• Discounts on bulk purchase of memberships with CBDA exams. (Minimum 10 memberships and 10 exams)</li> </ul>	<b>+ \$750 add-on/year</b>
<b>Cybersecurity Analysis Stream</b>	<ul style="list-style-type: none"> <li>• License to utilize <i>Cybersecurity Learning Modules</i> in developing training</li> <li>• CCA exam learning objectives</li> <li>• Pathway toward endorsement of CCA-aligned courses</li> <li>• Discounts on bulk purchase of memberships with CCA exams. (Minimum 10 memberships and 10 exams)</li> </ul>	<b>+ \$750 add-on/year</b>
<b>Product Ownership Analysis Stream</b>	<ul style="list-style-type: none"> <li>• License to utilize the <i>Guide to Product Ownership Analysis</i> in developing training</li> <li>• Pathway toward endorsement of CPOA-aligned courses</li> <li>• Access to CPOA Course Accelerator package (Lesson plan, CPOA learning objectives, question bank, image bank, etc.)</li> <li>• Instructor exam coupon</li> <li>• Discounts on bulk purchase of memberships with CPOA exams. (Minimum 10 memberships and 10 exams)</li> </ul>	<b>+ \$750 add-on/year</b>

## 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 trademarks and guidelines outlined on the [IIBA Logos & Trademarks](#) website, and within the EEP Terms and Conditions.

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.

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 will result in disciplinary actions, which may include discharge from the program.

Failure to comply with remedies of an infringement may result in 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.

## 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.

## 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*, 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 [eep@iiba.org](mailto:eep@iiba.org).

## Complaints against an EEP

Complaints received against an active EEP must include a name, email address, telephone number, and a description of the problem for investigative purposes. Complaints could result in an audit of the EEP.

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

EEPs found to be in breach of IIBA EEP Terms and Conditions and policies risk losing their affiliation with IIBA.

## Renewal Reminders

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

## Overdue EEP Renewal Payment

Overdue payments will result in the removal of an organization/endorsed courses from the IIBA website.

EEPs renewing 60 days beyond their account's renewal date will incur a late fee of \$250. **Payment in full must be received to be reinstated to the website.** The account's original annual renewal date will remain.

Accounts 90 days in arrears may not be reinstated and may need to reenroll in the EEP program.

## Lapsed EEP Membership

EEPs who are past due, or who withdraw from the program and who are not seeking reinstatement must remove all IIBA® EEP™ program logos immediately, remove licensed content from any courses, and cease to advertise their courses as being endorsed and as qualifying towards IIBA certification and recertification.

All questions, comments and feedback can be e-mailed to [eep@iiba.org](mailto: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. The course must also match or exceed the PD hour requirement an individual has to meet to sit for the exam.

**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

Webinars 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

The contact hours of an Endorsed learning event may qualify toward 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 an endorsed learning event to qualify towards the CCBA or CBAP professional development requirement, it must meet the following criteria:

1. It must be moderated/facilitated (i.e., there must be a moderator for the session, or a facilitator/instructor who leads the group/individual through the material). If the course is an online, self-paced learning course, students must have the ability to connect with a qualified instructor for support/questions.
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 to be assessed by the facilitator/moderator/learning management system.
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.