

VERSION: 1.0
NOVEMBER 22, 2017



CREDENTIAL MAINTENANCE HANDBOOK

CERTIFIED PETROLEUM DATA ANALYST (CPDA)TM

PROFESSIONAL PETROLEUM DATA MANAGEMENT ASSOCIATION

CALGARY, ALBERTA, CANADA

Contents

Certified Petroleum Data Analyst (CPDA) Credential Maintenance	2
Introduction	2
CPDA Credential Maintenance Overview	2
Credential Maintenance Requirements.....	3
CPDA Competency Areas	4
Credential Maintenance Process	4
Ways to Earn PDUs.....	5
Calculating PDU Credits	8
Attending educational/training courses and seminars.....	8
Publishing a data management article or book.....	8
Report Your PDUs	9
Audit of PDU Hours	9
Recordkeeping	9
Certification Renewal Fees and Policies	10
Revocation/Failure to meet PDU requirements	10
Certification Status.....	11
Active Status	11
Suspended Status.....	11
Expired Status	11
Retired Status.....	11
Appendix - ETHICAL INTEGRITY POLICY	12
INTRODUCTION	12
ETHICAL MISCONDUCT	12
PENALTIES AND CONSEQUENCES FOR ETHICAL MISCONDUCT.....	13

Certified Petroleum Data Analyst (CPDA) Credential Maintenance

Introduction

The CPDA credential requires ongoing professional development to maintain an active certification status. You will need to follow the Credential Maintenance program and earn professional development units (PDUs.) The goal is to ensure that your certified competencies stay relevant and up-to-date.

Your PDU activities must relate to topics that are substantially consistent with the exam Competency Areas outlined for your CPDA certification.

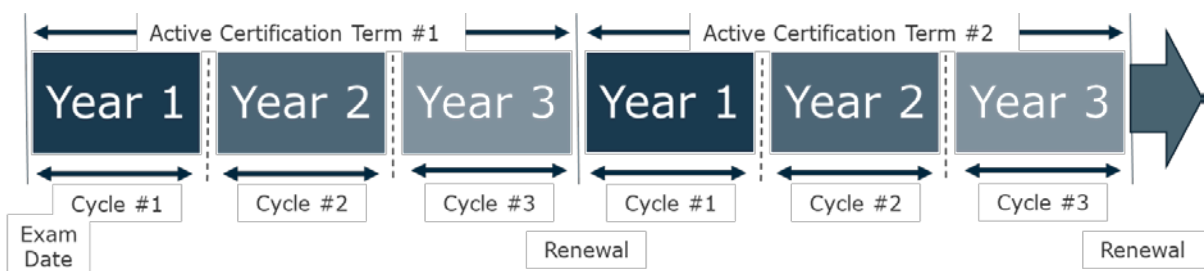
We know that everyone has different professional needs and desires. The Credential Maintenance program is designed to be flexible so that it can adapt to those needs and allow you to customize your Credential Maintenance activities. This program provides a general framework and guidance—you ultimately determine your Credential Maintenance and professional development path.

CPDA Credential Maintenance Overview

The Credential Maintenance program supports the ongoing educational and professional development of our certification holders so that they are prepared to meet the demands of today's complex and evolving business environment. The purpose of this program is to:

- Enhance continuous learning and development among certification holders,
- Provide direction in development areas to ensure relevancy of certified practitioners,
- Encourage and recognize individual learning opportunities,
- Sustain the global recognition and value of the CPDA credential.

Each person that earns their CPDA must maintain their certification through participation in the Credential Maintenance program in order to remain in good standing and renew their certification at the end of every three (3) year term.

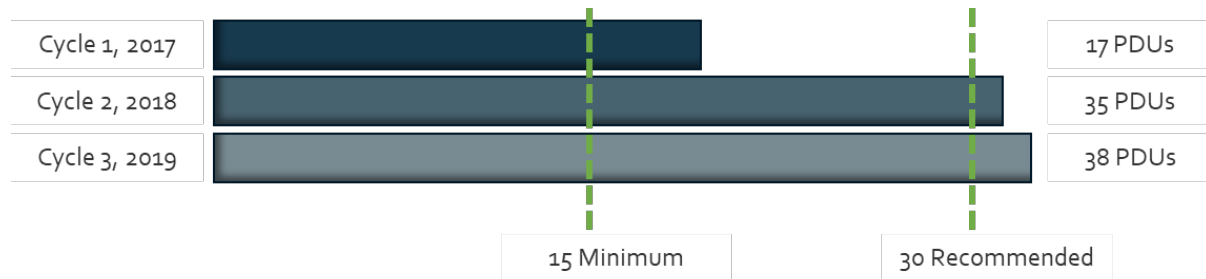


Partaking in regular professional development and learning activities allows certification holders to earn Professional Development Units (PDUs), fulfilling the continuing certification requirements and ultimately growing and developing as a practitioner.

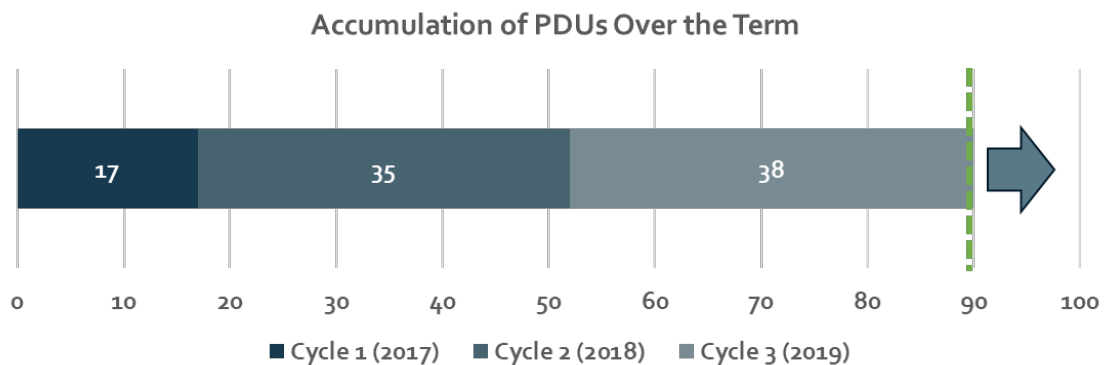
Credential Maintenance Requirements

All CPDAs are required to complete a minimum of ninety (90) hours of professional development units (PDUs) per certification term in order to renew their certification. Each term is constructed of three (3) cycles (years). It is expected that all CPDAs will achieve a minimum of 15 of the PDUs in each of the cycles in order to stay relevant in every year. There are no constraints on the maximum PDU's that may be submitted; however, the minimums must be met per certification term.

This illustration demonstrates one possible representation of the requirements by annual cycle over the 3-year certification term.



When the minimum threshold of 15 PDUs is met in a single cycle and the minimum total of 90 PDUs is achieved over the three (3) cycles of the term you will satisfy the professional development component of your credential maintenance.



If all requirements are met by the end of the certification term, an updated certificate will be issued to the certification holder. The renewal date of the new certificate will be three years from the expiration date of the last certificate issued.

CPDA Competency Areas

Time involved in obtaining PDUs will be recognized in any one of the eight CPDA **competency areas**:

- Data Governance,
- Data Analysis,
- Data Quality Management,
- Data Security,
- Spatial Data,
- Exploration and Production (E&P) Life-Cycle,
- Master Data Management,
- Communication.

CPDAs may choose which of the competency areas to focus their professional development over each of the credential maintenance cycles within the term of their CPDA.

You are encouraged to follow a well-rounded approach to your professional development, and to attempt to expand your knowledge in all eight competency areas covered by the CPDA.

Credential Maintenance Process

There are a few key steps that encompass the process around the CPDA Credential Maintenance process.



Following this process will assist you to:

- Understand where you are in your certification cycle
- Track your progress against Credential Maintenance requirements
- Report PDUs as you earn them
- Check your PDU transcript

Ways to Earn PDUs

PDUs will be accepted for the certification renewal requirement **as long they are directly related to the CPDA Exam Blueprint and meet the guidelines listed below**. All CPDA certification holders must earn PDUs to actively maintain their CPDA certification.

These PDUs can be earned through various professional development activities that center on one of two areas:

1. **Group A: Education** – Learning opportunities that allow you to expand and enhance your technical, leadership, or strategic and business management skills.
Competency: Specific.
A minimum of sixty (60) PDUs required per certification term.
2. **Group B: Giving back to the Profession** – Activities that enable you to share and utilize your knowledge and skills to contribute to and help build the profession.
Competency: Non-Specific
A minimum of thirty (30) PDUs required per certification term.

If you are unsure if a professional development activity meets the Credential Maintenance requirements, please contact the Registrar (certification@ppdm.org) providing details of your intended activity. When necessary the Registrar will work with the Petroleum Data Management Certification Committee (PDMCC) to determine this.

		Professional Development Activity	PDU	Evidence Required
90 PDUs	Group A Education (Minimum 60 PDUs required per term)	Registered Courses Training courses, seminars aimed at developing your petroleum data management, knowledge, skill and competence	A maximum of 60 PDUs will be awarded per term	Registration form, certificate or letter of attendance and course abstract.
		Conferences & Industry Events Attending professional conferences aimed at developing your petroleum data management knowledge, skill and competence	A maximum of five PDUs will be given per day to a maximum of 20 PDUs per term	Registration form, certificate or letter of attendance and event agenda.
		In-House Training Attending employer-provided, workplace continuing education aimed at developing your petroleum data management knowledge	A maximum of 20 PDUs per term	A certificate/letter from employer outlining the learning outcomes.
		Self-Directed Learning Reading books, instructional workflow manuals, published articles and attending webinars aimed to develop your competence	A maximum of 10 PDUs will be awarded per term	Provide details of the learning materials and outcomes.
		University or Academic Institution Courses Successfully completing academic coursework. Courses must be offered for degree/diploma credit and related to petroleum data mgmt.	One semester will equate a total of 20 PDUs to a maximum of 60 PDUs per term	Transcript or grade report indicating a passing mark.
	Group B Giving Back (Minimum 30 PDUs required per term)	Create Content Creating new knowledge resources for use by industry	A maximum of 15 PDUs will be awarded per term	Provide details of the materials and outcomes.
		Give a Presentation Presenting on topics relevant to the Data Analyst profession	A maximum of 15 PDUs will be awarded per term	Provide details of the presentation and your preparation
		Share Knowledge Sharing your data analyst knowledge to help others learn and grow, e.g. mentorship	A maximum of 15 PDUs will be awarded per term	Provide details.
		Volunteer Providing volunteer services to non-employer or non-client organizations	A maximum of 15 PDUs will be awarded per term	Provide summary of activities and organization
		Work as a Practitioner Working in your certified role	A maximum of 15 PDUs will be awarded per term	Provide updated CV/résumé

The information provided above is examples of qualifying activities and are not intended to be an exhaustive list. Unless expressly prohibited, other activities related to the Group A domains and Group B categories may also qualify. As professionals who subscribe to the PPDM, members are encouraged to use their best judgment to determine relevant PDUs when selecting activities not listed within these guidelines. Activities surrounding hobbies or a second profession not related to the credential are **not** eligible for credits. For examples, activities that do not qualify for earning either Group A or Group B PDUs are attending Alumni Association Meetings, PTA, or Photography Club gatherings, as these activities are not related to the credential.

Key Notes:

- **In most instances one (1) hour of related instruction equals one (1) PDU.**
- **A cycle refers to the period of time equal to one year.**
- **The term refers to a set of three (3) cycles in the credential period for renewal.**
- **A total of 90 PDUs are required per credential renewal term**
- **The average of 30 PDUs are required per cycle.**

PDUs accumulate for a three-year period starting immediately after the certification is issued and cannot be carried over to the next three-year timeframe or be transferred to another person. Courses taken more than one time during the three-year renewal cycle will be given credit only once.

Calculating PDU Credits

PDU credits are weighted by activities. Shown below are common categories of activities and the number of credits CPDAs can earn for each activity. Typically, a CPDA will earn one PDU credit for one-hour time spent in an educational activity. However, some activities are worth more credits due to the depth of study or amount of ongoing commitment involved.

Attending educational/training courses and seminars - **Group A**

Educational training courses and seminars related to the competencies of the CPDA credential will qualify for one Group A PDU credit for each hour of attendance. Training courses and seminars that are not related to the competencies of the CPDA credential may qualify as one Group B PDU credit.

Publishing a data management article or book – **Group B**

Group B PDU credits are earned for the first publication of an article placed/published in a journal or magazine. The article must be related to the domains of a member’s credential. The article may be printed or in electronic form. Table below identifies the number of PDUs that will be earned based on the length of the article.

Published Work PDU Eligibility	
Article Length	PDUs
1 – 5 Pages	5
6+ Pages	10
For works requiring additional consideration, please contact certification@ppdm.org	

Certificants are entitled to 30 Group B PDU credits for the initial publication of a book. Reprints or republications do not apply. The book must be related to the member’s credential. No Group A PDU credits are allowed within this category

Report Your PDUs

Certificants must meet all credential maintenance requirements during the 3 year certification term to retain their active status. You, as the certified professional, are responsible for tracking and managing your own PDU activities. You will be expected to submit the Credential Maintenance Reporting Form prior to the end of your certification term. Approximately 6 months prior to the end of your term you may receive a reminder of this from the Registrar.

Audit of PDU Hours

Each year the Registrar will randomly select Certificants to be audited. The audit process requires ten (10) percent of credential holders to further verify the claims that have been submitted for the certification term. Verification may be requested as far back as the beginning of the latest certification term. Certificants will be requested to submit additional documentation within 60 days from the requests. Failure to provide documentation may result in a suspension of the credential. Once the additional documentation is received, it will be reviewed and if found acceptable will be placed in the Certificants file. If the documentation does not fulfill the requirements the Certificant will be notified of the problem or additional support required.

If at any time the Certificant has any questions with regards to this process, they are encouraged to make contact with the Certification Registrar at certification@ppdm.org.

Recordkeeping

A CPDA must obtain and maintain documentation supporting reported PDU activities. Certificants must retain the documentation for **twelve (12) months following the end of each certification term** and contain each of the 3 reporting cycles. Documentation should be in the form of a letter, certificate of completion, attendance roster, and verification of attendance form or other **independent attestation** of completion. At a minimum, each record should include the name of the attendee, name of the sponsoring organization, activity title, activity description, activity date, and the number of PDUs awarded or claimed. Note: Calendar screenshots, receipts, invitations, etc. by themselves are not compliant documentation.

Certification Renewal Fees and Policies

There are annual renewal fees associated with the maintenance of a CPDA credential. These fees are due each year on the anniversary of each CPDA's certification. (E.g. For a credential achieved on May 1, 2017, the first annual renewal fee payment would be expected on or before May 1, 2018 and annually thereafter).

There are two rates for CPDA Annual Renewal Fees, Member and Non-Member. CPDAs will receive the member rate if their PPDM membership is in good standing at the time of renewal.

Annual Renewal Fees	
PPDM Member	Non-Member
\$75.00	\$150.00
Plus, applicable taxes	

CPDAs will be contacted with reminders of their outstanding renewal, if a renewal is not completed within 90 days the CPDA credential cycle, the credential may be suspended. This will be reflected on the Credential Registry.

When annual renewal payments are received, and Professional Development requirements are met CPDAs will receive a new certificate and begin their next three (3) cycle Credential Maintenance term.

Revocation/Failure to meet PDU requirements

CPDAs must meet the minimum PDU requirements. CPDAs who fail to comply with the Credential Maintenance Policy may have their CPDA credential revoked or suspended and will no longer be allowed to represent him/herself as a CPDA.

If a CPDA feels they are in jeopardy of not meeting certification renewal requirements by the deadline, they should contact certification@ppdm.org for assistance to plan for any special accommodations. Accommodations will be considered by the Certification Committee and assessed case by case.

Suspension of certification can only be lifted when the minimum cycle PDU requirements are met. From the date of suspension, members can be granted a maximum 12 month grace period to earn and submit PDUs and pay any outstanding fees.

Individuals who have their CPDA certification revoked will be required to reapply to take and pass the CPDA exam.

Certification Status

Your participation in the CPDA Credential Maintenance program and fulfilling its requirements determines your certification status. A certification holder can have one of the following certification statuses:

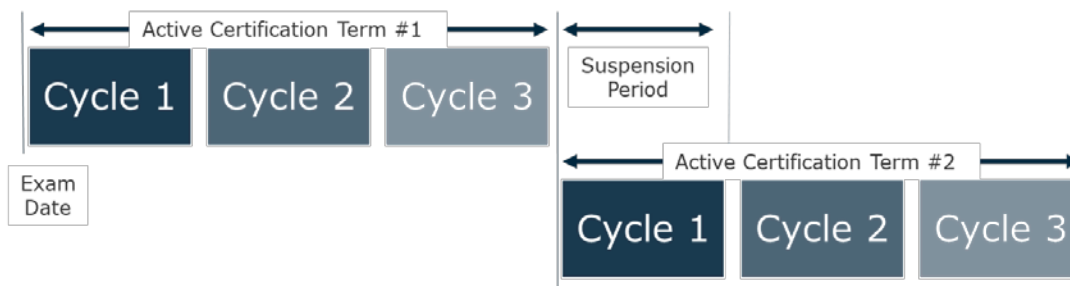
Active Status

When you first earn a certification, you are in active status. When you fulfill all CPDA Credential Maintenance requirements, including earning and reporting PDUs as well as submitting the renewal payment before the cycle end date, you are in good standing with an active status. Certification holders in active status will be automatically listed in the online [CPDA Credential Registry](#).

You have the option to not be listed in the registry, so the absence of your name in the registry does not necessarily mean that you are not certified.

Suspended Status

If you do not satisfy the Credential Maintenance requirements within your current cycle, you will be placed in suspended status. The suspension period can last up to one year (12 months). If you are in suspended status, you may not refer to yourself as a certification holder or use the certification designation until you earn the necessary PDUs or complete the renewal process within the one year suspension period. The date of your next Credential Maintenance cycle will not change after you are reinstated to active status from suspended status. The suspension period overlaps the time frame of your next cycle/term as shown here.



Expired Status

If you do not earn the necessary PDUs or do not complete the renewal process within the suspension period, you will lose your certification and go into an expired status. If you let your certification expire, you may not refer to yourself as a CPDA certification holder or use the certification designation. To attain the certification again, you will be required to reapply by completing a new application, submitting the associated fees and retaking the examination.

Retired Status

If you are a certification holder in good standing and wish to voluntarily relinquish your active status due to retirement, you are eligible to apply for retired status. To qualify, you must no longer earn primary remuneration for practicing and have been a credential holder in good standing for 9 consecutive years.

Once you are in retired status, you do not need to earn or report PDUs. To apply for retired status, submit a written request to certification@ppdm.org.

Appendix - ETHICAL INTEGRITY POLICY

INTRODUCTION

The Professional Petroleum Data Management Association ("PPDM") is committed to ethical integrity in all of its certification programs. PPDM requires that all candidates honour the principles of ethical integrity at all times.

ETHICAL MISCONDUCT

Ethical misconduct includes actions that have a negative effect on the integrity of the certification program. Offences of this nature are unacceptable. As ethical misconduct, can take many forms, the following examples are provided for descriptive purposes and are not intended to constitute an exhaustive list.

It is expected that candidates will familiarize themselves with the actions that are defined as ethical misconduct and ethical dishonesty by PPDM. Candidates who are unclear about what might be considered ethical misconduct should consult PPDM.

1. **Ethical Dishonesty** - Ethical dishonesty is any deliberate attempt to gain advantage by deceiving the administration of PPDM or the Certification Committee. Ethical dishonesty may involve an individual or a group, and includes but is not limited to the following offences:
 - a) **Plagiarism.** Plagiarism is claiming the words, ideas or data of another person as if they were your own. This includes:
 - i) copying another person's work (including information found on the Internet and unpublished materials);
 - ii) presenting someone else's work, opinions or theories as if they are your own;
 - iii) working collaboratively on an examination, and then submitting it as if it were created solely by you; or
 - iv) presents work for a PPDM course or program that in any way compromises the integrity of the evaluation process.
 - b) **Cheating** - Cheating is ethical misconduct which arises during examinations or other evaluation process, including:
 - i) using materials or aids not expressly allowed by the instructor in an examination or test, including but not limited to written or electronic material or any other item not authorized by the instructor;
 - ii) copying another person's answer(s) to an examination or test question;
 - iii) consulting with another person or unauthorized materials during the examination period;
 - iv) improperly submitting an answer to a test or examination question unless specifically permitted by the examination format; or
 - v) improperly obtaining, through deceit, theft, bribery, collusion or otherwise, access to examination paper(s) or set(s) of questions, or other confidential information.
 - c) **Misrepresentation of personal identity or performance.** This includes:
 - i) submitting stolen or purchased assignments or research;

- ii) impersonating someone or having someone impersonate you in person, in writing or electronically. Both the impersonator and the individual impersonated (if aware of the impersonation) are subject to a penalty;
 - iii) falsely identifying oneself or misrepresenting one's personal performance outside of a particular course, in a course in which one is not officially enrolled, or in the application process; or
 - iv) withholding or altering academic information, transcripts or documents.
- d) Submission of false information.** This includes:
- i) making false claims or submitting altered, forged or falsified certificates or other documents to PPDM or the Certification Committee;
 - ii) submitting false statements, documents or claims in the ethical appeals or the ethical misconduct process;
 - iii) submitting false credentials to PPDM; or
 - iv) altering, in any way, documents issued by PPDM.
- 2. Contributing to Ethical Misconduct** - Contributing to ethical misconduct is knowingly assisting someone to commit any form of ethical misconduct. This may include, but is not limited to:
- a) allowing work to be copied during an examination or test;
 - b) offering, giving or selling answers to tests or exams; or
 - c) unauthorized sharing of examination questions and/or answers.
- 3. Damaging, Tampering or Interfering with the Examination Environment** - Obstructing and/or disturbing the activities of others during an examination is ethical misconduct. This involves altering the work of others in order to gain an advantage. Examples include:
- a) tampering with examination answers of others;
 - b) stealing or tampering with any certification-related material.
- 4. Unauthorized Copying or Use of Copyrighted Materials** – Intentionally failing to abide by the Copyright Act regarding the copying and use of textbooks, software, and other copyrighted materials is ethical misconduct.

PENALTIES AND CONSEQUENCES FOR ETHICAL MISCONDUCT

The Certification Committee is responsible for reviewing potential ethical misconduct by candidates, and the assignment of penalties. The process of review and assignment of penalties is as follows:

1. Notice to the Candidate

The Certification Committee will send a notice to the candidate indicating that the candidate's actions are being reviewed for potential misconduct.

2. Review by the Certification Committee and Assignment of Penalties

The Certification Committee will review the potential misconduct, and, if the Committee deems it appropriate, assign a penalty to the candidate.

The penalty imposed will take into account the severity and the specific circumstances of the misconduct. Once the Certification Committee has determined the appropriate penalty, the candidate will be notified. The following list represents the range of penalties that may be imposed:

- a) A grade of "Fail" may be assigned to the candidate for the certification.
- b) The candidate may be suspended from applying for entry into any PPDM certification programs for a specified period [e.g., one (1) or two (2) years].
- c) If the candidate has previously obtained any PPDM certifications, those certifications may be revoked.
- d) The candidate may be banned for life from taking any further PPDM certification programs.

3. Other Consequences

Depending on the nature of the misconduct, PPDM may take court action against the candidate, including civil or criminal charges.

Appeals

Appeals to penalties for ethical misconduct must be in writing and must be received by the Certification Committee in writing no more than thirty (30) days from the date the candidate receives an assignment of penalty.

Decisions will be made by the Certification Committee and will be based on the information and supporting documentation provided in writing by the candidate.