

ASSURES CLIENTS OF SKILLS

REVIEW OF KNOWLEDGE

CONSISTENCY OF SERVICES

CONTAINS TRAVEL COSTS

REDUCES TIME FROM OFFICE



APPLIED IMMEDIATELY TO JOB

PROVIDES LIFELONG LEARNING

FEE FITS MOST BUDGETS

UNIVERSITY GRADUATE CERTIFICATE

FULFILLS ACCREDITATION CRITERIA



## ***Welcome to CBA training!***

Competencies can become obsolete quickly with the swiftly changing economies and technologies rampant in today's world. Several articles posted on Google claim that by the time the ink is dry on our college or graduate degree, new and better business principles and practices, not to mention technologies, have already emerged making some of what we learned obsolete. Therein lies the importance of continuing education!

And the reason behind the Certified Business Advisor® program! The purpose of this Certified Business Advisor® (CBA®) program is to provide assurance to our clients that all business advisors in Ohio's SBDC network have the business skills, competency, and knowledge to effectively counsel the small business client. Accordingly, the CBA® program was designed to provide more advanced, graduate-level training on those topics most needed by small business owners-- accounting/finance, marketing, and human resource management. CBA® also establishes continuity and consistency in service delivery regardless of the area or location by requiring **all** of the Ohio SBDC Advisors—regardless of their education and experience level—to successfully complete the program.

Another factor that makes CBA® unique is that it was and continues to be the only SBDC in the country that partners with a third-party institution of higher education to administer the program. It is the university—in this case, Kent State University--that awards the certification. Kent State is one of the fewer than 1% institutions worldwide that have dual accreditation in both business management and accounting. Its instructors have a wide breadth and depth of industry experience, and most importantly, can easily relate concepts to relevant workplace scenarios, making the concepts taught more real for candidates!

Following certification, the program further engages in a continuous goal-setting process by requiring an annual minimum of 20 hours of continuing education to maintain the skills required to meet the ongoing business development demands.

We hope you find this training as rewarding an experience as have past graduates. An SBDC colleague wrote:

- 1. My greatest weakness as a Management Consultant with the SBDC was my lack of marketing experience. Not long after I completed the marketing section of CBA, I consulted with a client who was struggling in her business. As we analyzed her marketing methods, we began segmenting her market and found she was not even marketing to her target market.*
- 2. Last week I was asked about a target salary range for a specific type of employee. I was able to refer the person to O\*Net Online, as suggested in the CBA materials.*
- 3. I worked with two different clients who were already in business but struggling. Using the horizontal and vertical analysis of their recent financials, I could show them some of the negative trends that were creating their fiscal issues.*

-- *Stephen A. Heil, Management Consultant*  
*University of Kentucky Small Business Development Center, Elizabethtown*

We look forward to your joining our elite corps of Certified Business Advisors®!

Best regards,

A handwritten signature in blue ink that reads "James A. Laipply". The signature is fluid and cursive.

James A. Laipply  
State Director  
Ohio Small Business Development Center Program



## PURPOSE

The Certified Business Advisor® program is an eLearning certification program especially designed for professionals who advise small business owners.

CBA® is designed for maximum on-the-job performance, and provides assurance to clients and partners that its graduates have the business skills, competency, and knowledge to effectively counsel, guide, and inform entrepreneurs.

## BENEFITS

*CBA® is beneficial for any business professional who counsels and informs potential and existing entrepreneurs because it:*

- ✓ provides **assurance to clients** and funding partners that the Business Advisors has the business skills, competency and knowledge to effectively counsel, guide and inform entrepreneurs;
- ✓ serves as a **review** of knowledge obtained through education and experience. CBA® is, in essence, a proficiency exam, and reaffirms the Business Advisor's knowledge in business basics;
- ✓ **establishes a baseline for continuity and consistency in service delivery** regardless of the location;
- ✓ **contains travel costs and reduces time away from the office;**
- ✓ is **designed to be applied immediately in the workplace**. CBA® candidates can integrate the material into their jobs while learning instead of waiting until the class ends. Work and learning become one and the same;
- ✓ **answers the need for lifelong learning**. CBA® provides a framework for continuing professional development by requiring additional continuing education annually to maintain certification;
- ✓ **meets the criteria for professional development certification training** as required by the U.S. Small Business Administration (SBA) and the national America's SBDC (ASBDC) association.

## CONTENT/COURSE DESIGN

The objective of CBA® is to serve as a **review** of the Business Advisor’s knowledge in business basics, although the candidate may find some of the information new given our rapidly changing world. The CBA® program is a graduate-level program, taught by graduate-level professors, and is comprised of three (3) courses:

- (1) Human Resource Management,
- (2) Marketing, and
- (3) Accounting/Finance.

Each of these courses has multiple topical sessions with exams. The courses can be taken individually for a “Certification of Completion” in that topic area, or all three (3) for a Certified Business Advisor® certificate, and the ability to include the CBA® designation on stationery and business cards.

### HUMAN RESOURCE MANAGEMENT

#### Sessions:

Introduction to HRM (the changing HR environment, legal issues)  
Affirmative Action Debate  
Staffing (Recruitment and Selection)  
eRecruiting Debate  
Ensuring Positive Performance  
(Training, Performance Management, Compensation)  
Union Debate  
Gender and Pay Debate

Each session has an exam.

### MARKETING

#### Sessions:

Introduction to Marketing  
Strategic Planning, Marketing Plan  
Market Research, Feasibility Studies,  
and Sales Forecasting  
Customer Relationship  
Marketing and Consumer Behavior  
Market Segmentation, Market  
Targeting, and Positioning  
Product Management  
Promotion Management  
Pricing Management  
Place Management

Each session has an exam.

### ACCOUNTING/FINANCE

#### Sessions:

Business Entities  
Business Planning  
Financial Statements  
Financial Statement Analysis  
Financial Projections and Cash Flow  
Analysis  
Managerial Accounting  
Sources of Financing  
Cost of Capital and Capital Budgeting  
Valuation

Each session has an exam.

## TIMELINE

- The time it takes to complete each course (or all three courses) depends on the individual candidate’s background and the knowledge they already have in the subject.
- Each course is divided into sessions with an evaluation occurring after each session.
- Usually the accounting/finance module takes the longest depending on a participant’s mathematical ability. It is suggested that the candidate start with the human resource course, then marketing, and last accounting/finance.
- It is estimated that it takes about 20 hours per course.
- CBA® candidates have one (1) year to complete CBA®. This deadline can be extended for one more year, if needed. **NOTE: Ohio SBDC CBA® candidates must complete CBA® six months from their employment start date.**

## GRADING

- Each course has a series of sessions and accompanying exams (see above).
- A candidate needs to pass a session before s/he can move on and take the exam for the next session in a given course. This prevents inaccuracies from being perpetuated in future exams.
- The exams will be graded within 10 business days or sooner (barring any technical issues or absences, e.g., vacations, illness). This 10-day period allows the professors to attend to their campus students.
- There is no one overall grading rubric. Since the topics in each course are distinctive from one another, a one-size-fits-all grading rubric could not equally apply to all three. With the revised CBA<sup>®</sup>, each professor will indicate what s/he is looking for in grading each session depending on the type of “examination” used in that session. At least some of the session examinations in each course will be essay exams.
- To pass the course, you will be required to have an **overall average minimum grade of 80% for the course, and no session grade below 70%** which is the usual level for a graduate course.
- If you receive a grade of less than 70%, a retake exam is necessary and must be taken before you are allowed to take the next exam or continue to the next course. This makes it easier for you to learn, understand, and retain the concepts being taught rather than waiting until completion of the course. It is also easier for you to increase your grade this way.
- NOTE: Each participant will be allowed to **retake one session exam in each course at no charge**. If more than one retake is required, the CBA<sup>®</sup> candidate will need to register again for that course and pay the course registration fee of \$500.

## PROCESS (also see *15 Steps to CBA<sup>®</sup> Success*, p. 9)

For those registered for all three (3) courses:

- CBA<sup>®</sup> candidates can take the courses randomly, i.e., whichever they feel most comfortable in taking first (although, in most cases, it is recommended to begin with the HR course, then Marketing, followed by Accounting/Finance).
- While the candidates can start a course any time, including starting all three at the same time, this process is not recommended from a learning perspective.
- Once a course is started, the candidate will need to take each session in sequence.

## TESTING OUT

“Testing out” for CBA<sup>®</sup> purposes is defined as having sufficient knowledge in any of the three courses that enables the candidate to pass the exam(s) with minimal or no reading. Although an option, this alternative is strongly advised against, and is not encouraged nor endorsed by either the Ohio SBDC or its university partner. This version of CBA<sup>®</sup> was revised with the intent to include videos and supplemental readings with the latest, most up-to-date information, on which the candidate will be tested. Given the ever-changing and ever-advancing concepts and technology characterizing today’s world, it would difficult at best to pass these exams with years’ old knowledge. You’re encouraged to read the grading criteria and ramifications for failing exams above should you decide to pursue.

**NOTE: The CBA certification process does not supplant or replace the minimum qualifications required to be a Business Advisor or Director in the SBDC program. Individuals must first meet all minimum requirements as contained in either the Request for Proposal or the SBDC Operations Guide in order to be approved for said positions.**

## ACADEMIC CODE OF CONDUCT/HONOR PLEDGE

Study groups are an effective strategy for in-depth study, and, where beneficial, are encouraged. That being said, it must be remembered that CBA® exams are targeted to the **individual** business advisor and, therefore, all exams must be **original** and **individually** written. Regarding essay exams, knowingly representing the work of others as your own is prohibited, as is cutting and pasting text from the CBA® material, references, and other secondary sources. This is the only way Kent State can judge the individual's proficiency in the material.

To ensure adherence to their high standards of honesty and integrity, the Ohio SBDC and Kent State established an Academic Code of Conduct or Honor Pledge for all CBA® candidates to follow (which is included in the Appendix). Any suspicion of academic misconduct in the CBA® course will be discussed and evaluated by the instructors and the university's Judicial Affairs committee. Violation of the principles outlined in this policy may result in the following sanctions:

- Refusal by the university to accept the work.
- Failure of a specific assignment.
- Failure in the course.
- Expulsion from the CBA® program.

## NON-COMPLIANCE RAMIFICATIONS

- For Ohio SBDC network only: Non-compliance policies and procedures include not completing CBA by the six-month deadline. Ramifications for non-completion are outlined in the Appendix in the document entitled, "**Non-Compliance Policies and Procedures.**"
- If a certified SBDC Business Advisor engages in any activity that reflects negatively on the integrity of the SBDC program, the Ohio SBDC State Lead Center reserves the right to revoke that advisor's CBA certification.

## RETENTION / IDP

- Once certified, CBA® graduates must acquire a minimum of 20 hours of continuing education annually to maintain their certification. (See "*Commonly Accepted Continuing Education Courses,*" in the Appendix.)
- Training hours in excess of the 20-hours **cannot** be carried over into next year's 20-hour requirement.
- Certified Advisors will not be required to obtain additional CBA hours during the same federal fiscal [or contract] year in which they are certified.
- Those Advisors who leave their SBDC program in **good standing** can retain their certification by completing the Ohio standard of 20 hours of continuing education per year, plus submit an administrative fee.
- **For Ohio SBDC graduates,** Individual Development Plans (IDPs) **MUST** be updated annually and kept in the individual's personnel file at his/her center. (A copy of the IDP form can be found in the Appendix.)
- The IDP should be designed with input from both the Advisor and supervisor, and be aligned with the Ohio SBDC strategic plan. The IDP should identify post-CBA® training deemed necessary and critical to update and round out the education and experience level of the Business Advisor
- **NEW THIS YEAR:** The IDP and CBA® RETENTION TRANSCRIPT forms have been merged into one document for the purposes of streamlining the process and avoiding duplicity, and are to be submitted at end of FFY.



## ***GREETINGS! And Welcome to CBA®!***

The Certified Business Advisor® course is a certification program developed **by and for** SBDC Advisors. It assures our clients and funders that we have the business skills, competency, and knowledge to effectively counsel, guide and inform small business owners and entrepreneurs. CBA® also provides us with a personal sense of accomplishment by helping us develop our capabilities to their fullest potential and provides us with a professional sense of achievement by enabling us to share this knowledge with our clients. To better ensure your success in completing CBA®, the following **15 Steps to CBA Success** have been compiled to help make CBA® an efficient, effective and positive experience.

### ***15 Steps to CBA® Success!***

*(Information highlighted in yellow is for the Ohio SBDC only).*

1. To get started, registration instructions can be found on <https://www.kent.edu/cba>.

To get started, you must select the “Registration Opens” date closest to your employment start date using the following schedule. Please note that your six-month timeline for completion starts from your registration date. If you are an Ohio SBDC Director or full-time Advisor, CBA® is a condition of employment as cited in the Ohio RFP, the Ohio SBDC Operations Guide, and the local grant agreement. Therefore, full compliance with CBA® policy is expected.

REGISTRATION OPENS	REGISTRATION ENDS	SESSION BEGINS	SESSION ENDS: OHIO SBDC ONLY (6 MONTHS)	SESSION ENDS: NON-OHIO SBDC (1 YEAR--DEADLINE CAN BE TENDED)
1/20/2019	1/27/2019	February 1, 2019	7/31/2019	1/31/2020
2/20/2019	2/27/2019	March 1, 2019	8/31/2019	2/28/2020
3/20/2019	3/27/2019	April 1, 2019	9/30/2019	3/31/2020
4/20/2019	4/27/2019	May 1, 2019	10/31/2019	4/30/2020
5/20/2019	5/27/2019	June 1, 2019	11/30/2019	5/31/2020
6/20/2019	6/27/2019	July 1, 2019	12/31/2019	6/30/2020
7/20/2019	7/27/2019	August 1, 2019	1/31/2020	7/31/2020
8/20/2019	8/27/2019	September 1, 2019	2/28/2020	8/31/2020
9/20/2019	9/27/2019	October 1, 2019	3/31/2020	9/30/2020
10/20/2019	10/27/2019	November 1, 2019	4/30/2020	10/31/2020
11/20/2019	11/27/2019	December 1, 2019	5/31/2020	11/30/2020
12/20/2019	12/27/2019	January 1, 2020	6/30/2020	12/31/2020



2. Once you register, please follow the instructions in your confirmation letter asking you to review the attached directions on how to create a temporary password and access Blackboard Learn.
3. Also included with your registration letter are:

- CBA® Honor Pledge (Academic Code of Conduct) }
- FERPA }

Attached to your registration confirmation letter from Kent. These **MUST** be signed and emailed before starting CBA®.

Both the Honor Pledge and FERPA **MUST** be signed and emailed to Marilyn Bokrass at [mbokrass@kent.edu](mailto:mbokrass@kent.edu) before you begin the course.

4. To help familiarize yourself with the program/course, you should read the following documents **BEFORE** you begin CBA®:
  - Description of the courses, sessions, and overall learning objectives
  - CBA® Guidelines (this document)

## CONTENT

5. Three courses make up the CBA® certificate program, which can be taken in any order: Marketing, Accounting/Finance, and Human Resource Management.
6. The number and types of exams will differ by session and/or course. Please take your time in completing these exams. **Do not rush through the CBA process.** Hurrying through the process could result in your having to retake an exam, thus delaying your certification.
7. Please remember that you are not alone in completing this program/course, and that you do have lifelines for both course content and technical issues. Please feel free to contact the appropriate professor or technical support any time you have issues:

**Marketing:** Dr. Lawrence J. Marks, 330-672-1266, [lmarks@kent.edu](mailto:lmarks@kent.edu)

**Accounting/Finance:** Dr. Gary Gibbons, 602-448-8931 (MST), [gary@coleridgegroup.com](mailto:gary@coleridgegroup.com)

**Human Resource Management:** Dr. Mary Hogue, 330-672-1148, [mhogue@kent.edu](mailto:mhogue@kent.edu)

**Technical:** For problems accessing individual accounts/resetting passwords, visit: [learn.kent.edu](http://learn.kent.edu), enter your user ID and answer your three (3) security questions. If problems persist, contact: Darlene Kosar at [dkosar@kent.edu](mailto:dkosar@kent.edu) or 330-672-8654. Darlene is available 7:45 – 4:45 Mon. – Fri. to help.

For Blackboard Learn issues, the KSU help desk is available 24/7. Contact: [support.kent.edu](http://support.kent.edu) or 330-672-HELP.

8. Although CBA® is designed to be all-inclusive in providing you with the information you need to pass the courses, you may find it helpful to seek supplementary material for those areas you consider a weakness. Since CBA® was developed by and for SBDC Business Advisors, CBA® focuses on the same kind of information you impart when counseling your small business and entrepreneur clients.



## GRADING

9. To pass each course, you will be required to have an **overall average minimum grade of 80% and no session grade below 70%** which is the usual level for a graduate course.

If you receive a grade of less than 70%, a retake exam is necessary and must be taken before you are allowed to take the next exam or continue to the next session or course.

If you receive multiple grades of 70% or above, but the grades do not average to 80% or above for the entire class, you will be required to retake each exam until the overall average is 80% or above before moving on to the next session or course.

This makes it easier for you to learn, understand, and retain the concepts being taught rather than waiting until completion of the program. It is also easier for you to increase your grade this way.

NOTE: Each participant will be allowed to **retake one exam at no charge**. If more than one retake is required, the CBA® candidate will need to register again for that course and pay the course registration fee of \$500.

10. There is no one overall grading rubric. Since the topics in each course are distinctive from one another, a one-size-fits-all grading rubric could not equally apply to all three. With the revised CBA®, each professor will indicate what s/he is looking for in grading each session depending on the type of “examination” used in that session. At least some of the session examinations in each course will be essay exams.
11. You may find some of the information to be a review, whereas other information will be new. Regardless, since graduate school professors developed the course, **CBA® candidates are expected to submit graduate-level quality work. In addition to content, the professors will be grading your work product on composition, grammar, punctuation, and syntax.** Special instructions for submitting exams will be provided by the professor in the individual course topics.
12. **When answering the questions, include any analysis(es) or examples as requested by the professors. Also, answer the questions as comprehensively as possible, i.e., as if the professor does not know the answer. One, two or three sentence answers are NOT acceptable and will result in failure.**
13. **It is imperative that you read the material to find the answers for the multiple choice and True and False questions. Do not second-guess the answers** in the interest of hurrying through the CBA® process. Such action has resulted in a high failure rate. In high school and college, we are taught techniques for taking such exams, i.e., to eliminate answers with “always” or “never” in them. Unfortunately, this does not work in the real world. Some legislation specifically uses these terms. Therefore, check, then recheck your answers against the material you are provided.
14. If you wish to keep the material as a future reference guide, you must print off copies of the materials as you read the sessions as you will NOT be able to retrieve the material once you pass an exam and proceed to the next session or course.
15. CBA candidates are expected to know and abide by the CBA Honor Pledge (Academic Code of Conduct) posted on this website in preparing for and submitting their exams. In sum:
- 1) **CBA candidates may participate in study groups** that contribute to the learning and competence of themselves as well as their colleagues; however,
  - 2) **All exams and case studies must be individually written;**
  - 3) Given the proprietary nature of CBA, **CBA graduates shall not share either the course material or tests with current or future CBA candidates or with those in-state or out-of- state SBDC counselors who have not registered for the course.**

If the professors find any evidence of violation of any form of academic dishonesty, either individual or collective, such as cheating, plagiarism, or sharing the CBA® proprietary material with non-registered counselors, sanctions may be imposed at the discretion of the instructors, which may include:

- 1) Refusal to accept the work.
- 2) Failure of a specific assignment.
- 3) Failure in the course.
- 4) Expulsion from the CBA® program.

If after receiving your exam grades, you would like to speak to the professor(s) about your strengths and weaknesses, please feel free to contact the appropriate professor(s). You may want to include this information when developing your annual Individual Development Plan (IDP).

**NOTE: Exams will NOT be returned to protect the proprietary nature of the testing process.**

## CERTIFICATION

Certification is not declared by an individual, but rather by the university partner. Once the CBA® candidate has successfully completed the course, a Certificate of Completion will be issued by Kent State University College of Business Administration (COBA)—Graduate Programs. COBA is fully accredited by the **American Association of Collegiate Schools of Business (AACSB)** in both business and accounting.

## RETENTION

Acquiring the CBA® certificate is an achievement that confirms the level of knowledge you've acquired from education and experience, enhances your reputation as an advanced business advisor, and provides tangible proof to your clients that you have the business skills, competency, and knowledge to effectively counsel them. Retention of your certification provides you with the opportunity to take this accomplishment one step further by enabling you to stay current with the latest developments and trends in these fields.

As a CBA® graduate, you will be required to complete **"X" hours of continuing education hours** per federal fiscal or contract year to retain your certification. The number of continuing education hours is to be determined by your State Director. Those Advisors who leave their SBDC program in **good standing** will also be able to retain their certification by completing the **Ohio standard of 20 hours of continuing education per year**, plus a \$50 annual administrative fee.

Once you graduate, you will receive a packet of information explaining the process for retaining your newly minted certificate. This packet will include a transcript to be filled out by you, a flow chart explaining the process for reporting your continuing education, and a listing of the types of trainings accepted for retention. Most business-related courses, webinars, conferences, and readings will qualify for retention. **NOTE:** Certified Business Advisors® will not be required to obtain additional CBA® hours during the same calendar year in which they are certified.

**FOR OHIO CBA® CANDIDATES ONLY: Certification also requires participation in an SBA training on its loan programs.**

**Good luck!**

**We look forward to your joining the elite corps of Certified Business Advisors®!**



The Ohio Small Business Development Center (SBDC) Program is funded in part through a cooperative agreement with the U.S. Small Business Administration. The SBDC program is also funded in part by the Ohio Development Services Agency. All services are extended to the public on a non-discriminatory basis. Language assistance services are available for limited English proficient individuals. All opinions, conclusions or recommendations expressed are those of the author(s) and do not necessarily reflect the views of the SBA. Reasonable accommodation for persons with disabilities will be made if requested at least two weeks in advance. Contact SBDC at (614) 466-2711 or at our website: [www.sbdc.development.ohio.gov](http://www.sbdc.development.ohio.gov).

## NON-COMPLIANCE POLICIES AND PROCEDURES (for Ohio only)

TIMELINE	RAMIFICATION
One (1) week past the original deadline...	Notice of default issued. After Notice-of-Default, given one week to submit PIP with a new completion date of no more than 90 days to finish.
If 30 days after new completion date not completed...	Center placed on probationary status. SBDC Lead Center will require meeting with host to discuss ongoing employment.

### Probationary Status Defined:

The Ohio SBDC takes pride in distinguishing its network of advisors as professionals and in assuring both its clients and funders that its network has the abilities and requisite knowledge to competently advise and train Ohio's small business owners and entrepreneurs. Consequently, the Ohio SBDC Lead Center will work directly with the Hosts or Directors to ensure that the CBA candidates complete the program within the prescribed deadline.

Unless an extension or exemption is approved, failure to complete CBA by the six-month deadline may result in:

- a. **probation** for the candidate and/or center, making the center ineligible to apply for the next competitive RFP, and/or
- b. adversely impact the Center's ability to claim **reimbursement** for that candidate's SBDC payroll using the following schedule:

MISSED DEADLINE	REIMBURSEMENT BY SBDC
2 weeks	90%
4 weeks	75%
6 weeks	-0-

- c. Other penalties to be determined on a case-by-case basis, including the recommendation that the host search for a new director/advisor.

**NOTE:** An extension of or exemption from CBA will only be approved by the State Lead Director or his/her designee on a case-by-case basis. Request for an extension or exemption **MUST** be made in writing by the CBA candidate's Director or Host, explaining the circumstances.

# APPENDIX



Certified Business Advisor® Certificate Program

Grade Release Form

The Family Educational Rights and Privacy Act (FERPA) prohibits an educational institution from releasing confidential, non-directory information about a student without the student's consent. A student may waive this right for university officials.

Complete this release form to authorize Kent State University to access your final grades for each module of the Certified Business Advisor® Certificate program and to report these grades to a representative of the Small Business Development Center (SBDC) designated below.

Student's Name: \_\_\_\_\_

I authorize Kent State University to report the final grade I earn in each of the CBA® program modules as follows:

\_\_\_\_\_  
(Recipient's Name)

\_\_\_\_\_  
(Recipient's Address)

\_\_\_\_\_  
(City)

\_\_\_\_\_  
(State)

\_\_\_\_\_  
(Zip)

\_\_\_\_\_  
(Phone)

\_\_\_\_\_  
(E-mail)

I, the undersigned, release from all claims and agree to indemnify and hold harmless the individual providing this information, Kent State University, its Board of Trustees, agents, officers, and employees, for any and all direct, indirect, special or consequential damages, or costs, legal and otherwise resulting from the sharing of this information.

Student's Signature: \_\_\_\_\_ Date: \_\_\_\_\_

**NOTE: Please submit this form to Marilyn Bokrass at [mbokrass@kent.edu](mailto:mbokrass@kent.edu).**



## Honor Pledge

In support of Kent State University's standards of excellence, honesty, integrity, and academic accountability, I pledge, in my honor, to conduct myself at all times in accordance with university rules that prohibit cheating, plagiarism, or any the form of academic dishonesty.

As members of Kent's academic community during the course of the CBA® program, in the spirit of self-motivated and self-disciplined learning, we must take greater personal responsibility for our actions and will not tolerate individual or collective inappropriate academic behaviors.

I understand that students and faculty have an ethical responsibility to ensure that the content of student work is original or cites appropriate sources for all programs at the university. I further understand that it is my responsibility to inquire of my instructors if I have any questions as to how to authenticate any information that I include in work I submit as a course assignment.

I am aware that sanctions may be imposed at the discretion of my instructors and/or through the university's Judicial Affairs system for a violation of principles out lines in this statement, including:

Refusal to accept the work.

Failure of a specific assignment.

Failure in the course.

Expulsion from the CBA® program.

My signature on this document is an acknowledgment that I have read and understood its terms and agree to abide by them throughout my completion of the CBA® program.

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Printed Name: \_\_\_\_\_

**NOTE:** Please submit this form to Marilyn Bokrass at [mbokrass@kent.edu](mailto:mbokrass@kent.edu)

## ONGOING PROFESSIONAL DEVELOPMENT (Emphasizes Learning)

### Description:

Through the Individual Development Plan (IDP), selected ongoing professional development fulfills 2 purposes:

1. To provide **Gap Training**. Gap Training is determined by CBA® performance and if it shows:
  - a. Weakness in overall topic (Marketing, HR, Accounting/Finance);
  - b. Weakness in a particular segment of the topic;
  - b. Poor writing skills

Gap training must be related to area of weakness and completed one year after graduating CBA®.

2. To fulfill annual CBA® **Retention** requirement. Can include:
  - Professional certifications
  - Business-related Trainings
  - SBDC Signature Webinars
  - Conferences
  - Projects
  - Workshops
  - Completion of tool training
  - Publishing

## ONGOING PROFESSIONAL DEVELOPMENT (Post-CBA®)

The Individual Develop Plan (IDP) is the primary tool used for identifying professional development opportunities for all CBA® graduates.

For CBA® graduates, ongoing professional development serves two major purposes:

1. **To provide GAP training.** GAP training is determined by the CBA® graduate's performance and whether the CBA® graduate's work product shows (1) weak performance in overall topic (Marketing, Accounting/Finance, HR), (2) weakness in a particular segment of the topic, or (3) poor writing skills. In Ohio, GAP training must be completed one (1) year after completing CBA®.

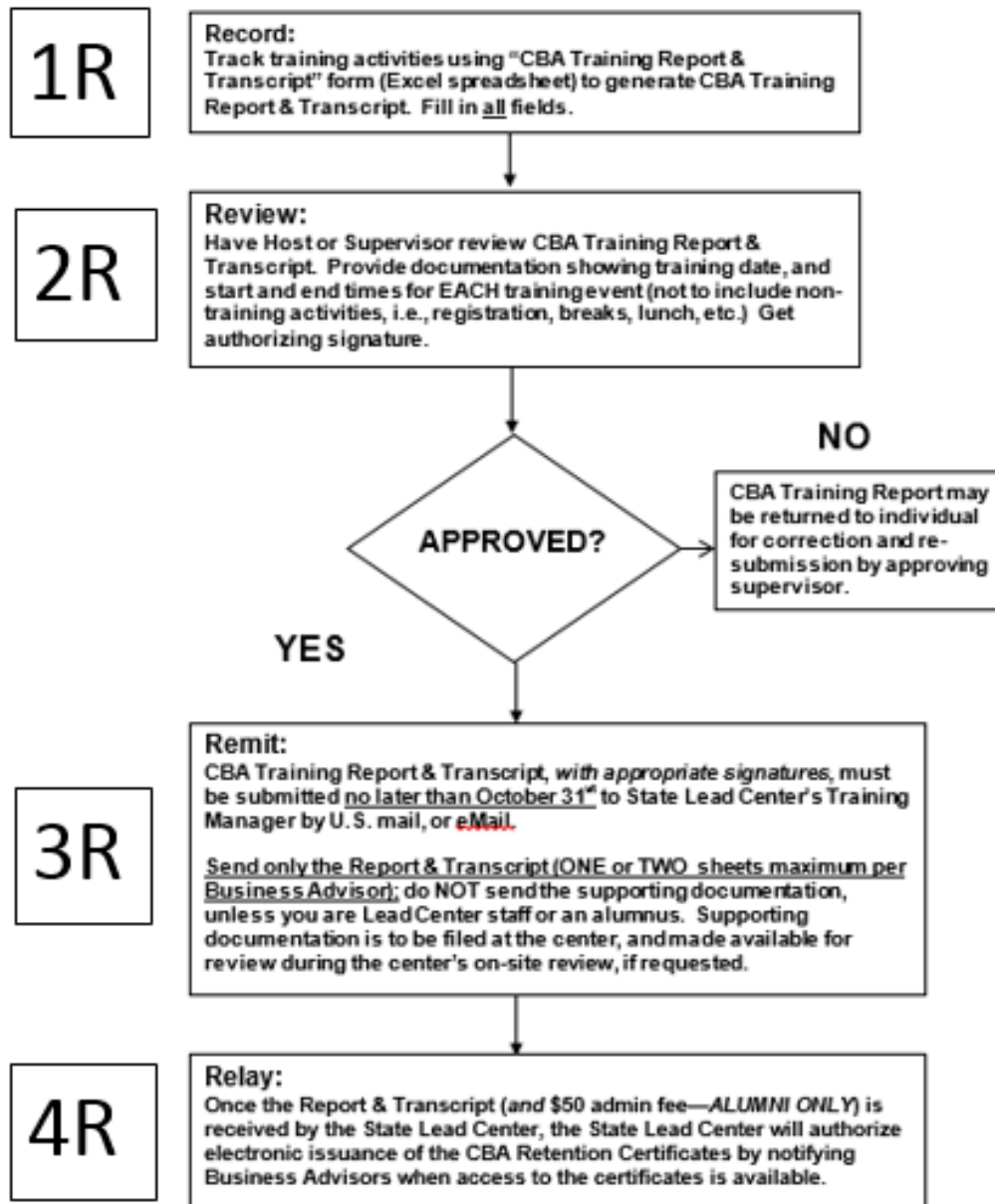
2. **To fulfill the annual CBA® Retention requirement.** The SBDC requires all CBA® graduates to complete a minimum of 20 hours of continuing education per year. There are three major reasons for this requirement:
  - (1) Client success depends on a knowledgeable and skilled Business Advisor. To increase clients' chances of success, and in turn, enable the centers to report a higher success rate, there must be high standards for the Advisors who work with the clients.
  - (2) Continuing education provides opportunities for Business Advisors to gain knowledge and skills that will enhance their professional growth and increase the value of their contribution to their small business communities.
  - (3) Continuing education can lead to high-quality service that meets the expectations of clients, thus increasing public confidence in the SBDCs and their Business Advisors and bolstering the reputation of their profession as a whole.

**For Ohio:** Since taking CBA® is a mandatory provision in the grant agreement, priority must be given to completing CBA® in the first six (6) months of employment. Once successfully completed, CBA® fulfills the continuing education requirement for the remainder of the calendar year in which the CBA® candidate graduates. Specifics regarding the types of acceptable trainings, hours awarded, and any limitations can be found in the following pages.



## CBA RETENTION PROCESS: OHIO CBA® GRADUATES ONLY

### CBA® 4-R-R-R-R TRAINING REPORT PROCESS



#### CBA Training Report Sign-off Authorization for SBDCs, ITACs, MTSBACs, MBACs, PTACs

- Hosts will review and sign-off for Directors.
- Directors will review and sign-off for Business Advisors, Consultants and Administrative Staff.
- State Lead Center will review and sign-off for State Lead Staff and CBA Alumni (former SBDC employees). (Accepts substantiating documentation from Lead Center Staff and Alumni ONLY.)

**INDIVIDUAL DEVELOPMENT PLAN / CBA® TRANSCRIPT**  
 Effective for Federal Fiscal Year (October 1 through September 30) 20\_\_\_\_  
 (Deadline to submit for CBA® Retention is October 31<sup>st</sup>.)

Name (Print) \_\_\_\_\_

Center/Company \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Primary Phone \_\_\_\_\_

eMail \_\_\_\_\_

**PROFESSIONAL DEVELOPMENT**

DATE	SOURCE OF TRAINING (Conference, Webinar, etc.)	TOPIC	CONTACT HOURS (Minus meals and breaks)
		<b>TOTAL HOURS</b> (Minimum 20)	

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Signature of Supervisor: \_\_\_\_\_ Date: \_\_\_\_\_

## ACCEPTED PROFESSIONAL DEVELOPMENT OPPORTUNITIES

(The SBDC encourages seeking training opportunities from multiple sources rather than a single source. As such, some learning opportunities are capped and highlighted in yellow to indicate the maximum continuing education hours accepted for retention.)

- [ ] Financial trainings: Bonanza, FisCAL Training, Profit & Cents
- [ ] Access to Capital
- [ ] Probative Counseling (P/C)
- [ ] Business planning and development programs (NxLevel, FastTrac™)
- [ ] IQa (Integrated Quality Assessment) training
- [ ] Lean Manufacturing training
- [ ] NDC (National Development Council) training approved courses:

### **EDFP Certification Program**

ED 101 Economic Dev. Finance  
ED 201 Business Credit Analysis  
ED 202 Real Estate Finance  
ED 300 The Art of Deal Structuring

### **Professional Dev. Courses**

ED 506 Bus. Plan & Entrepreneurs  
ED 508 Business Valuation & Acquisition & Community Courses

- [ ] Local and regional meetings and training
- [ ] SBDC Statewide conference (10 hours)
- [ ] National ASBDC conference (12 hours)
- [ ] Professional association conferences
- [ ] Professional Development conferences
- [ ] Attendance at Partner (MBAC, PTAC) conferences and trainings
- [ ] Officer/board member of business-related non-profit organization (3 hours)
- [ ] Export Assistance Certification – CGBA (Certified Global Business Professional)
- [ ] Manufacturing and Defense Certification
- [ ] Internet / Computer Training
- [ ] Books/Articles (6 hours)
- [ ] Other business-related trainings: \_\_\_\_\_  
\_\_\_\_\_

NOTE: This list is a sampling of the continuing educations opportunities accepted for CBA® Retention. This list, however, is not all-inclusive. Other **business-related** trainings may be submitted for credit.



# Book/Article Review

Your Name: \_\_\_\_\_ Book/Article Title: \_\_\_\_\_

Company/Organization: \_\_\_\_\_ Author(s): \_\_\_\_\_

State: \_\_\_\_\_ Publication (if article) \_\_\_\_\_

**What was the book/article about?**

**List principal concepts/ideas/theories.**

**Do you agree or disagree? Give reason(s).**

**Would you recommend the book/article?**

Please submit to your supervisor as supporting documentation for your annual training report.