

## **TMA Guidelines for Hosting the Body of Knowledge Courses and Examinations**

TMA International encourages firms and TMA chapters to consider serving as hosts in offering TMA Body of Knowledge courses and examinations in conjunction with local or regional events or as separate CTP events. The following policies have been established for interested parties. These policies outline the responsibilities of TMA and the host, and describe venue requirements. Please note, the Body of Knowledge courses will be advertised broadly and registration will be open to all interested individuals; registration is not limited to only those interested in pursuing the CTP designation, or to individuals from one specific chapter. Firms that are interested in offering Body of Knowledge educational courses to their employees are encouraged to contact TMA for additional information. These programs can be tailored to meet the specific needs of interested firms, and registration will be limited exclusively to employees of the host firm. Examinations, however, are open only to those who have met all eligibility requirements and have been approved in advance by the Standards Committee.

TMA International's Body of Knowledge courses and examinations are offered on three consecutive days, one topic per day, with exams administered at the conclusion of the course (same evening). The Accounting/Finance and Law courses begin at 9:00 am and end at 4:00 pm, with the examinations beginning at 4:30 pm and ending at 7:00 pm. The Management course begins at 8:00 am and ends at 3:00 pm, with the examination beginning at 3:30 pm and ending at 7:00 pm. Alternate scheduling arrangements can be made with approval from the faculty dean and Certification Oversight Committee. Please contact TMA for more information.

### **Host Responsibilities:**

Identify a local champion. The chapter or firm hosting the event must designate one individual to serve as the point of contact with TMA staff and to be responsible for securing the venue, ordering food and beverages for the event, and advertising locally. In cases in which the point of contact delegates planning responsibilities to multiple individuals, the point of contact remains solely responsible for assuring the duties are completed and for maintaining contact with TMA staff.

Select a date. TMA International requests that Body of Knowledge courses and examinations **not be scheduled 30 days before or 30 days after** any TMA International conference. We also ask any planners to avoid any direct conflicts with TMA regional or chapter events. Interested chapters or firms should notify TMA of their interest at least four months before the desired date of the event. This is necessary for faculty scheduling purposes and allows for adequate marketing time.

Secure a venue. TMA strongly encourages the local champion to partner with a firm that is willing to donate space for the event. Because meeting space does occasionally need to be rented, TMA will reimburse the chapter/firm up to a total of \$1700.00 for meeting space and equipment for each series. Specific equipment requirements are outlined below. Charges in excess of the reimbursable amount will be absorbed by the host. Contracts for venue rental should be submitted to TMA for review and approval prior to placing any order or entering into any contract.

The conditions of the event venue must adhere to specific requirements, as outlined in Exhibit A. Regardless of the room, time, or location of the event, the learning and testing environments should be as similar as possible to ensure that participants learn and perform to their highest ability. This includes consideration of the room temperature, lighting, and space and comfort of the work area. The environment must be free from distractions and interruptions. It is the responsibility of the point of

contact to check the venue prior to the event to ensure that it meets each of the specific requirements referenced in the attachment.

If possible, the point of contact should develop an alternate site plan in case an emergency or a problem arises on the day of the scheduled event. Should this occur, please notify TMA as soon as possible.

Order food. It is the point of contact's responsibility to order food and beverages for the event. When the exam is being held on the same day as the course, meals include breakfast, lunch, a late afternoon snack and beverage, and a snack and beverage during the evening examination period. Please consult TMA staff when alternate course and exam schedules are followed. Body of Knowledge faculty must be included in food and beverage counts. TMA International will reimburse food and beverage costs up to a total of \$1100.00 per day. Charges in excess of the reimbursable amount will be absorbed by the host. Sample menus are available upon request. Contracts for food and beverages should be submitted to TMA for review and approval prior to placing any order or entering into any contract.

Market the program. It is the point of contact's responsibility for marketing and promoting the program. All marketing materials that the point of contact develops for this purpose must be reviewed and approved by TMA staff.

Cancellation. TMA requires that a minimum of 15 individuals be registered for any proposed BOK course at least 10 business days prior to its scheduled date. If the minimum number of attendees has not been met by this deadline, the course will be cancelled. In general, when a course is cancelled its accompanying examination will also be cancelled; however exceptions to this rule may exist. TMA will inform the point of contact of any course and/or exam cancellations and will notify all registered individuals.

#### **TMA Responsibilities:**

TMA will partner with the chapter or firm to ensure the event is a success. TMA will

- secure faculty
- schedule the event
- advertise the event in the Journal of Corporate Renewal
- post the event to TMA's website
- send blast emails to all TMA members starting 6 weeks before the event's scheduled date and continuing through the start of the event
- assist the point of contact
- review marketing materials
- register participants
- collect all event-related fees

#### **Additional Important Information**

Contacting TMA International at least four months in advance of a desired event will not guarantee its occurrence. Successful scheduling depends, in large, on faculty availability, the number of events currently scheduled for the year, and the number of events scheduled in the interested party's region. It is wise to contact TMA International as far in advance as possible.

For more information please contact TMA International at 312-578-6900.

## **Exhibit A**

### **Venue Requirements for Courses and Examinations**

#### Physical Requirements

##### General Requirements:

- ☐ Parking, if provided, must be at or within close proximity to the course/exam venue.
- ☐ The environment must be free from distractions and interruptions. Make sure noise and traffic are kept to a minimum. Food and beverage refreshment times throughout the day should be taken into consideration.
- ☐ As with any event, be prepared for emergencies or other situations that may interrupt the testing environment. The venue must satisfy all legal requirements for safety, health, and accessibility for all candidates under the Americans with Disabilities Act.

##### Specific Requirements

- ☐ Make sure the room is large enough to accommodate at least 30 attendees comfortably.
- ☐ To discourage examinees from viewing other examinees' booklets during testing, TMA recommends using 6-foot long rectangular tables with no more than two candidates seated per table. Round tables are prohibited.
- ☐ Arrange tables classroom- or lecture-style.
- ☐ Tables should be at an acceptable height and should provide a large enough surface for attendees' course materials and note-taking during instruction, and must accommodate test booklets, blue books, and writing materials during examinations.
- ☐ The room must be at an appropriate, comfortable temperature and must be well-ventilated.
- ☐ The room's lighting must be bright enough for reading fine print and the acoustics must allow each candidate to hear the instructor clearly with or without a microphone.
- ☐ If an LCD projector is being used as part of instruction or as a part of testing, the room must offer sufficient electrical access without providing a physical or safety hazard to candidates or the instructor.

#### Specific Course Requirements\*

A moveable podium must be available for instructor use for each Body of Knowledge course. In addition, an LCD projector and two easels with markers must be available for the Management and Accounting/Finance courses.

\*TMA will notify the chapter/firm contact persons in advance of any additional A/V requests made by course instructors