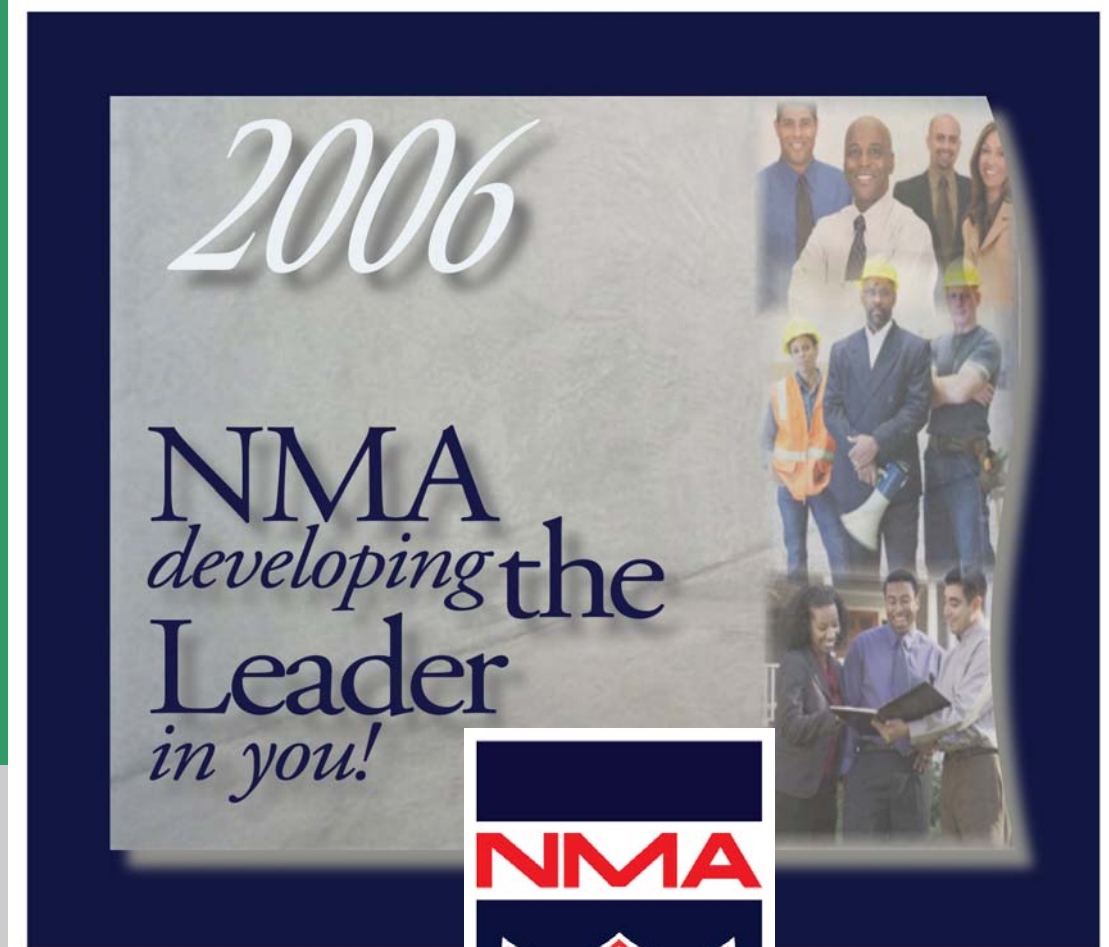


GUIDEBOOK



Professional Development Resources Guide

NMA.... THE LEADERSHIP DEVELOPMENT ORGANIZATION
BUILDING TOMORROW'S LEADERSHIP TEAM... TODAY!

CHAPTER LEADER TRAINING MATERIALS

***PROFESSIONAL DEVELOPMENT
RESOURCES GUIDE***

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Understanding the Professional Development Function

Professional growth through continuing education is the principal thrust of NMA. It is no secret that the success of an NMA chapter is dependent upon the effectiveness with which professional development is delivered to individual chapter members. For many chapter officers, there is a general recognition that the educational opportunities a chapter can offer do, indeed, constitute the backbone of the entire operation. The question then arises, “How do I implement a professional development plan?”

The NMA Chapter: *A Vehicle to Provide Learning Opportunities*

If an NMA chapter is to remain on the leading edge of management training and professional enrichment, then it must never allow itself to become obsolete. The greatest disservice to a company that an employee can render is to become out-of-date, complacent, and uninformed. The conscientious manager/leader is one who realizes that obstacles to personal and professional growth are often self-imposed.

Professional Development activities within a chapter must provide the proper environment for learning. If we view the chapter as providing the necessary vehicle for achievement, then we must accept our definition of “achievement” as encompassing what is learned through personal and professional development. The chapter cannot be all things to all people. Its scope must be broad enough to include each member, yet narrow enough to satisfy realistic goals and objectives.

True learning is the result of two factors: education and experience. A well-run management chapter can provide both of these opportunities. When one adds the benefit of leadership development, the breadth of possibilities for developing one’s personal and professional skills is staggering.

The reason a chapter offers an educational program, that is to say, its motive, is of critical importance. It can make or break the entire effort. Perhaps the chapter officers are engaged in providing training merely because the company has so directed. Maybe such opportunities are only an outgrowth of satisfying the requirements for an NMA award. Quite possibly, it becomes a desperation exercise—a feeling that the Professional Development Committee should do **something!** Most important is getting an early and up-front identification of the chapter’s motive. If that can be accomplished, many chapter leaders will maintain that everything else takes care of itself. To successfully implement a plan, you must recognize that the chapter can have a professional environment by using NMA resources, and it can present the best types of programs available.

The Professional Development Philosophy: *Meeting Members’ Needs*

For most of us, our past was spent in learning to do specific assignments. High school, college, and company indoctrinations were all geared basically the same—but career tracks change in life! Sometime in the future we find ourselves asked to assume some form of management responsibility. Suddenly, it is time to regroup and reevaluate. Technical proficiency can bring us only so far.

One of the first lessons managers learn is that there is a vast difference between doing work and having others do it for you. Managers need answers to problems every day—answers that are current and

immediately applicable. That dissemination of information, done in the professional atmosphere of a management chapter, can establish a growth pattern through retirement.

Chapter-conducted courses and programs are taught to an exclusive group of participants. Whether it's a community chapter or a company chapter, only certain personnel are involved. Members of the community chapters have a unique opportunity to share management philosophies from a variety of backgrounds. With individuals bringing various degrees of experience to the group, everyone's knowledge base of management fundamentals is enhanced.

For company chapters, on the other hand, chapter courses provide supervisors, managers, and others with a special vehicle for learning the same things at the same time. Your people must, out of necessity, work together as a team. Doesn't it make good sense that they should learn together as a team?

Creating a Professional Environment

It has been said repeatedly that an outstanding manager/leader is "someone who can get someone else to do something for him, because that other individual wants to do it." Think about that for a moment. To accomplish that end skillfully is almost an art! Unfortunately, there are no "short courses" or "magic formulas" for developing managers/leaders. It's a long-term, never-ending job...one that requires a positive, systematic effort and good control.

It is important, here, to differentiate between "management" development and "professional" development. While the two terms can be, and are, used interchangeably, the emphasis within NMA chapters will be on the latter. Managers have to grow as individuals. Abilities that are adequate today may not suffice tomorrow. Therefore, the growth and development of a management team must encompass more than "management" know-how. It must take the broader role—it must deal with the totality of needs, interests, and responsibilities of a truly "professional" manager/leader.

Establishing a Professional Development Program

The existence of an NMA chapter is a constant reminder that professional development is a continuous process. It shows the individual that it is up to him or her to bridge the gap from the kind of leader that individual is—to the type of professional he or she can be.

A chapter can release the inherent personal motivation to develop one's leadership abilities. That's the secret to personal development. It comes largely from within.

Setting Goals and Objectives

The key to a successful professional development operation is providing the correct environment for learning. That can best be accomplished by following three basic principles:

1. Setting goals and objectives
2. Developing a plan to meet them
3. Successfully implementing that plan

These are the same three elements that are recommended to all chapter officers. In fact, they are the same three that are universally accepted as the first three steps in any manager's daily business dealings. We are so accustomed to hearing them that they are in danger of being completely overlooked.

Assessing Individual and Parent Organization Needs

For the professional development people, there are two important tasks. One relates to company needs, and the other concerns the members' interests. In the first instance, we too often find that a chapter overlooks its responsibility for knowing its organization's needs, interests, and responsibilities. The chapter officers need to spend the necessary time to examine these three critical areas. Where are the weaknesses in the organization's training? What are the shortcomings? Rarely is there sufficient time or available resources for company training programs to "do it all."

A chapter's professional development activities should parallel and correlate with those programs being provided by the parent organization. Even in the most well-established businesses and industries, objectives and goals may radically and rapidly change. There is the obvious necessity to interrelate and integrate the chapter's professional development program with the organization or corporate philosophies, goals, and objectives. That kind of healthy relationship can only spell SUCCESS!

The second task of understanding the needs, interests, and responsibilities of the chapter members is tantamount to defining those of the organization. New techniques in management are being introduced daily. Certainly, few managers have the opportunity to keep currently informed completely on their own. The very success of an NMA chapter hinges on its voluntary nature. Therefore, it is imperative that its developmental offerings be responsive to its members' needs.

A variety of methods may be used to ascertain those needs. Some chapters rely heavily on survey information. A survey can be constructed to assess broad areas of interest, or it can be designed to indicate projected participation in specific courses or programs. In addition, interviewing a random sample of individuals can often give an accurate account of member needs. Face-to-face discussions and review of our catalogs can be beneficial in assessing the desires of the membership.

Perhaps the best advice NMA can offer is to urge that the chapter get in sync with the training department! The two major functions of any training division are nuts-and-bolts training and management coordination and development. While the former activity can best be left to the in-house organization, the latter can certainly be a joint effort. The wise training manager/leader will take advantage of this resource and use it to the maximum advantage.

The quickest method for soliciting input from the training folks is to include some of them as permanent members of the Professional Development Committee. This avoids overlap, confusion, and unnecessary duplication. NMA chapters have the talent and the manpower to step up the flow of information to the management team. Quite often, a harmonious relationship between the two can bridge the gap from where professional development is, to where it should be!

Developing the Professional Development Plan

In developing the chapter's professional development plan, use the goals and objectives you have established. The key to success is constructing a long-term curriculum in coordination with the overall long-term chapter direction. A well-planned and structured program attracts more participants. It lends greater credibility to one's efforts, and it allows students to organize their own schedules well in advance. Managers are busy people, and they need the opportunity to plan their personal and professional lives. A structured curriculum provides continuity and enhances the professionalism of the entire chapter.

Coordinated course offerings over the long term also create a goal-setting environment. NMA's Certificate in Management Studies, the Supervisory and Management Skills Certificate of Achievement, and other "rewards" take on added meaning in the context of an orchestrated development program.

Your curriculum should be developed around the growth stages of career managers so that there is an orderly progression of educational materials and experience levels available each year. While a structured curriculum provides a firm foundation for chapter educational plans, it must remain flexible enough to allow for changing local circumstances and needs. Your curriculum should include both NMA materials and courses that are developed in coordination with a local educational institution or a company training department.

Advance planning attracts qualified discussion leaders, too. Even the Certificate in Management Instruction becomes more widely sought. When coursework is planned ahead of time, these same facilitators are better able to get the instructional materials from NMA or whatever other source is being used. In addition, it becomes easier to create an awareness of how courses and monthly membership meeting programs can complement and supplement one another.

Implementing the Professional Development Plan

A continuous professional development plan provides professional enrichment for everyone concerned. A carefully-thought-out program connects and interfaces the individual member, the chapter, a nearby NMA council, and NMA. It is the bottom line for the world's largest society of professional management men and women.

Implementing it all is certainly a function of the Professional Development Committee. We shall discuss that role in the next section. But, a greater degree of success is realized when professional development becomes everyone's responsibility. First among the list is the member relations aspect. Every chapter newsletter should list current course offerings and "tease" members with those activities planned in the near future. Likewise, every monthly meeting presents an opportunity to remind attendees of such programs. Bulletin boards and meeting notices also serve as reminders.

Many chapters permit nonmembers to take courses offered by the chapter, usually for a slightly higher fee. If one accepts the belief that part of being a successful manager is recognizing and tapping future leadership talent, then the NMA chapter is the perfect vehicle to serve as a training ground. It helps spark the personal motivation to develop supervisory skills. That's the secret to personal development—it comes largely from within!

The ability for these dedicated folks and other more accomplished managers to show executive management their eagerness and willingness to achieve is undeniably important. For a whole variety of reasons, nowhere is executive liaison more important than in professional development. Whether it's upper management appointing an executive advisor to the chapter or whether it's handing a certificate for course completion to a chapter member at a monthly dinner meeting, executive management participation gives extra clout to your educational efforts. It should be a vital tool in implementing your plan.

How Do I Get Started?

Now that you understand the significant role which professional management activities must play in the chapter, where do you go from here?

Can you define your duties and responsibilities in one sentence? Let's try:

The Professional Development Chairman must direct the planning of his or her committee, work with the executive advisor(s) to the chapter, coordinate planned activities with any existing training department(s), and understand the developmental needs of the chapter members.

This Professional Development Resources Guide has been prepared to help you have a successful year. It should help you organize your program for the coming year, and it is intended to help answer your questions as they arise. If you are unable to find a solution to a problem or if you have suggestions for ways in which this guide can be made more helpful, please contact the Professional Development Division at NMA headquarters 937-294-0421.

The Professional Development Committee

If we accept the premise that the bottom line of a truly professional management association is that of providing quality management development opportunities for its members, then the enormity of that premise becomes readily apparent. Nowhere is there a greater need for a satisfactory return on the investment of time and money of the individual member. You, the Professional Development Chairman, must have help. Both in terms of workload and idea input, you will find the assistance of a first-rate committee to be invaluable.

Selecting a Committee

A dynamic, innovative, and representative Professional Development Committee is instrumental to the chapter's success. Quite naturally, the first step involves forming that committee. Try to draw your members from every department and division possible. What is important is not numbers but, rather, representation. The group should represent the greatest cross section of your chapter membership.

Choose those members who have shown interest in their own self-development. We have already mentioned the importance of attracting people from the existing training and/or personnel departments. Do you have a Certified Manager on your committee? That kind of education, experience, and credibility can be of great benefit.

The best way to select your committee is to search for those folks who, in the past, have participated in professional development courses sponsored by either the chapter or by the organization.

Once the committee is formed, it is time to arrange a meeting and review the professional development status quo. Where has the chapter been? What has it accomplished? Most importantly, where is it going? Continue with existing programs while beginning to lay the groundwork for future activities. Make sure that if the chapter is involved in NMA's awards program, the requirements for achieving the desired award(s) will still be met.

At this point, the committee should be examining the needs of the organization and its employees, as we discussed earlier. Get those down in writing. Be specific while maintaining flexibility. Review NMA's catalogs. We shall discuss their contents later in this guide, but it should suffice to say that they should become working documents. Every member of the Professional Development Committee should become familiar with the contents, at ease in locating courses and programs, and quick to recognize their importance to the overall developmental effort. The catalogs should be on the table at every officers' meeting. Many chapters have ordered additional copies from NMA headquarters. By the time new catalogs are mailed to the chapter, the old ones should evidence hard use!

Once the committee has determined the availability of courses, it should use this guide to examine other NMA programs. CEU (Continuing Education Units), certificate programs, NMA Educational Dividend, Certified Manager details—all these subjects are discussed. Once all your questions have been answered, the committee is ready to develop its long-range plan. You can now finalize a professional development curriculum and establish a schedule. Remember, too, that the NMA staff is available to answer any additional queries. Begin, then, to promote the final plan to the chapter membership.

Seven Steps for Success

If the chapter has an active and effective professional development program, it is very probable that the Professional Development Committee has incorporated seven very important steps for success.

1. "Link" courses to the "organization's way of doing business."
2. Report regularly to executive management.
3. Marry chapter goals to corporate goals.
4. Request executive involvement, e.g., ask an executive to be a guest speaker in a class.
5. Have training people on the Professional Development Committee.
6. Build a supportive relationship with the training department.
7. Offer courses that focus on professional development.

Types of Educational Resources Available

NMA Proprietary Materials

NMA professional development programs and courses are available in a variety of formats. They provide the chapter and its members a maximum opportunity to meet individual growth needs. It is important, however, to make the distinction between NMA “programs” and “courses.” “Programs” are activities planned a year or two in advance. They are usually brief. They might encompass the program portion of the monthly dinner meeting, or they might stand on their own as separate entities. Such an example might be a video followed by a discussion session. NMA “courses,” on the other hand, are a more formal activity—part of the chapter’s long-range planning. A series of educational meetings totaling at least four hours is one definition. Discussion is still utilized heavily. “Courses” might best be likened to “classes.” The real beauty of NMA courses and programs is that they are all designed to be put on in-house. Thus, they are a cost-effective alternative to expensive seminars and off-site instruction. Even those courses that are not NMA proprietary material are available to NMA chapters and members at a greatly discounted price from what the public would pay.

Using Non-NMA Courses and Programs

Are chapters expected to use only NMA materials? Of course not! Remember: NMA is not organized just to market courses and programs. Through funds set aside yearly in the NMA Educational Foundation, the Association is able to develop and market a limited number of materials. The sale of those enables NMA to derive non-dues income. Examples are the Supervisory and Management Skills Program; the Advanced Management Studies Program; *Principles of Managing*; the Leadership courses; and our short courses—*Taking Charge: Managing Careers in a Changing Workplace*; *Introducing Process Improvement*; and *Implementing Process Improvement*. As NMA grows and prospers, the additional monies received through more members, coupled with increasing sales of existing proprietary courses, will enable the Association to provide more cost-effective training aids.

Our chapters are encouraged to explore the vast outside market of quality educational materials. Your chapter is the ideal “vehicle” for administering such programs. Our catalogs list materials from companies, such as the American Management Association, Fred Pryor Seminars (CareerTrack), and Nightingale-Conant, that have made their resources available to NMA members. There are many other vendors selling educational materials. Consult your training department for further suggestions. Also, the Professional Development Division receives catalogs of educational materials from many vendors. Feel free to ask whether we can locate a course on a particular subject.

Conducting Courses — How to Develop Facilitators

Leaders/Facilitators for NMA Courses

All NMA courses and programs are designed so that they can be put on “in-house.” This kind of cost-effective training has been instrumental in the Association’s growth. While some chapters have sought out professional instructors from colleges and company training departments, that has been the exception rather than the rule. Experience has shown that NMA proprietary courses have been prepared so that discussion leaders can handle the material with limited preparation.

Finding Facilitators

Where are these facilitators? The answer, quite simply, is that they are everywhere. Every company has a cadre of qualified, capable, and experienced individuals who have the ability (and often the hidden desire) to professionally conduct an NMA course. A chapter of professional men and women can have almost unlimited potential in developing all kinds of personal and professional skills. Do not forget that leadership and instructional skills can also be developed through participation in NMA chapter activities. Some groups even draw upon their rolls of retirees for facilitators. Certainly that innovative approach recognizes the vast pool of talent and experience so close at hand. Consider asking a member of upper management to facilitate a course. This individual could provide insight on the subject from an organizational perspective.

Looking for the best clue to compile an instructional team? Ask! Never be afraid to ask a person to lead a course. Once that hurdle has been cleared, assembling that team is easy. One helpful hint: when asking for volunteers to lead a course, don’t ask someone to “teach” the class. Teaching implies special credentials/qualifications and suggests that such an individual has a knowledge base beyond that of his or her peers. It is less intimidating to be asked to serve as a facilitator than as a teacher.

Facilitator Training

The next step in developing facilitators is training them. Should the chapter not have the luxury of an already qualified group of facilitators, it is important to develop a plan to do so. NMA can help! NMA resources include *Facilitation Skills for Team Leaders*. It may be used as a self-study course but has the most value when done in a group setting in an eight-hour session. In addition, NMA offers *Learning Through Discussion*, an NMA course designed to train participants in the skills necessary to be a facilitator and an active participant. It can be put on in-house in only eight, two-hour sessions and benefits potential as well as experienced NMA facilitators. *Learning Through Discussion* highlights the NMA philosophy of group discussion learning and includes modules from some of NMA’s more popular courses. Like all NMA materials it is listed in our proprietary catalog. Among the chapters, the Certificate in Management Instruction is a popular reward for NMA facilitators. It publicly recognizes and thanks those facilitators who have worked arduously to provide capable guidance and instruction for NMA courses. This certificate is discussed more fully in the section “Certificates and Recognition.”

Criteria for Selecting Facilitators Outside of your Organization

From time to time you may be approached by “vendors” from outside your organization offering to conduct a course on some current topic for a nominal fee. In reality, they are often marketing a product as a part of their presentation. Many will deny that they have any vested interest other than the

opportunity to do their program. Occasionally, one might even imply that their course is sanctioned or approved by NMA headquarters. Although NMA may approve some of these seminars for CEU credit, this does not mean that NMA “sponsors” or endorses them. These vendors provide a useful service for the chapters, **but you are in the driver’s seat and must perform the quality control for your chapter’s programs.** It is up to you to screen, check qualifications, check references, interview presenters, approve content, obtain evaluations, determine appropriateness of fees, and generally monitor the quality of programming.

Financial planning, retirement planning, and estate planning seminars and workshops are just three programs which merit a little extra caution on your part. Although your chapter may use a disclaimer statement on promotional fliers, you might be well served by asking attendees to “sign in” at the session, signifying that they have read and understand the disclaimer. Participants may have registered over the phone, and this sign-in procedure ensures that they, too, have read and understand the statement. Be aware that some facilitators may offer out-of-chapter consultations after the fact, and care must be taken that neither NMA nor your chapter in any way endorses those activities. **Please see Appendix page A-3 for a disclaimer to use in advertising seminars on financial planning, retirement planning, estate planning, etc.**

It is helpful to develop a checklist for dealing with facilitators to enable you to reference key points that are important to successful programming. As the Professional Development Chairman, you will often personally deal with facilitators and the details relating to their presentation. But there are times when you will need to delegate this responsibility. A checklist can make that individual’s job easier. This list can serve as a training tool, memory jogger, and documentation when necessary. We have enclosed a sample on page 31. Feel free to copy or change it as necessary for internal use in your organization.

Understanding Key Terminology

Many Professional Development Chairmen are initially intimidated by certain terms which are connected with their new responsibilities. Learning Resource Center, CEU, Educational Dividend, Sponsored Speaker Program, Professional Development Award, ACE, Certificate in Management Studies, Certified Manager—these terms can seem a little confusing at first. It is important for NMA to remember that most chairmen are volunteering their time in order to perform a very important task. Most of them have little or no background in human resource development (i.e., training). Therefore, let's take some of these terms and examine them individually.

A term that has surfaced in the last few years in our Professional Development area is "Learning Resource Center" or "LRC." You'll find it on our home page, in the names of our catalogs, and hear it in conversation with other chapter officers and Directors. The following information may serve to clarify this term.

What Is the Learning Resource Center?

The idea for NMA's Learning Resource Center was an outgrowth of a thorough study of the training and development needs of our affiliated chapters and parent organizations. The LRC is the centerpiece of NMA's professional development operation and services our customers via three roles:

1. As a DEVELOPER of a limited number of comprehensive, cost-effective training and development materials
2. As a PROVIDER of many of the latest HRD courses and programs available on the open market
3. As a COMMUNICATION FACILITATOR through the network of NMA affiliates, enabling chapters and organizations to work together, share "best practices," and identify common solutions to shared problems

Through the Learning Resource Center, NMA members may keep a record of their continuing education, request transcripts to verify their professional development accomplishments, receive CEU for their effort, earn certificates of achievement in management studies, and possibly be eligible to receive college credit for completing selected NMA programs.

Through the myriad LRC offerings, NMA can show its chapters how to become value-added components of the parent organization or community. Chapters are encouraged to work hand-in-glove with trainers and HRD professionals to supplement and support ongoing company programs, goals, and objectives.

The Association's broader mission, through the chapters, is to serve not only the chapter members, themselves, but to become an increasingly valuable resource for upper management and training and development personnel.

Learning Resource Center Catalogs

There are two catalogs for the Learning Resource Center. We have the ***NMA Learning Resource Proprietary Courses Catalog*** that contains a complete listing of NMA-developed courses. Given is a description of each course, its length, number of CEU for which it qualifies, and purchase or rental prices. In addition, there is the ***NMA Learning Resource Vendor Courses Catalog***. It includes training materials developed by certain other companies with whom we have agreements. NMA sells these materials to its members, usually at a discount. NMA members must order through NMA's Professional Development Division in order to receive the discount.

Is There a Listing of Self-Study Materials?

Yes. The ***NMA Learning Resource Vendor Courses Catalog*** lists the self-study courses that we offer our members. They are strictly from outside vendors as NMA does not develop self-study material. Any chapter member may call the Professional Development Division and request a copy of this catalog for himself/herself. This publication serves as the catalog for NMA's Individual Members.

These catalogs are perhaps the most valuable resources for chapter professional development activities. If you have suggestions as to how we can improve these publications, please contact the Professional Development Division at NMA headquarters.

What Vendors May I Access Through NMA?

By ordering through NMA headquarters, members are eligible to obtain materials (most at special discounted prices) from the following:

- AMA (American Management Association)
- Nightingale-Conant
- Toastmasters

What Are CEU?

The Continuing Education Unit (CEU) is nationally recognized as a uniform unit of educational accomplishment by colleges, universities, and other adult education organizations. CEU are awarded to individuals who satisfactorily complete educational opportunities which meet stated criteria.

1. One CEU = 10 hours of study. That is, one CEU represents 10 hours of participation in an organized, continuing education experience under reliable sponsorship, capable direction, and qualified instruction.
2. Example: The Supervisory and Management Skills Program Course 1, *Introduction to Supervision*, is taught in seven, two-hour sessions—a total of 14 hours of work. Since one CEU is given for every 10 hours, then 1.4 CEU are given for the completion of this 14-hour course.

One of the most frequently asked questions regarding CEU is, may CEU be awarded for videos? The answer is a qualified YES. CEU credit cannot be given just for having people come in and view a video and then leave. There must be an introduction to the video (the types of things to be looking for, etc.), and then there must be a discussion about it. For example, a 30-minute video should entail approximately 1 1/2 hours of work. For CEU credit, a video by itself is not sufficient.

Are CEU awarded by ICPM for the Certified Manager preparatory courses? No, CEU for the three CM prep courses may only be awarded by NMA. ICPM is not an educational institution; it merely certifies that which has already been achieved.

What We Look for in Evaluating Courses for CEU

- There needs to be a statement of intended learning outcomes. Statements of what the learner is expected to accomplish as a result of the learning activity.
- It helps if the material is from a known source, such as an educational vendor. Generally, materials provided by a vendor where developed by an instructional designer and meet the criteria.

- The materials should include any of the following:
 - Questions and answers,
 - Discussion questions,
 - Case studies,
 - Demonstrations,
 - Simulations,
 - Games,
 - Written or oral examinations,
 - Written exercises,
 - Reports,
 - Projects,
 - Action plans.

- There must be interaction and discussion among the instructor and the students. It can not just be viewing a film or listening to a tape.

- The content must apply broadly to a general audience. The content can not be "How to be an NMA chapter president," but it can be "Leadership Issues." It can be "Interviewing and Hiring Practices," but it can not be "Hiring Policies at XYZ."

- The content generally should fall in five identified areas:
 1. Management Development, such as Leadership, Legal Issues, Performance Issues, Business Concepts, Financial Planning.
 2. Personal Development, such as Time Management, Work Life Balance, Presentations Skills.
 3. Team Development, such as Problem solving, Decision making, Brainstorming.
 4. Communications, such as Listening Skills, Report Writing, Newsletter Publications, Selling Your Ideas.
 5. Computer Software, such as Word, Database Management, UNIX, E-business, Net Meetings.

- Many others may qualify under a miscellaneous category. All you need to do to find out is just submit a B-4 form for the course.
 - There should be some type of participant evaluation at the end.
 - The course must be a least 1 hour in length; but has no limitation on the number of hours.
 - All NMA proprietary materials meet the criteria. All materials sold through NMA meet the criteria.

CEU Records

B-3 Form – Request for Authorization/Renewal to Grant CEU

Chapters wishing to grant CEU must apply to NMA in advance. To request authorization, simply photocopy **B-3 Form–Request for Authorization/Renewal to Grant CEU** (see Appendix), fill in the names of the Professional Development Committee. NMA headquarters will send the chapter a reply indicating that approval has been granted and stating the date. **A new B-3 Form must be submitted each year for a chapter to retain its authorization to grant CEU.** This is a very carefully-spelled-out requirement of the International Association for Continuing Education and Training (IACET), the organization that authorizes NMA to grant CEU. All CEU forms can be downloaded from the NMA home page. <http://nma1.org/forms>

All NMA proprietary courses have been assigned CEU values. These values appear in our catalogs, as does the course code. In addition, some of the vendor courses we list in the vendor catalog have been approved for CEU. The CEU value and course code also appear. You will need this information for the B-5 Form explained later.

B-4 Form – Request for CEU Approval for a Non-NMA Course

If you wish to grant CEU for courses from any other source—company training department, other professional training, etc.—it is necessary to fill out a **B-4 Form—Request for CEU Approval for a Non-NMA Course** (see Appendix) and send to NMA headquarters **before** the class begins. IACET now requires that participants demonstrate learning outcomes as one of the criteria for receiving CEU credit. For this reason, be sure to list the desired learning outcomes for the planned course. Send the completed form to the attention of the Professional Development Division at NMA headquarters. If the course is approved, you will receive a reply with an **assigned course code and CEU value noted on it**—very important information.

B-5 Form – Application for CEU and Student Certificates

To request CEU credit for the class participants, fill out a **B-5 Form—Application for CEU and Student Certificates** (see Appendix) and send to NMA headquarters. (Make certain that participants who want CEU attended 75 percent of the class hours and were able to demonstrate learning outcomes.) It is very important that the B-5 Form be filled out completely and legibly. **Be sure to include the course code and CEU value plus each participant's name and Social Security number.**

If nonmembers are to be granted CEU, there is \$1.00 charge each time credit is earned. Since NMA is a nonprofit professional organization, dedicated to serving its members, this charge helps defray the cost of maintaining CEU records for nonmembers.

NMA headquarters sends one computer-generated CEU certificate per class participant to the chapter to be given to the individual. If a second copy is needed for the employer, just indicate on the B-5 Form submitted to NMA that you need two copies. Many organizations place the second certificate in the employee's permanent personnel file.

There are two other items of interest regarding CEU:

- The Professional Development Division at NMA headquarters as per the IACET guidelines maintains a minimum 7-year file on student CEU. **Please see the NMA Security and Privacy Statements for CEU Records** (see Appendix).
- NMA will send a transcript of your CEU record to any school or organization you wish. Please send your request in writing.

Academic Hours vs. CEU

In addition to CEU courses, academic hours may be included in the permanent record at NMA headquarters. Academic hour credit will be given only for those university courses which are equivalent to the NMA Supervisory and Management Skills Program, Advanced Management Studies Program, *Principles of Managing*, or the Leadership courses. The student requesting credit must show by transcript and course description that the material was equivalent to the NMA course syllabus. A limited number of academic hours will count toward the Certificate in Advanced Management Studies (CAMS).

NMA Educational Assistance Programs

NMA Educational Dividend Program

Each NMA chapter is entitled to an annual credit for the purchase of selected materials. The amount of this credit is \$2.00 per chapter member reported to NMA headquarters at the end of our fiscal year (December 31). This credit may be used to purchase NMA proprietary educational materials at listed prices. Unused Educational Dividend does not carry over to the next year. Shipping charges are the responsibility of the chapter.

NMA Sponsored Speaker Program

One of the benefits of NMA affiliation is the popular Sponsored Speaker Program. Every NMA chapter in good standing is eligible to participate. In 1986, the Program was modified in order to meet the changing needs of member chapters. The new guidelines are as follows:

1. A Sponsored Speaker/Educational Dividend Reservation Form is mailed to each chapter every summer and must be returned to NMA headquarters by the due back date on the form. Sponsored Speakers are then recognized for the ensuing fiscal year, January 1 to December 31.
2. Each chapter selects its own speaker and schedules him or her accordingly. NMA no longer assigns Sponsored Speakers.
3. Each chapter requesting a Sponsored Speaker is reimbursed 50 percent of the cost of one speaker per year, up to a maximum of \$200. Reimbursement will be made upon receipt of the Sponsored Speaker Reimbursement Form plus a copy of the paid invoice or verification of the fee paid to the speaker.
4. Chapters electing not to request reimbursement for an NMA Sponsored Speaker may opt for an additional \$200 in Educational Dividend, i.e., a credit to be used against the purchase of materials. The Sponsored Speaker/Educational Dividend Reservation Form must be returned for a chapter to receive this additional credit.

NMA Chapter Professional Development Award

We encourage your chapter to participate in NMA's Chapter Recognition Program and to compete for the Professional Development Award. The activities suggested on the R-1 Form are a road map to having a successful Professional Development program

Chapter Professional Development Award

The Professional Development Chapter Award was developed to recognize those chapters (by size group) for outstanding efforts in Professional Development programming.

CHAPTERS NEED NOT SUBMIT A SEPARATE FORM FOR THE PROFESSIONAL DEVELOPMENT AWARD. You need only to complete and submit the Chapter Monthly Activity Report R-1.

A Professional Development Award will be presented to one chapter in each size group that earns the most points under the Professional Development and Certified Manager categories. Following is the criteria from NMA's Policy and Procedure Manual.

1013. PROFESSIONAL DEVELOPMENT AWARD

- a. **Description** - *This award is presented to any Chapter who meets the point requirements listed in section b, c, and e. A Chapter can have an outstanding Professional Development and Certified Manager Program through conducting both Association and non-Association courses, having an active Certified Manager (CM) program, and involving executive managers in the Professional Development program, whether as facilitators, reviewers of course material, or direct participation. All Chapters who have achieved the points required for the award will be recognized at the Association's National Conference.*

- b. **Qualifications** – *To be considered for this award, a Chapter needs to participate in the Association's Chapter Recognition Program by submitting a monthly Chapter Activity Report (R1 Form) to Association headquarters and achieving a minimum rating of Superior for activities conducted during their administrative year. In addition, Chapters must achieve enough points in both the Professional Development and Certified Manager categories (B1 and B6) to obtain an Outstanding rating in these categories.*
 - (B1) *Chapters in Size Groups 1,2,3,4 = 20 points minimum*
 - Chapters in Size Groups 5,6,7,8 = 15 points minimum*
 - 10% of the total points in Section B1 must come from items C and D (courses)*
 - (B6) *ALL Chapters: 5 points are needed*

In addition, a Chapter must submit the name of their Professional Development Chairperson AND must have a current B-3 CEU Authorization approval on file with the Association.

- c. **Nomination Submittal** - *The R-1 Form will be used by the Association staff to document and score Professional Development and Certified Manager Program activities. No other documentation is required.*

d. **Final Selection** - This award will be presented to qualifying Chapters that have met the requirements listed in section b and c above, and the number of combined points on the R1 Form in the Professional Development category and Certified Manager category listed in section e below. The Association staff will tabulate the points earned by qualified Chapters during their administrative year.

e. **Points Required** – Chapters with more than 50 members - .1 X *Membership figure + 50 = Minimum Points Required

*Membership figure is the number of paid members that have been reported to NMA as of the last day of the chapter's administrative year. A chapter with 75 members would need the following points to qualify for this award: $75 \times .1 = 7.5$ points

Chapters with fewer than 50 members – 35 points

American Council on Education

Review of NMA Courses

The American Council on Education (ACE) is an independent agency that reviews non-collegiate training courses and recommends the level of credit and the subject areas in which credit should be granted. The ACE publishes recommendations in *The National Guide to Educational Credit for Training Programs*.

The ACE reviewed NMA's Supervisory and Management Skills Program and *recommends* 9 hours of lower level baccalaureate/associate degree credit for completion of the entire program (140 hours of training are involved). The ACE recommendations begin on page 26 of this guide.

Some Tips for Obtaining College Credit

Obtaining actual college credit for these courses is a negotiation process which usually requires more than simply presenting the college with your course completion certificate. In some cases, you may have to convince the college that your non-collegiate coursework is equivalent to college courses in terms of subject content or quality. To do this, you should be prepared to discuss the content of your course(s), how it fits the college's curriculum, and how the ACE evaluation process guarantees academic quality. Although the ACE staff is available to give this kind of information to colleges, we have included a few tips that you may find useful in your discussions with college officials.

STEP I — DO YOUR HOMEWORK BEFOREHAND (KNOW WHAT FACTORS AFFECT A COLLEGE'S DECISION TO AWARD CREDIT)

Does Your Subject Area Fit?

Does the content of your course fit into your college's degree curriculum? For example, if your course was in computer programming and you are enrolled or about to enroll in a business degree program, does the business curriculum include programming? If so, does your course cover the topics required in the college course? If yes, be prepared to discuss how your course is a suitable substitute. If you don't know whether your course content fits, you should try to find out by reviewing the college catalog or other materials. The more information you have, the more likely you will be able to negotiate your request successfully.

Do You Have Academically Credible Information and Documentation?

Do you have course information and documentation (e.g., transcript and description) that are credible and academic in appearance? One reason colleges do not accept non-collegiate courses, is that these courses are not described in academic terms or schedules. Be prepared to show your college the academic course description published by the American Council on Education and an official transcript from NMA. Official transcripts should contain course titles, numbers, dates, length, location, and final marks. Also be prepared to briefly explain the ACE course evaluation process—that is, that the American Council on Education has brought in a faculty team to review and make appropriate college credit recommendations for NMA courses. If you need more information on this process, contact the NMA Professional Development Division.

What General Restrictions Does Your College Place on Outside Learning?

Most colleges set a limit on the number of credits they will grant for studies not completed on their campus. Find out what this limit is and whether you have already exceeded this limit with transfer credits from other sources. (Limits on transfer credit are usually stated in the school catalog).

STEP II — FIND OUT WHICH OFFICIAL AT YOUR COLLEGE MAKES THE DECISION TO AWARD CREDIT FOR TRANSFER COURSES

Now that you know how to discuss your situation, you must determine the proper person to approach at your college. Unfortunately, the appropriate person varies from college to college. It could be the chairperson of the department, which offers your degree program, a faculty transcript review committee, the dean in your academic area (e.g., engineering, business, arts and science), admissions officer, registrar, faculty advisor, etc.

For Enrolled Students

If you are already enrolled at your college, try contacting your faculty advisor or department chairperson and ask him/her to give you the name of the person in charge of granting credit for transfer courses. Because your courses are non-collegiate, don't be surprised if you run into some skepticism or resistance at first. If you have "done your homework" as described in Step I, you should be able to provide the rationale needed to overcome much of the skepticism.

For Un-Enrolled Students

If you are not yet enrolled at your local college, call the admissions office, tell them what degree program you are interested in, and ask for the name of the person who makes the decision about awarding transfer credit into that degree program. Because your courses are non-collegiate, don't be surprised if you run into some skepticism or resistance at first. Insist on finding out who the proper contact person is and then make an appointment with him or her. Be sure you have "done your homework" as described in Step I. If you go armed with the proper information, you will greatly increase your chances for acceptance.

STEP III — WHAT TO DO IF YOUR COURSES ARE REJECTED

Find Out Why

First find out the reason for the rejection. Is it because the course content does not fit into the curriculum and you have no room left for elective credit in your degree? Or, have you already reached the limit of transfer credits the college will accept? If the answer is yes in either case, it is unlikely you can do much without actually changing degree programs or colleges. If, however, the rejection is the result of a department or institutional policy not to accept any non-collegiate credit, you might want to consider writing a carefully-thought-out letter of appeal to the academic dean or provost at the college. (Be sure to address the issues in Step I.) In addition, you should contact the American Council on Education, College Credit Recommendation Service, One Dupont Circle, Washington, D.C. 20036, (202-939-9433) and ask for additional information on the ACE process.

Consider Your Alternatives

If the answer is still no, you have two final choices. One is, of course, to continue your degree application or studies at that college and forget about receiving credit for NMA's course. Your second choice would be to "shop around." Contact other colleges in your area for their policies on ACE courses or consider another alternative—external degree programs such as Thomas A. Edison State College or Excelsior College (formerly Regents College) of The University of the State of New York. Both programs recognize ACE evaluated courses as well as accredited college courses. This means you can still continue taking courses at your local college, if you like. For more information, contact Thomas A. Edison State College, 101 West State Street, Trenton, New Jersey 08608-1176, (609-984-1100), or Excelsior College, 7 Columbia Circle, Albany, New York 12203-5159, (888-647-2388), or via e-mail: <www.regents.edu>.



The Certified Manager Program

Sponsored by the Institute of Certified Professional Managers (ICPM)

As the recognition of professional certification continues to rise, more and more NMA members are obtaining CM certification to distinguish themselves in the field of management. The initials CM signify that an individual has attained a set standard of knowledge and skill in management, as demonstrated by successfully passing three CM assessment exams.

CM certification is a generalist certification targeted toward all types of managers in all fields. Over 10,000 certified managers bring recognition to CM certification worldwide. CMs benefit from a high level of management knowledge and skill, improved confidence, enhanced professional image and visibility, and increased employment opportunities and earning power. Certification is a stepping-stone in the career development of managers and a commitment to lifelong learning via recertification.

Getting certified is a simple 3-step process of:

1. Getting Trained
2. Getting Certified
3. Getting Recognized

Training is accomplished through self-directed or group study (administered by your NMA chapter). Training materials include 3 printed study manuals and an online learning center which offers chapter reviews, practice quizzes, and PowerPoint slides. CM Program content integrates the basic management functions of planning, leading, organizing, and controlling with personal and interpersonal skills.

Certification involves applying to the CM Program and meeting eligibility requirements for education and experience. A point system is used to evaluate eligibility and is detailed on the ICPM website at www.icpm.biz. Applicants that are deficient in one of the eligibility requirements (either education or experience), may take the CM exams as an "Associate CM". Full CM status is obtained when both eligibility requirements are met.

The three CM exams coincide with the three CM study manuals. They are titled as follows:

1. **MS I: Foundations of Management**
2. **MS II: Planning and Organizing**
3. **MS III: Leading and Controlling**

The CM exams are administered on demand in paper and computer-based formats. Exams are closed book, 2-hour timed exams consisting of 120 multiple-choice questions. It is recommended that exams be taken one at a time at the completion of study for each manual. Pass and No Pass results for computer-based exams are reported immediately upon completion of the exam and followed by a detailed feedback letter after the 15th of the month. Results for paper-based exams are reported by letter after the 15th of the month.

Recognition results from successfully passing the three CM exams. Management, co-workers, clients, and the entire business community will recognize your achievement by the initials "CM" after your name. New CMs receive a congratulatory letter, CM certificate, CM lapel pin, and copy of the ICPM code of ethics. CMs may also request a press release be sent to their local paper and letters of recognition be sent to top management and human resources.

The Chapter's Role in Promoting the CM

NMA strongly suggests that the CM Program become an integral part of the professional development of each chapter by:

- Advocating CM certification for all chapter members.
- Obtaining and distributing CM brochures.
- Scheduling CM information sessions.
- Administering a CM Program within their chapter.

Contact ICPM for additional information on how to start a CM Program.

About the Institute of Certified Professional Managers

The Institute of Certified Professional Managers is the world's largest certifying organization for the management profession. Founded by the NMA, the International Management Council, and management educators in 1974, ICPM has been certifying managers for over 30 years. ICPM is a business center of James Madison University located in Harrisonburg, Virginia. ICPM is governed by a Board of Regents. Its Executive Director is the Dean of the College of Business at JMU. ICPM is committed to raising the competency and professionalism of managers worldwide. For more information, contact ICPM at icpmcm@jmu.edu or 800-568-4120.

Rewarding Achievement through Certificates and Recognition

How important is recognition? It varies among individuals, but a little recognition can work wonders in an NMA chapter. Membership in that organization acknowledges to each person that he or she has the qualifications to be a manager/leader. It gives that individual a leadership identity which is recognized by the company, by NMA, and by the general public. He or she is a visible part of the team—with special skills and talents.

One way to highlight those talents is to reward professional achievement. In addition to the Supervisory and Management Skills Program Certificate, NMA has several other special certificates which signify specific accomplishments. (Certificates are pictured in the Appendix). They are designed to provide a sense of direction for individual educational growth. The requirements to earn them are structured to provide meaningful and substantial challenges to members who aggressively seek professional development. The entire process is built on the completion of strong management education and experience as measured by the Continuing Education Unit (CEU).

It is recommended that a member of executive management present these certificates. These pieces of paper represent professionalism at its best. Nowhere is executive liaison more important than in the area of personal and professional development. Recognition and teamwork go hand in hand in promoting the welfare of the company, the NMA chapter, and the individual member.

The Certificate in Management Studies (CMS)

This certificate is granted to NMA chapter members who have completed 20 CEU (**200 hours**) of study. It is awarded to help members maintain their motivation in the process of striving for personal growth in professional development. No enrollment is necessary to be a participant in the CMS program. The Certificate will be issued upon completion of 20 CEU. NMA members who believe they have accumulated 20 CEU may contact NMA headquarters for verification and then request that the certificate be issued. **No academic work may be used toward this certificate.**

The Certificate in Advanced Management Studies (CAMS)

The Certificate in Advanced Management Studies is actually a misnomer because NMA is now awarding a plaque for this achievement; however, the name of the program remains the same. The CAMS program was designed for those few persons whose outstanding effort and achievement in the study of management have earned them 50 CEU (**500 hours**) of credit. All work done towards the CMS applies to the CAMS as well, since it is an extension of the first program. Credit for 50 hours of academic work may be used for the CAMS. Credit will be given for only those university courses which are equivalent to the NMA Supervisory and Management Skills Program, Advanced Management Studies Program, *Principles of Managing*, or the six Leadership courses. The student requesting credit must show by transcript and course description that the material was equivalent to the NMA course syllabus.

1000-Hour Plaque

NMA's highest award for participating in chapter-conducted professional development courses is a handsome wooden plaque. It signifies that the recipient has completed 1,000 hours of training, 95 percent of which must be through an NMA chapter. Fifty (**50**) hours of academic credit may be applied toward the plaque. See the guidelines for credit mentioned in "The Certificate in Advanced Management Studies."

The Certificate in Management Instruction

The purpose of this certificate is to recognize and reward those persons whose hard work and dedication have been exemplified by their duties as course facilitators. These volunteers are among the chapter's most valuable assets. The Certificate gives notice that 100 or more hours have been devoted to instructing fellow managers with NMA courses and programs. It's the chapter's responsibility to notify NMA headquarters in writing when an individual has completed the necessary hours of instruction.

Supervisory and Management Skills and Other Certificates

Participants in NMA's Supervisory and Management Skills Program are eligible to receive an 8.5" X 11" Certificate of Achievement. It recognizes participation in each of the 10 courses offered. As individuals complete each course, they can affix a gold seal in the appropriate space on the certificate. Striving to get all 10 seals has been seen to be quite a motivator. Currently, these certificates are shipped on request at a cost of only \$2.00 per certificate. Calligraphy is the responsibility of the chapter.

In addition, blank CEU certificates are available to recognize completion of courses carrying CEU credit and may be used at the chapter's discretion. They are available from NMA for \$1.50 each.

For chapters wishing to thank an instructor for facilitating a course, there is the NMA Course Facilitator certificate. These are available at no charge from NMA headquarters.

NMA headquarters now has the capability of creating customized certificates. Please contact the Professional Development Division in Dayton for details.

Just a reminder: the chapter has the responsibility for printing names, dates, etc., on these certificates. Most companies have the capabilities to print certificates and other documents.

Ordering Courses

As stated earlier, the successful implementation of your professional development program takes planning. Besides adding credibility and professionalism to your efforts, it enables you to concentrate on important details. Ensuring that you have the proper tools on hand and in time is absolutely essential. As Professional Development Chairman, it is your responsibility, to see to it that all course materials are ordered far enough in advance. We request that all chapters be current in their dues in order that we may offer courses and programs at a discount price.

Ordering NMA and Non-NMA Courses

Both proprietary (NMA) and non-NMA courses may be ordered through the Professional Development Division at NMA. You may place your order by calling, faxing, or writing. Requests, placed early in the day, allow us to expedite your request.

Normally, NMA courses can be shipped within 72 hours of the time you place your order. NMA uses United Parcel Service that has an estimated three to seven working day delivery time. Your best planning should allow for 10 days between ordering NMA materials and their receipt. (West Coast chapters should allow at least two weeks.) Remember, too, mail processing in your organization can create its own problems. NMA ships rush orders by UPS Next Day Air or Blue Label (Second Day Air)—both of which are relatively expensive. Since the chapter pays for all shipping, proper planning helps you control costs.

If the course you are ordering is a non-NMA program listed in the *NMA Learning Resource Center Vendor Courses Catalog*, plan on four to six weeks before the material arrives. Even though we immediately forward your order and request drop shipment, NMA has no direct control over these outside vendors. Please bear this in mind when doing your planning.

Returns Policy

Occasionally, chapters order more materials than they eventually need. Class size for professional development courses can change dramatically at the last minute. We suggest that unused materials be stored in your chapter's professional development library until such time as the course is offered again.

Any returns made to NMA must meet the following criteria:

1. To receive full credit, chapters must return books within 60 days of the invoice date. Please allow one week for shipping, as NO exceptions will be made.
2. All orders over \$250.00 or older than 60 days are subject to a restocking charge of 20 percent of the invoiced price. Returns must be received by NMA not later than 12 months from purchase date.
3. Books **MUST** be received by NMA in saleable condition. Books with bent covers, scratches, or broken spines will not be accepted for credit under **ANY** circumstances.
4. Videotapes (except demonstration and rental materials) are **NOT** returnable unless they can be proved defective upon receipt. Please notify NMA of any such defect within 10 days of invoice date.

A Final Note – *Professionalism*

That's a key word to the basic NMA premise. Professionalism is more than education. It's more than experience, more than training. It's a state of mind. It's a combination of skill and dedication that an NMA chapter can foster.

As managers/leaders become more professional and more effective, they raise the performance level of the whole organization. They raise the sights of people—their own as well as that of others. As a result, the organization not only becomes capable of doing better, but as Peter Drucker writes in *The Effective Executive*:

It becomes capable of doing different things and of aspiring to different goals. Developing professionals challenges directions, goals, and purposes of the organization. It raises the eyes of its people from preoccupation with problems to a vision of opportunity, from concern with weakness to exploitation of strengths. This, in turn, wherever it happens, makes an organization attractive to people of high ability and aspiration, and motivates people to higher performance and higher dedication. Organizations are not more effective because they have better people. They have better people because they motivate and encourage self-development through their standards, their habits, and their climate. And these, in turn, result from systematic, focused, purposeful self-training of the individuals.

The purpose of this guide has been to familiarize you with some of the basics necessary to implement a professional development plan successfully in your chapter. Like any activity, it does take work. Please do not go it alone. NMA and the Professional Development Division stand ready to assist you. Your goal is to provide a vehicle for achievement. Ours is to make that task less formidable. Remember, the manager/leader who prepares himself or herself for future job requirements is making one of the most important contributions that can be made to economic growth.

American Council on Education Credit Recommendations

NMA is one of the oldest and largest organizations espousing management as a profession and the personal and professional leadership development of the manager. Founded in the early 1900s at the Dayton Engineering Laboratories Company by the famous inventor, Charles Kettering, it became the National Association of Foremen in 1925. In 1957 the name was changed to The National Management Association.

The NMA has affiliated chapters throughout the United States. The organization is committed to bringing its members the latest state-of-the-art thinking in management training through its professional development course materials. To enhance managerial interactions, all course materials are prepared with a complete discussion leader guide to be used in a group discussion learning format.

Source of official student records: NMA Professional Development Division, 2210 Arbor Boulevard, Dayton, OH 45439-1580

Additional information about the courses: College Credit Recommendation Service, American Council on Education, One Dupont Circle, Washington, D.C. 20036

Supervisory and Management Skills Program

(Formerly First Line Supervisor Program)

Course 1 – Introduction to Supervision

Course 2 – Management Principles

Course 8 – Leadership Development

Location:	Nationwide
Length:	<i>Version 1:</i> 42 hours (21 weeks); 2 hours of precourse work <i>Version 2:</i> 42 hours (21 weeks); 3 hours of precourse work
Dates:	<i>Version 1:</i> September 1980 – December 1999 <i>Version 2:</i> January 2000 – Present
Objective:	<i>Versions 1 and 2:</i> To develop an understanding of the supervisor's role within the organization or environment, to develop an understanding of the basic principles of management, and to develop an understanding of supervisory leadership
Learning Outcome:	<i>Versions 1 and 2:</i> Upon successful completion of this course, the student will be able to develop and exercise basic managerial and leadership skills, apply basic managerial principles, understand the leadership role and how a supervisor functions as a leader.
Instruction:	<i>Versions 1 and 2:</i> Major topics covered in the course are the supervisory setting and the role of the supervisor as leader, problem solver, and person; the organization as a system within which the classic management functions of planning, organizing, directing, and controlling are performed; and the environment of the supervisor and his interpersonal and organizational role. Methods of instruction include videotapes, lectures, role playing, quizzes, situational problems, reading assignments, and pretest/post-test.

Credit

Recommendation: *Versions 1 and 2:* In the lower division baccalaureate/associate degree category, 3 semester hours in Supervisory Management (8/83) (7/00)

Supervisory and Management Skills Program

(Formerly First Line Supervisor Program)

Course 3 – Communication Skills

Course 4 – Interpersonal Relationship Skills

Location: Nationwide

Length: 28 hours (14 weeks); 2 hours of precourse work

Dates: July 1981 – Present

Objective: To provide the supervisor with knowledge and skills in order to increase his understanding and effectiveness in communicating both verbally and nonverbally

Learning Outcome: Upon successful completion of this course, the student will be able to resolve communication problems, develop oral and listening skills, read and write effectively, conduct meetings and presentations, handle conflicts and interpersonal relationships, work effectively with groups, and build effective working relationships with subordinates, peers, and supervisors.

Instruction: Major topics in the course are the basics of communication and working with people, oral and written communication, handling meetings and conferences, and dealing with written and oral communication in an organization. Methods of instruction include discussion, classroom exercises, case studies, team exercises, role playing and critiques, audio/visual materials, learner presentations/reports, tests, quizzes, and a final examination.

Credit

Recommendation: In the lower division baccalaureate/associate degree category, 2 semester hours in Business Communications, Communications, Human Behavior, or Interpersonal Dynamics (8/83) (12/96)

Supervisory and Management Skills Program

(Formerly First Line Supervisor Program)

Course 5 – Developing Performance

Course 6 – Challenge of a New Employee

Course 7 – Coaching and Counseling

Location: Nationwide

Length: *Versions 1 and 2:* 42 hours (21 weeks); 3 hours precourse work

Dates: *Version 1:* July 1982 – December 1999
Version 2: January 2000 – Present

Objective: *Versions 1 and 2:* To provide participants with an introduction to contemporary principles & practices of hiring, developing, and maintaining productive employees.

Learning Outcome: *Versions 1 and 2:* Upon successful completion of this course, the student will be able to equip people with the skills and concepts to be able to evaluate the work performance of individuals and systems.

Instruction: *Versions 1 and 2:* Major topics covered in the course are hiring, orientation, and training of new employees; the development and implementation of personnel management systems; and the role of counseling as a corrective strategy. Methods of instruction include videotape cases, classroom discussion, individual/team exercises, readings, and pretest/post-test.

Credit

Recommendation: *Versions 1 and 2:* In the lower division baccalaureate/associate degree category, 2 semester hours in Personnel Management (8/83) (7/00)

Supervisory and Management Skills Program

(Formerly First Line Supervisor Program)

Course 9 – Business Concepts

Course 10 – Law for the Layman

Location: Nationwide

Length: *Versions 1 and 2:* 28 hours (14 weeks); 2 hours of pre-course work

Date: *Version 1:* January 1983 – December 1999
Version 2: January 2000 – Present

Objective: *Version 1:* To provide supervisors with an understanding and a working knowledge of business, legal concepts, and practices. *Version 2:* To provide supervisors with an introduction to and a working knowledge of a business's structure, the economic environment in which it operates, legal concepts, and practices

Learning Outcome: *Versions 1 and 2:* Upon successful completion of this course, the student will be able to understand business organizations and the economic system, utilize the firm's management information system, adapt to organizational change, and understand the legal system and its impact on business.

Instruction: *Version 1:* Major topics covered in the course are economic systems, management information systems, financial management systems, quality and productivity, the changing business world, employee and employment law, and government regulations. Methods of instruction include lecture, discussion, videotapes, case studies, and pretest/post-test. *Version 2:* Major topics covered in the course are economic systems, forms of business organization, management information systems, financial management systems, quality and productivity, the changing business world, employee and employment law, contracts, the uniform commercial code, torts, and government regulations. Methods of instruction include lecture, discussion, videotapes, case studies, and pretest/post-test.

Credit

Recommendation: *Versions 1 and 2:* In the lower division baccalaureate/associate degree category, 2 semester hours in Management or Business Administration (8/83) (7/00)

Appendix

NMA Security and Privacy Statements for CEU Records

Privacy Statement

NMA is committed to maintaining your confidence and trust. This policy establishes how we will use the *Continuing Education Unit (CEU) or personal information* recorded in the NMA CEU database. The privacy of our members is of utmost importance to NMA.

Basic Confidentiality Policy

- It is the policy of NMA that CEU and personal information (such as your name, Social Security number, postal and e-mail addresses, telephone number, etc., stored in the NMA CEU database) is private and confidential.
- The information will be kept in a secure location accessible only by NMA staff, and will be used only for the purposes for which you provided the information.

No Release of Information to Third Parties

NMA CEU database information will not be released to third parties except to further the purpose for which you provide the information, such as forwarding your request for a CEU transcript to an appropriate party for action, or if release is required by law or is pertinent to judicial or governmental investigations or proceedings. There are no other circumstances under which we will provide information to third parties. For example, if you need an official transcript of your CEU records sent to your employer or college, you need to make the request in writing. Only after receiving your written authorization will the transcript be sent. A member has the right to review and inspect his or her CEU records at any time.

Security Statement

Any NMA CEU database information provided to us from the chapter or a member resides in the NMA CEU database on a computer system operated only by NMA or in our hard copy file system. The Information System (IS) is an internal computer system and can be accessed only by NMA staff. It has no access from the Internet or any other computer system except NMA's. The hard copy system is maintained and accessed only by the Professional Development and IS staff.

Facilitator Checklist



Name _____ Program/Class _____

- Qualifications (attach relevant documents, i.e., bio, resume, brochure, transcripts)
- References (attach list of names, phone numbers, date contacted)
- Discussion leader or facilitator training completed
- Give class and room assignment
- Review policy on sale of products during or after class (appropriate with "Give class and room assignment").
- Prepare and execute any agreement or paperwork with facilitator outside organization.
- Show attendance policy for CEU credit (in NMA leader guides).
- Give leader material(s) at least two weeks in advance.
- Discuss the demographics of the course participants and the size of the group.
- Give facilitator the class roster form for CEU (B-5 Form).
- Give leader welcome letter.
- Discuss the process used to cancel class if emergency arises.
- Give facilitator your phone number and/or business card.
- Ask for list of equipment needed or instruct facilitator on how to handle.
- Review class notification and promotional materials with facilitator for accuracy and political correctness (especially appropriate with facilitator outside the organization).
- Review pay or fee structure, the payment process, necessary forms, and expected dates of payment.
- If paid facilitator, start payment process.
- Give name tags or name card tents for first meeting.
- Review any policy or arrangements for refreshments.
- Meet with facilitator after first class to evaluate need for changes.
- Obtain and complete recognition certificate for facilitator.
- Give facilitator course evaluations (NMA materials have evaluations on the last page of the participant manuals).
- Other
- Personally thank and publicly recognize facilitator's efforts.

Suggested Disclaimer for Financial Seminars

This seminar is a no-obligation, educational and informational opportunity for you. Your participation is totally optional. You are under no obligation to purchase any products or services from the firm presenting this seminar. By offering you this seminar, NMA does not make or imply a recommendation or endorsement of the firm presenting the seminar, nor any information, products, or services that they may recommend to you after the seminar, should you decide to become a client of their firm.

NMA, by making this seminar available to its members, makes no representations or warranties (express or implied) about the quality or accuracy of the information contained in the seminar materials or offered by the instructors. Because NMA has no expertise in the subject matter covered in the seminar, it had no role in selecting the instructors involved or the materials and information disseminated. For the same reason, NMA is not in a position to endorse the reliability of the information provided by the seminar instructor or contained in the materials disseminated.

Certificates Available Through NMA



**Supervisory and Management Skills
Program Certificate
sms300**

11" X 8.5"

\$2.00



**Supervisory and Management Skills
Completion Certificate
sms351**

11" x 8½"

\$1.00



**Advanced Management Studies Program
Certificate
ams0300**

11" x 8.5"

\$2.00



**Advanced Management Studies Program
Completion Certificate
ams0350**

11" x 8.5"

\$1.00



**Course Facilitator
Certificate**

11" x 8½"

Issued by NMA Headquarters



FaciliSkills Program Certificate

11" x 8.5"

Issued by NMA Headquarters



**Management Studies Plaque
200 Hours**

11" x 8½"

Issued by NMA headquarters



**Certificate in Management
Instruction**

11" x 8½"

Issued by NMA headquarters

2005 Authorization to Grant CEU (B-3)

Approval period: January _____ - December _____

//-->

Person Submitting Form:	
Name:	
Phone:	
E-mail:	

Chapter Information:	
Name:	
Number:	
Date:	

<i>Professional Development Team</i>	
Professional Development Chairman information:	
Name:	
Phone:	
E-mail Address:	
CEU records will be handled by:	
Name:	
Phone:	
E-mail Address:	
CEU Certificates should be shipped to:	
Name:	
Address:	
Address:	
City:	
State:	
Zipcode:	
Course ordering will be handled by:	
Name:	
Phone:	
E-mail Address:	

We wish to use our Sponsored Speaker funds for this administrative year for:
(Check one only)

A Sponsored-Speaker

\$200 additional Educational Dividend

Chapter's Year-End Goal

Please indicate, in the blank provided, the number of expected courses/ workshops from the list below.

Our Chapter's year end goal is to offer:

Supervisory and Management Skills Courses

Certified Manager Courses

"Lunch and Learns" - One hour courses over the lunch hour

Half-Day Seminars or Workshops

Full Day Seminars or Workshops

Chapter Leadership training (at the Leadership Development Conference, Council Meetings, Transition training, or Mini-Leadership Development Conferences.)

Other

Professional Development Activities

Our plan is to provide training or professional development activities in the following areas:
(Check yes to all that apply.)

Personal Development- courses such as presentation skills, balancing work and home life, retirement planning, and any other course targeted to the individual skills.

Team Development- courses such as working in small groups, group decision making, team building, and any other course that covers working in groups.

Management/Leadership Development- courses such as *Challenge of a New Employee*, managing for performance, and any other course that covers leading or managing a group of individuals.

Communications- courses such as *Spanish for Work*, writing for business, listening skills, electronic communications, publishing, or any other course that covers any communication skills.

Computer Software- courses that teach how to use MS Word, MS PowerPoint, Unix or any other course that covers computer skills.

Other courses not listed above:

Size of Chapter's Professional Development Program

We plan to serve the total number of participants this year: (Check only one.)

<input type="checkbox"/>	10 to 50 participants
<input type="checkbox"/>	51 to 100 participants
<input type="checkbox"/>	101 to 200 participants
<input type="checkbox"/>	201 to 500 participants
<input type="checkbox"/>	501 to 1000 participants
<input type="checkbox"/>	More than 1000 participants

Chapter's Focus

Yes	No	Our chapter's focus for the coming year will be: (Check yes for no more than two)
<input type="checkbox"/>	<input type="checkbox"/>	market our program more actively
<input type="checkbox"/>	<input type="checkbox"/>	use the most qualified instructors
<input type="checkbox"/>	<input type="checkbox"/>	attract more participants
<input type="checkbox"/>	<input type="checkbox"/>	control our costs, so that we can serve more participants
<input type="checkbox"/>	<input type="checkbox"/>	provide more recognition for our participants and instructors
<input type="checkbox"/>	<input type="checkbox"/>	involve top management more
<input type="checkbox"/>	<input type="checkbox"/>	other

Please double check information above before submitting.

Thank you for submitting your Chapter's Authorization To Grant CEU.



Request for CEU Approval for a Non-NMA Course (B-4 Form)

Course Name:	Total Classroom Hours:
Facilitator's Name:	Starting Date:
Chapter Name:	Chapter Number:

Information about the course:

What format of course materials will you use? Vendor: _____

<input type="checkbox"/> Seminar	<input type="checkbox"/> Company-sponsored Course
<input type="checkbox"/> Audio-based Course	<input type="checkbox"/> Self-Study Course
<input type="checkbox"/> Video-based Course	<input type="checkbox"/> Computer-based Course
<input type="checkbox"/> Other _____	

Brief Outline of Course Content

Learning Outcomes: (A brief explanation of what effect you expect from the training, for example, to be able to speak in front of groups with confidence.)

Send Approval To:

Name:	Phone:
Company:	Mail Code:
Address:	City/State/Zip:

Send To:

NMA Professional Development
 Division
 2210 Arbor Blvd
 Dayton, Ohio 45439-1580
 Tel: 937-294-0421
 Fax: 937-294-2374

If you have any questions or need additional information, call NMA Headquarters at 1-937-294-0421.

