

GUIDEBOOK

**Chapter Leadership
Training**

Professional Development Resources Guide



**NMA...THE Leadership Development
Organization**

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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. The question then arises, “How do I implement a professional development plan?”

The NMA Chapter: A Vehicle to Provide Learning Opportunities

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. A well-run chapter can provide both of these opportunities. 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*

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 chapter, can establish a growth pattern through retirement.

Chapter-conducted courses and programs are taught to groups of participants. One of the key NMA values of participation is to learn from others. Members of the community chapters have a unique opportunity to share management philosophies from a variety of backgrounds. 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.

Creating a Professional Environment

There are no “short courses” or “magic formulas” for developing managers/leaders. Only by reading, learning, practicing and teaching leadership skills do individuals grow into skilled leaders. Providing multiple opportunities to learn is the first step in creating a professional and learning environment. Keep in mind “informal” learning is as important as “formal” learning.

NMA grants CEU through an accrediting body called the International Association for Continuing Education and Training, IACET. NMA’s accreditation is not for the individual courses that are taught, per se, but for the process chapters use in providing continuing education and training. To create a professional environment, your chapter needs to use an approved process.

As the Professional Development Chair, your job is to implement the process. The basic steps in the process are as follows:

1. **ASSESS YOUR CHAPTER’S MEMBER NEEDS.**
 - ◆ You can use a survey, talk to your HR training manager, or use the LEADS assessment.
2. **CREATE A PLAN TO MEET ONE OR MORE OF THOSE NEEDS.**
 - ◆ You’ll hear more about the B3 – Authorization to Grant CEU, that’s your chapter’s plan.
3. **IMPLEMENT YOUR CHAPTER’S PLAN**
 - ◆ *Find* appropriate course materials with corresponding learning objectives and outcomes.
 - You can use NMA course materials, vendor-developed materials, or company-developed materials; whatever meets the needs of your members.
 - ◆ *Market* your selections.
 - Again, you can use a variety of methods, chapter newsletter, catalogs, email blasts; whatever works in your situation works with your chapter.

- ◆ *Deliver* the product to the customer.
 - Schedule the room, instructor, order the materials, and make sure the instructor and class members have what they need for a successful class.
- ◆ *Evaluate* each program you conduct.
 - Most use a customer satisfaction survey, but writing reports, answering questions, completing case studies are also legitimate ways to determine if the students meet the learning outcomes. We encourage you to use all.

Establishing a Professional Development Program

A chapter can release the inherent personal motivation to develop one's leadership abilities. That's the secret to personal development. The key to a successful professional development operation is *provide* the correct environment for learning. First is to determine the needs. Second, develop a plan to meet them. Then successfully implement that plan.

Assessing Individual and Parent Organization Needs

For the professional development people, there are two important tasks. Where are the weaknesses in the organization's training? 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 organizations. There is the obvious necessity to interrelate and integrate the chapter's professional development program with the organization or corporate philosophies, goals, and objectives.

The second task of understanding the needs, interests, and responsibilities of the chapter members is tantamount to defining those of the organization. The very success of an NMA chapter hinges on its voluntary nature. Some chapters rely heavily on survey information. Written surveys can be helpful if not overdone. Take the time to survey individuals personally. Several key interviews can provide you with a great deal of information. And of course do not forget the benefits of using the Leadership Evaluation and Development System (LEADS) program.

Developing the Professional Development Plan

In developing the chapter's professional development plan, use the goals and objectives you have established. A well-planned and structured program attracts more participants. Managers are busy people, and they need the opportunity to plan their personal and professional lives. 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 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.

Implementing the Professional Development Plan

A carefully-thought-out program connects and interfaces the individual member, the chapter, and NMA. Implementing it all is certainly a function of the Professional Development Committee. Every chapter newsletter should list current course offerings and "tease" members with those activities planned in the near future.

Many chapters permit non-members 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.

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

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 Guide has been prepared to help you have a successful year.

The Professional Development Committee

You, the Professional Development Chairman, must have help. A dynamic, innovative, and responsive Professional Development Committee is instrumental to the chapter's success. The group should represent the greatest cross section of your chapter membership.

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? 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.

Review NMA's website. 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. You can download additional information from NMA website <http://www.nma1.org>. Once the committee has determined the types of classes the chapter will offer, it should use this guide to examine other NMA programs. CEU (Continuing Education Units), certificate programs, NMA Educational Dividend, and Certified Manager details—all these subjects are discussed. You can now finalize a professional development program and establish a schedule. Then begin to promote the final plan to your chapter membership.

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

- Marry chapter goals to organization's goals
- "Link" courses to the "organization's way of doing business"
- Report regularly to executive management
- Request executive involvement, e.g., ask an executive to be a guest speaker in a class
- Have training people on the Professional Development Committee
- Offer courses that focus on professional development

Types of Educational Resources Available

LEADS – A New Tool for Individuals and Organizations

NMA's new Leadership Evaluation and Development System (LEADS) provides you with a unique opportunity to experience *Leadership Your Way!*

LEADS can be accessed at any time from any computer with internet capability to pursue the areas of greatest interest to you as you explore *Leadership Your Way!*

It begins with a personalized assessment of your understanding of the NMA leadership attributes and competencies. Your responses to this assessment are used to identify competencies and attributes where industry best practices could help you improve your leadership and performance. LEADS immediately generates a Leadership Analysis which evaluates your understanding of related leadership best practices in the industry. Along with the Leadership Analysis you receive a listing of associated reading, training, and work assignments to let you learn more about these best practices and try them in your work environment.

LEADS involves three key steps, all of which must be completed to get the most from the LEADS program:

ASSESS – use the multiple choice LEADS questionnaire to evaluate your understanding of industry best practices related to the NMA leadership competencies and attributes. The Leadership Analysis will identify areas of strength and potential areas for improvement.

LEARN – complete the suggested key reading, training, and work assignments found in the Leadership Analysis. They allow you to learn more about related industry best practices and are tailored to your needs.

ACHIEVE – once completed, the lessons derived from these assignments must be successfully applied in your work environment to fully realize the LEADS effectiveness and YOUR potential.

For more detailed information, go to the LEADS URL <https://www.nmaleads.org> or refer to the Appendix, page A-17.

NMA LiveOnline

Internet-based sessions have been designed to tap into the real life work experiences of the NMA member network. For one hour each week, a leadership based topic is introduced and participants from different disciplines learn how individuals and their organizations are addressing contemporary workplace issues.

For more detailed information, go to the NMA LiveOnline URL <http://www.nma1.us/lrc/online.pdf>

LeaderLabs

The LeaderLabs are exciting, fast-paced scenario-based learning. In one hour, you and your team will be presented with a leadership challenge that begs for innovative solutions. In order to run a LeaderLab you need to have at least 2 teams of 5-8 people... the more teams the better. You also need about one hour to conduct the lab. You can offer prizes to make it more interesting.

For more detailed information, go to the LeaderLab URL <http://www.nma1.us/lrc/LeaderLabs.pdf>

QuickTools

NMA Leadership QuickTools (QTs) represents a NMA initiative designed to bring leadership capabilities to all NMA members in any NMA chapter. They comprise a set of web-based aids designed to help any chapter or council operate more effectively and to expand their member participation in national activities. This is accomplished through a core set of two-page guides (designated QuickTools or QTs). We believe that these new web-based leadership resources will play a major role in reaching out to and supporting all our members.

For more detailed information, go to the QuickTools URL <Http://www.nma1.us/Quicktools/index.htm>

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. NMA “courses,” on the other hand, are a more formal activity—part of the chapter’s long-range planning. “Courses” might best be likened to “classes.” Examples are the Supervisory and Management Skills Program; FaciliSkills™ Workshops; NMA LiveOnline; and LeaderLabs. 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.

For more detailed information on all the NMA products, go to the NMA Website and click on Learning Center.

Using Non-NMA Courses and Programs

Are chapters are free to use any professionally developed course materials. Our chapters are encouraged to explore the vast outside market of quality educational materials. Your chapter is the ideal “vehicle” for administering such programs.

Conducting Courses — How to Develop Facilitators

Leaders/Facilitators for NMA Courses

All NMA proprietary courses and programs are designed so that they can be put on “in-house.” While some chapters have sought out professional instructors from colleges and company training departments, others have used members with training experience or formal education in training as leaders/facilitators. NMA LiveOnline and LeaderLabs just require a “leader” to be in the conference room. They only need to make arrangements for the class and provide handouts.

Other NMA proprietary courses have been prepared so that discussion leaders/facilitators can handle the material without being a subject matter expert.

Finding Facilitators

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. Consider asking a member of upper management to facilitate a course.

Facilitator Training - 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-5 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 A-4. Feel free to copy or change it as necessary for internal use in your organization.

What Is the Learning Resource Center (LRC)?

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 two major roles:

- As a DEVELOPER of a limited number of comprehensive, cost-effective training and development materials
- 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, and earn certificates of achievement in management studies.

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.

What Are CEU?

The Continuing Education Unit (CEU) is nationally recognized as a uniform unit of educational accomplishment by employers, licensing authorities, 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 classroom 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 one classroom hour of work. For CEU credit, a video by itself is not sufficient.

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 at the beginning of 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. 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. We no longer require Social Security numbers. Again, we recommend you do this online to avoid confusion on names due to difficulties in reading someone's writing.**

We no longer grant CEU to nonmembers except by special permission. Please contact the Professional Development Division if you have questions.

NMA headquarters sends one computer-generated CEU certificate per class participant to the chapter to be given to the individual. Please be advised there maybe a shipping and handling charge for generating a second set of certificates for a student. Encourage students to save their certificates in a safe place.

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.

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. 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.

1. Each chapter selects its own speaker and schedules him or her accordingly.
2. 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. You can download the form from the NMA website, <http://nma1.us/forms/pd/speaker-form.doc>
3. 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.

Chapter Professional Development Award

The Professional Development Chapter Award was developed to recognize chapters for outstanding efforts in Professional Development and Certified Manager activities.

Following are the award requirements from NMA's Policy and Procedure Manual (PPM):

1013. PROFESSIONAL DEVELOPMENT AWARD

- a. **Description** - This award is presented to any Chapter who meets the criteria listed in section b, c, and e. A Chapter can have an outstanding Professional Development and Certified Manager Program through conducting both NMA and non-NMA 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. Chapters earning this award will be recognized at NMA's Annual Conference.
- b. **Qualifications** – To be considered for this award, a Chapter needs to participate in NMA's Chapter Recognition Program by submitting a monthly Chapter Activity Report (R1 Form) to NMA headquarters and achieving a minimum rating of Superior for all other activities reported during their administrative year.

In addition, chapters must achieve points in both Professional Development (B1) and Certified Manager (B6) categories.

In section B1, 10% of the total points must come from items B1c and B1d. All chapters need to earn at least 5 points in section B6.

Also a Chapter must submit the name of their Professional Development Chairperson AND must have a current B3 CEU Authorization approval on file with NMA Headquarters.

- c. **Nomination Submittal** - The R1 Form will be used. No other documentation is required.
- d. **Final Selection** - This award will be presented to qualifying Chapters that have met the criteria listed in section b and c above, and earned a minimum number of combined points on the form R1 in the Professional Development and Certified Manager categories based on the formula listed in section e below.
- e. **Points Required - Chapters with more than 50 members:**

Minimum points (Min) = .1 x # Chapter *Members + 50

*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.

Chapters with 50 or fewer members need 35 points for this award:

Example: A chapter with 100 members needs 60 Min points:

Min points = .1 x 100 + 50 points = 60 points

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 that benefits all types of managers in all industries. 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 (removed “and earning power”). Certification is a stepping-stone in the career development of managers and a commitment to lifelong learning via recertification.

Obtaining the CM Designation 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 Fail 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” which Certified Manager’s display publicly after their names. New CMs receive a congratulatory letter, CM certificate, CM lapel pin, ICPM code of ethics, and self promotion kit. 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 35 years. ICPM is a non-profit educational institute and business center of James Madison University located in Harrisonburg, Virginia. ICPM is governed by a Board of Regents comprised of business and industry representatives, academics, and the public. 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.

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

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.

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.

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

Placing orders

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.

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 Second Day Air—both of which are relatively expensive. Since the chapter pays for all shipping, proper planning helps you control costs.

Returns Policy

Class size for professional development courses can change dramatically at the last minute. We encourage you to place orders for the bulk of the class members early. We will handle returns on a case-by-case basis. But as long as you return items currently available through NMA in saleable condition, we can give you full credit for your returns.

Appendix A

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, 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 copies of the course evaluations (NMA materials have evaluations on the last page of the participant manuals). Originals should be forwarded to NMA headquarters, to the attention of Professional Development.
- 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"

\$2.00



**Advanced Management Studies Program
Certificate
ams0300**

11" x 8.5"

\$2.00



**Advanced Management Studies Program
Completion Certificate
ams0350**

11" x 8.5"

\$2.00



**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

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)	
<input type="checkbox"/>	A Sponsored-Speaker
<input type="checkbox"/>	\$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:	
<input type="text"/>	Supervisory and Management Skills Courses
<input type="text"/>	Certified Manager Courses
<input type="text"/>	"Lunch and Learns" - One hour courses over the lunch hour
<input type="text"/>	Half-Day Seminars or Workshops
<input type="text"/>	Full Day Seminars or Workshops
<input type="text"/>	Chapter Leadership training (at the Leadership Development Conference, Council Meetings, Transition training, or Mini-Leadership Development Conferences.)
<input type="text"/>	Other

Professional Development Activities		
Yes	No	Our plan is to provide training or professional development activities in the following areas: (Check yes to all that apply.)
<input type="checkbox"/>	<input type="checkbox"/>	Personal Development- courses such as presentation skills, balancing work and home life, retirement planning, and any other course targeted to the individual skills.
<input type="checkbox"/>	<input type="checkbox"/>	Team Development- courses such as working in small groups, group decision making, team building, and any other course that covers working in groups.
<input type="checkbox"/>	<input type="checkbox"/>	Management/Leadership Development- courses such as <i>Challenge of a New Employee</i> , managing for performance, and any other course that covers leading or managing a group of individuals.
<input type="checkbox"/>	<input type="checkbox"/>	Communications- courses such as <i>Spanish for Work</i> , writing for business, listening skills, electronic communications, publishing, or any other course that covers any communication skills.
<input type="checkbox"/>	<input type="checkbox"/>	Computer Software- courses that teach how to use MS Word, MS PowerPoint, Unix or any other course that covers computer skills.
<input type="checkbox"/>	<input type="checkbox"/>	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

	More than 1000 participants
--	-----------------------------

<i>Chapter's Focus</i>		
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

<i>Please double check information above before submitting.</i>	
	Thank you for submitting your Chapter's Authorization To Grant CEU.

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



To submit your Request for CEU Approval for a Non-NMA Course electronically, simply fill out the information requested below and click the box "Send My Information to NMA."

Chapter Name & Number:

Facilitator's Name:

Information about the course:

Start Date:

Course Name:

Material Format:

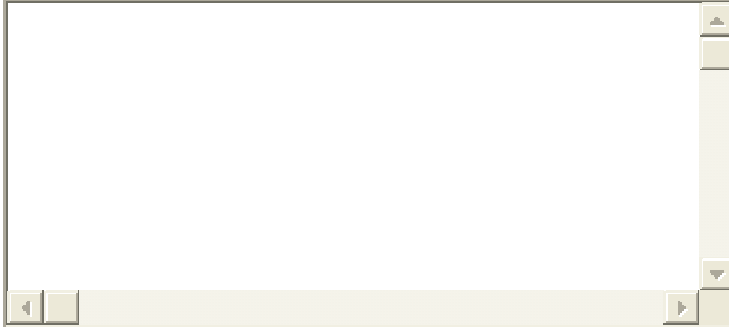
**Total
Classroom
Hours:**

Vendor:

Brief Outline of Course Content (must be provided):

Learning Outcomes (must be provided):

(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: (You will receive an electronic approval.)

Submitting person's e-mail address (must have e-mail address for electronic approval):

Submitting person's phone number:

[Send My Information to NMA](#)

[Re-enter Information](#)

If you have any questions or need additional information, call NMA headquarters at 1-937-294-0421 or e-mail us at karen@nma1.org.

Request for CEU and Student Certificates (B-5 Form)

To submit your Request for CEU and Student Certificates electronically, simply fill out the information requested below and click the box "Send My Information to NMA."

Chapter Name & Number:

Instructor's Name:

Course Name:

Course Code:

CEU Value:

Start Date:

End Date:

Course Participants

NMA Member Y/N?

Participant's Name

Award CEU?

Award CEU?

Award CEU?

<input type="checkbox"/>	<input type="text"/>	Award CEU? <input type="checkbox"/>
<input type="checkbox"/>	<input type="text"/>	Award CEU? <input type="checkbox"/>
<input type="checkbox"/>	<input type="text"/>	Award CEU? <input type="checkbox"/>
<input type="checkbox"/>	<input type="text"/>	Award CEU? <input type="checkbox"/>
<input type="checkbox"/>	<input type="text"/>	Award CEU? <input type="checkbox"/>
<input type="checkbox"/>	<input type="text"/>	Award CEU? <input type="checkbox"/>
<input type="checkbox"/>	<input type="text"/>	Award CEU? <input type="checkbox"/>
<input type="checkbox"/>	<input type="text"/>	Award CEU? <input type="checkbox"/>
<input type="checkbox"/>	<input type="text"/>	Award CEU? <input type="checkbox"/>
<input type="checkbox"/>	<input type="text"/>	Award CEU? <input type="checkbox"/>
<input type="checkbox"/>	<input type="text"/>	Award CEU? <input type="checkbox"/>
<input type="checkbox"/>	<input type="text"/>	Award CEU? <input type="checkbox"/>
<input type="checkbox"/>	<input type="text"/>	Award CEU? <input type="checkbox"/>
<input type="checkbox"/>	<input type="text"/>	Award CEU? <input type="checkbox"/>
<input type="checkbox"/>	<input type="text"/>	Award CEU? <input type="checkbox"/>
<input type="checkbox"/>	<input type="text"/>	Award CEU? <input type="checkbox"/>
<input type="checkbox"/>	<input type="text"/>	Award CEU? <input type="checkbox"/>
<input type="checkbox"/>	<input type="text"/>	Award CEU? <input type="checkbox"/>
<input type="checkbox"/>	<input type="text"/>	Award CEU? <input type="checkbox"/>

Mail CEU Certificates to: (name, address, and phone number)

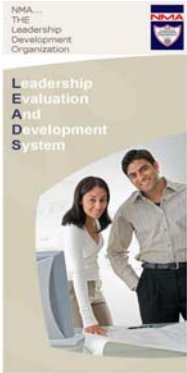
By submitting this form, I certify that each participant for whom I have marked "Award CEU" has attended a minimum of 75% of the course hours and has demonstrated the suggested learning outcomes accordingly.

Submitting person's e-mail address:

Send My Information to NMA	Re-enter Information
--	--------------------------------------

If you have any questions or need additional information, call NMA headquarters at 1-937-294-0421 or e-mail us at karen@nma1.org.

NMA LEADS... a complete online Leadership Evaluation and Development System



Looking to assess your leadership skills? Not too hard to do. Looking for an online leadership assessment tool? A bit more complicated to find, but they're out there. But, looking for a complete personal leadership assessment SYSTEM? You'll find it here:

NMALEADS FAQs

Q. Can you give me a Quick Overview of LEADS?

- For only \$35, NMA's new Leadership Evaluation and Development System (LEADS) provides you with a unique opportunity to experience Leadership Your Way!
- LEADS can be accessed at any time... by anyone... from any computer with internet capability... to pursue the areas of greatest interest to you as you explore LEADERSHIP YOUR WAY!
- LEADS begins with a personalized assessment of your understanding of the NMA leadership attributes and competencies as developed in the **NMA Leadership Model**.
- Your responses to this assessment are used to identify competencies and attributes where industry best practices could help you improve your leadership and performance.
- LEADS provides associated reading, training, and work assignments to let you learn more about these best practices and try them in your work environment.

Q. What all is involved in your system... and how can I get the most from the LEADS program?

ASSESS – use the multiple choice LEADS questionnaire to evaluate your understanding of industry best practices related to the NMA leadership competencies and attributes NMA Leadership Model. The Leadership Analysis will identify areas of strength and potential areas for improvement.

LEARN – complete the suggested key reading, training, and work assignments found in the Leadership Analysis. They allow you to learn more about related industry best practices and are tailored to your needs.

ACHIEVE – once completed, the lessons derived from these assignments must be successfully applied in your work environment to fully realize the LEADS effectiveness and YOUR potential.

Q. If I want to get started, how do I get to the assessment?

1. Click on the URL: <https://www.nmaleads.org>.
2. Fill out the application portion and submit; you will be connected to a credit card payment page that you must complete and submit.

3. Watch your e-mail. In just a couple of minutes you will get a return e-mail with a user I.D. and a password. Write them down.
 4. Return to the NMA LEADS site <https://www.nmaleads.org>, then go to the assessment link and begin your Leadership Evaluation. The assessment typically takes about an hour and has a two-hour time limit.
 5. LEADS has a restart capability, so if you are interrupted you can log back on to resume your assessment anytime in the next 30 days by reentering your user name and password.
 6. When you have submitted your answer to the last question, your Leadership Analysis will come to you immediately... **IMPORTANT... SAVE YOUR REPORT TO YOUR COMPUTER!**
 7. Please take a moment and click on the link at the top of your Leadership Analysis to give us your feedback.
 8. If you have any difficulties and most especially, if you have comments you'd like to share, please e-mail us at karen@nma1.org.
-

Q. Tell me about the Assessment Application.

Your assessment fee payment opens the door. Enter your credit card information in our secure payment page to get access to the LEADS Application page. How can you make the most of that? Start by providing the information requested in the LEADS application. Make sure that you include your name, organization (typically your company name), email address, education, experience, and any NMA affiliation if applicable. After you receive your signup email, check out the description of and references for the leadership competencies which can better prepare you for your LEADS assessment.

Q. Can you tell me a little more about the actual Assessment itself?

You begin by clicking on the LEADS assessment link and entering your one-time user name and password. Once you submit these, you will be entered into the actual LEADS assessment which provides you with 120 questions designed to test your understanding of best industry practices associated with specific leadership attributes and competencies. See NMA Leadership Model. Each question will display the attribute and competency it addresses, so you can use that to put the question in context. The assessment is timed for two-hours, but you can pause as many times as you wish. You must complete the assessment within 30 days from the date you start the assessment.

Address each question by making sure that you understand what it calls for, then eliminate all answers that you believe to be incorrect. Once you've done that, pick what you believe to be the best answer. Guessing is OK if you don't know the answer. This is not a Pass/Fail exam, it's an evaluation of your understanding of the best industry practices for a specific leadership attribute and competency.

After you've answered all questions, LEADS will automatically provide an Leadership Analysis which scores your understanding of leadership competencies and attributes and provides recommendations on reading, training and work assignments that can help you be more effective in the future. Make sure that you save your Leadership Analysis to your desktop before you do anything else. Once saved, it will always be there to help you learn more about leadership.

Before you exit your assessment, please provide us your evaluation of LEADS as a learning tool by clicking on the feedback link. Your inputs will be used to drive future LEADS improvements.

Q. What is the Leadership Analysis all about?

One of the pluses of NMA LEADS is that we put the “instant” in “instant gratification”! Your assessment is immediately scored and within minutes you receive a complete report identifying areas of strength and potential areas for improvement.

Don't be alarmed if your initial LEADS assessment results present you with many pages of improvement recommendations... that's normal. Address these by first looking for competencies where you scored below average (1 or 2), and then start with the associated competency that's most relevant to your work environment. Begin with the BROWSE hyperlink (if available). That will give you a summary of related best practices, and will allow you to decide if you want to BORROW or BUY the associated reading reference.

Note that the BORROW hyperlink will steer you to the nearest library where you can check out the recommended book. Simply enter the book title and then select the appropriate book from the search results. If you type your zip code into the location box and hit the search key again, WorldCat will bring up all libraries in your area, along with contact information and hours. The BUY hyperlink (where available) will similarly take you to Barnes and Noble or other online sources where you can buy new or used copies of the recommended book.

After you've completed your reading homework, reinforce your new skills by taking the recommended training, which will be either an online podcast or a suggested course. The TAKE hyperlink (where available) will take you to a site where you can either sign up for the recommended course, or review an online webcast or video. You will need to enter the webcast name in the online search function to go directly to the webcast. If there is no search function, simply scroll down the list of webcasts until you come to the one you want. This next step in leadership learning will prepare you for application of your learning.

The LEADS work assignments are intended as a first step in this process. After you complete these, you should then implement what you have learned in your work environment... the last step of LEADS learning.

That result is, of course, the ultimate goal of LEADS, and, until you get there, your LEADS education is incomplete. Only by demonstrating the lessons you've learned in your work environment can you gain the true benefits of LEADS.

Q. Are these assessment results anonymous and confidential?

Absolutely. Individual participant information and results are kept confidential and not released to any other parties, whatsoever. LEADS is a learning tool, not a grading tool. Read the privacy policy.

Q. What is the background of NMA LEADS? How did this get started and who all was engaged in its development?

After the “need for LEADS” was established by a group of senior level advisors to NMA, the Association set out to meet that need. **LEADS** represents a major effort that drew on volunteers and teaming arrangements from across the United States to provide:

- Over 1,700 hours of volunteer time to generate the LEADS contents and infrastructure
 - \$10,000 Grant from the NMA Boeing Aerospace Leadership Chapter for seed money which supported LEADS technical programming
 - Teaming with Dale Carnegie, Inc. to develop the LEADS contents and to build LEADS competency descriptions
 - Teaming with getAbstract to provide all LEADS volunteers access to the book summaries recommended by LEADS
 - Teaming with OCLC WorldCat to provide LEADS users with a free library search routine which locates the closest library where they can check out books recommended by LEADS
-

Q. Is LEADS available for group purchases or can it be customized?

Yes... and yes.

Contact karen@nma1.org or Karen Tobias at 937/294-0421. The NMA staff will eagerly work with you to provide multiple assessments or customize the questions to link directly to your own leadership model or in-house leadership development program.

Q. Are there brochures available for download?

If you would like to print a brochure with more information, go to the following URLs:

Company/Organization <http://nma1.us/lrc/LEADSexecutive.pdf>

Individual member <http://nma1.us/lrc/LEADSindividual.pdf>

User Guide for individual member <http://nma1.us/lrc/LEADSuserguide.pdf>
