



**Guidelines for
C.P.M. and A.P.P.
Review Instructors**

Guidelines for C.P.M. & A.P.P Instructors

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Introduction

The Institute for Supply Management is pleased to provide you with these C.P.M. and A.P.P. Review Instructor Guidelines. We trust you and your students will find them beneficial.

In May 2001 the National Association of Purchasing Management's (NAPM's) membership voted to change the association's name to the Institute for Supply Management™ (ISM). The association, established in 1915, is the world's leading educator of supply management professionals and is a valuable resource for decision makers in major markets, organizations, and government. This change reflects a recognition of the increasing strategic and global significance of supply management, and became effective January 1, 2002.

Review Course Instructors play an important part in the professional development of supply management professionals. ISM's two professional designation programs; the Certified Purchasing Manager (C.P.M.) and the Accredited Purchasing Practitioner (A.P.P.) exist to define and validate the purchasing and supply management body of knowledge and to acknowledge those who demonstrate proficiency in it. Although ISM does not provide Instructor Certification, we do want to clearly set forth expectations of review program and you're the responsibilities of C.P.M. and/or A.P.P. Review Instructors. ISM does publish a list of registered instructors who agree to meet these expectations and to abide by the ISM Code of Conduct and the ethics statement that appear herein.

To aid you in setting up your Review program we have included information about course types, designing your course, delivery, tips for the class, additional resources available to you and, most importantly, information about the ethical standards that all C.P.M. and A.P.P. candidates and instructors shall be held to by ISM.

ISM established the Certified Purchasing Manager (C.P.M.) program on June 1, 1974. The establishment of the program identified procurement as a professional function with high educational standards and measures of ability and performance. Among the academic and the business communities, it has earned the recognition of, and respect for, purchasing as a key management team member. The C.P.M. program is designed for experienced purchasing and supply managers. It focuses on managerial and leadership skills, plus a variety of specialized functions (e.g., sourcing analysis, supply and inventory management, forecasting) designed to enhance the value of procurement and supply management within an organization. It also covers the operational aspects of the purchasing and supply function, such as identifying requirements, preparing solicitations and agreements, negotiations, technology, quality, and maintaining relationships.

The Accredited Purchasing Practitioner (A.P.P.) program was established in 1995, and was designed for entry-level buyers or others primarily engaged in the operational side of the purchasing and supply function, such as identifying requirements, preparing solicitations and agreements, negotiations, technology, quality, and maintaining relationships. The A.P.P. is also relevant for those involved in purchasing and supply support activities and supply teams.

Certificate vs. Certification –There is a clear distinction between certificate programs and certification programs. It is important that you and your students appreciate the differences between the two.

Certificate Programs: Continuing education programs that are usually 18 to 24 hours in length, sometimes self-study, smaller in magnitude and shorter in time than degree programs; designed to instill, expand, or enhance competencies by learning new skills, attitudes, and performance behaviors.

Certification Programs: Process by which an association or non-governmental agency acknowledges an individual has met certain predetermined qualifications specified by that organization. It is a credential; a formal acknowledgement granted to an individual to designate to the public that this person has met the requirements in the designated area of certification.

C.P.M. and A.P.P. Review programs are meant to be a review of content that will be covered on the Exam. They are not intended to be an educational program where new content is being covered.

Access to Review Programs:

For ISM, diversity is valuing and respecting individual strengths, viewpoints, and contributions. Diversity is a positive asset for ISM's growth and success. ISM values and embraces diversity in the membership. All individuals should have access to C.P.M. and A.P.P. Review Programs and an opportunity to qualify for the C.P.M. and A.P.P. designations.

Choice of Format:

Before you take on any new endeavor, the best way to ensure success is to do constructive planning. In preparing to instruct your C.P.M./A.P.P. review class there are some preliminary steps to consider. Below are two suggestions of things to consider in developing your program:

A: Your Market:

Define and learn your target market. In determining your audience, ask yourself these questions:

- Who am I going to be instructing?
- What type of student am I targeting?
- Is it the entry-level buyer or the more seasoned supply manager?

Identify on paper the background, experience, knowledge level, and position of your target audience. A strong participant profile will help to ensure that the course you design is not too basic, nor too advanced, and that the course content reflects the needs of your audience.

B: Sequencing:

Now that you have determined your target audience, you must determine how and in what format you will present the information. Again ask yourself some questions to lead you to the most effective method for your class:

- When will the course be offered?
- Will it be held one night per week?
- Weekends?
- What time will it start?
- How long will each class last?

After you have determined your audience and answered the questions of when, where and how you are going to present the class – you are almost on your way...

Design of Course:

The C.P.M exam consists of four modules; the A.P.P. exam has two. Each module is broken down into tasks with certain knowledge, skills and abilities (KSA's) related to each task area. The tasks identified on the exam were derived from the findings of a job analysis and were written by professionals and educators in the field.

The design of your course is simple, follow the exam specification for the C.P.M. and A.P.P. exam. Design your course to cover the tasks and KSA's outlined in each module.

The content covered in C.P.M. Modules 1 and 2 are identical to the content covered in A.P.P. Modules 1 and 2. These modules are interchangeable from a certification or accreditation point of view.

MODULE 1- Purchasing Process: includes sections on identifying requirements; preparation of solicitations supplier analysis; and contract execution, implementation, and administration. – 95 questions, 90 scored, 105 minutes

MODULE 2 - Supply Environment: includes sections on negotiations, information technology, quality issues, internal relationships, and external relationships.
– 95 questions, 90 scored, 105 minutes

MODULE 3 - Value Enhancement Strategies: includes sections on sourcing analysis, supply and inventory management, value enhancing methods, and forecasting and strategies. – 95 questions, 90 scored, 105 minutes

MODULE 4- Management: includes sections on management and organization and human resources management. – 120 questions, 110 scored, 130 minutes

MODULE 1: PURCHASING PROCESS (C.P.M. or A.P.P.)

Part A. Identifying Requirements (23 questions)

- 101 Establish procurement plans and make decisions necessary to purchase products or services in congruence with organizational objectives and sourcing strategies (6 questions)
- 102 Review purchase requisitions in accordance with organizational requirements and/or budgetary constraints (3 questions)
- 103 Determine appropriate methods of procurement (6 questions)
- 104 Perform cost/benefit analyses on planned acquisitions (5 questions)
- 105 Review supplier samples and/or demonstrations with the buying organization management and/or user departments (3 questions)

Part B. Preparation of Solicitations (22 questions)

- 106 Develop/review specifications, statements of work, performance terms, and/or acceptance criteria (7 questions)
- 107 Locate and select potential sources of materials or services (6 questions)
- 108 Prepare and solicit competitive bids, quotations, and proposals with pertinent specifications, terms, and conditions (6 questions)
- 109 Manage and develop lists of recommended sources (3 questions)

Part C. Supplier Analysis (19 questions)

- 110 Evaluate competitive offerings to determine the overall best offer for a product/service (8 questions)
- 111 Conduct supplier visits/evaluations to determine suitability (6 questions)
- 112 Measure supplier performance using rating systems and/or predetermined standards (5 questions)

Part D. Contract Execution, Implementation, and Administration (26 questions)

- 113 Prepare and/or issue contracts/purchase orders (4 questions)
- 114 Obtain legal review and approval of a contract when required (5 questions)
- 115 Administer contracts/purchase orders from award to completion (3 questions)
- 116 Expedite deliveries and conduct follow-up procedures when necessary (2 questions)
- 117 Resolve contract/purchase order differences with suppliers (4 questions)
- 118 Resolve payment problems with suppliers and user departments (2 questions)
- 119 Review and revise purchasing practices to ensure their conformance with established laws, policies, and ethical principles (4 questions)
- 120 Manage files of agreements, equipment records, and/or specifications (2 questions)

MODULE 2: SUPPLY ENVIRONMENT (C.P.M. or A.P.P.)

Part A. Negotiations (13 questions)

- 201 Prepare for and develop strategies and tactics for negotiations (7 questions)
- 202 Conduct negotiations with potential and/or current suppliers to obtain maximum value (6 questions)

Part B. Information Technology (16 questions)

- 203 Develop/utilize a computerized purchasing system (e.g., online buying, EDI, Web-based electronic commerce) (6 questions)
- 204 Develop/implement/maintain a database of specifications, suppliers, products, and/or services (5 questions)
- 205 Develop/utilize a computerized inventory and/or capital equipment tracking system (5 questions)

Part C. Quality Issues (12 questions)

- 206 Resolve quality problems with suppliers and user departments (6 questions)
- 207 Develop measurements for quality improvement and target setting (e.g., "best in class" benchmarks) (6 questions)

Part D. Internal Relationships (22 questions)

- 208 Develop/manage/evaluate relationships with other internal departments (6 questions)
- 209 Participate in cross-functional and/or multifunctional teams (e.g., project management, process improvement) (6 questions)
- 210 Recommend/implement changes to the organization's purchasing, supply management, and material usage policies as needed (5 questions)
- 211 Disseminate information and provide training related to purchasing and supply management policies and procedures (5 questions)

Part E. External Relationships (27 questions)

- 212 Develop/manage effective relationships with suppliers, utilizing such techniques as supplier partnerships, strategic alliances, supply chain management, and supplier training programs (7 questions)
- 213 Review product availability and/or pricing information with suppliers (6 questions)
- 214 Conduct interviews with current and prospective supplier sales personnel (3 questions)
- 215 Coordinate/review/respond to supplier inquiries, protests, and appeals (3 questions)
- 216 Develop/implement a small business/disadvantaged supplier development program (5 questions)
- 217 Represent the buying organization in meetings with corporations, government agencies, professional associations, media, and other organizations (3 questions)

MODULE 3: VALUE ENHANCEMENT STRATEGIES (C.P.M. Only)

Part A. Sourcing Analysis (17 questions)

- 301 Conduct decisions to “make or buy,” privatize, or outsource products or services (7 questions)
- 302 Conduct decisions to lease or buy equipment (5 questions)
- 303 Develop financing and leveraging strategies for purchases (5 questions)

Part B. Supply and Inventory Management (19 questions)

- 304 Organize, control, and minimize the storage of materials (6 questions)
- 305 Meet with appropriate departments to discuss current material inventories, and establish restock levels or just-in-time strategies (6 questions)
- 306 Determine sources of and reconcile inventory discrepancies (3 questions)
- 307 Handle obsolete equipment/materials, surplus equipment/materials, and scrap (4 questions)

Part C. Value Enhancing Methods (26 questions)

- 308 Develop/implement a standardization program (6 questions)
- 309 Develop/implement a process improvement program (7 questions)
- 310 Develop a cost reduction, cost avoidance, cost containment program (e.g., value analysis, consolidation of orders/suppliers, leadtime reduction, activity-based costing) (7 questions)
- 311 Coordinate the introduction of new and modified products and services with appropriate departments (6 questions)

Part D. Forecasting and Strategies (28 questions)

- 312 Plan purchasing, sourcing, and supply strategies based on forecasted data (6 questions)
- 313 Develop supply plans and strategies based on forecasts of future demand (6 questions)
- 314 Provide forecasted data of future organization buying requirements to suppliers (5 questions)
- 315 Develop and maintain market awareness through merchandise shows, trade periodicals, and other resources to secure new product and pricing information (5 questions)
- 316 Provide data on current and future market conditions to management, sales management, and/or user departments (6 questions)

MODULE 4: MANAGEMENT (C.P.M. Only)

Part A. Management and Organization (61 questions)

- 401 Develop strategic plans and objectives (short- and long-term) (11 questions)
- 402 Develop goals and objectives of purchasing and supply department aligned to organizational goals (11 questions)
- 403 Plan/develop/provide operating policies, guidelines, and procedures (9 questions)
- 404 Prepare periodic reports of department activities for senior management and other areas of the organization (7 questions)
- 405 Analyze and resolve issues raised in purchasing and supply audit reports (5 questions)
- 406 Develop/utilize criteria for evaluating purchasing and supply department performance (8 questions)
- 406 Prepare and/or administer a purchasing department/supply management budget (7 questions)
- 408 Design, modify, and/or manage operational forms (paper and/or electronic) (3 questions)

Part B. Human Resources Management (49 questions)

- 409 Supervise and lead purchasing and supply staff (11 questions)
- 410 Hire, promote, and/or dismiss purchasing and supply personnel (8 questions)
- 411 Evaluate purchasing and supply staff performance (8 questions)
- 412 Conduct/authorize job training for the development of the professional competence of the staff (9 questions)
- 413 Resolve employee performance problems (7 questions)
- 414 Implement programs to prevent and respond to discrimination or harassment (6 questions)

*A minimum of twenty-five of these questions will test the candidate at the application level.

Course:

1. Expectations:

- ISM expects that Instructors will:
 - Provide accurate information to the students
 - Know the requirements for the current C.P.M. and A.P.P. programs and application processes and where to direct questions within ISM
 - Possess current subject matter knowledge and be a lifelong learner by participating in professional growth activities
 - Fulfill course objectives and use allocated class time productively
 - Be ethical in the classroom and adhere to the ISM Code of Conduct and the Ethics Statement that appear in later in these Guidelines
 - Adhere to all copyright laws
 - Regularly update and improve course through use of participant surveys and input
 - Already possess the designation for which the course is targeted (C.P.M. and/or A.P.P.).

- Students should expect:
 - That the course content follows the current content of the Exam
 - That the Instructor is prepared for each class
 - That they will understand the format of the Exam
 - That taking a review course does not guarantee passing the Exam

- Instructors should expect that ISM will:
 - Be a resource to them and their students
 - Provide accurate and timely information regard the program and application requirements and any updates or changes being planned or made

2. Objectives: Writing a course objective can be as simple as defining what the attendee will be able to do after attending the course. You should draft an overall course objective and then up to 10 specific objectives. Take care to be realistic about what your objectives are and to quantify them where possible.

3. Content: Select an organized design approach. There are many approaches that can be used; however, it is important to select the one you think will give you the best structure for your subject matter and will be easiest for attendees to follow. Several examples are listed for your consideration: (a) from the overall “big picture” and theory down to the nuts and bolts details, (b) from basic concepts and tasks to the “big picture”, (c) from a review of prior knowledge to updates on current issues, (d) from the “beginning” of a task or process to the “end”.

4. Format: Groups with 30 or more participants and technical topics are more conducive to lecture formats with Q & A periods. With groups of less than 30, an interactive format can be used, such as case studies, exercises and group discussion. However, interactive formats are more difficult and time consuming to design.

Note: Portions of these instructional design tips adapted with permission from an article in an American Society of Association Executives ASAE *Education Section Council Newsletter*.

Delivery:

With regard to delivery of the course, you should consider such things as:

- What kind of visual aids will you use? (Refer to ISM and You – Resources) Create any handouts, key exercises, cases and discussion questions prior to starting any classes.
- How do you prepare for each session?
- Provide the schedule for each session at the first class meeting along with contact information for you, ISM and any other relevant persons.
- Provide a listing of the preparation requirements for the students for each session.
- Draft a timeline of how long you think each section of the review program will take. Don't forget to allow for introductions, administrative items, lunches, breaks, etc. Make sure that your time line reflects changes in direction or format at least every hour. Adult learners need and want variety and a change of pace.
- Update your course with the feedback from your participants. Collect information on an on-going basis to add to the course materials.

Delivery suggestion: For classes lasting more than one session

At the beginning of each class, review the previous class. Set up the current one with a listing of the objectives for that class. End each class with a review of the objectives from that class and a preview of the objectives for the next class. This is a common teaching technique that provides for continuity from class to class.

Class Tips for Instructors

- Always start on time (don't punish those who were on time by waiting)
- Go to class prepared
- Encourage interaction and involvement
- Place emphasis on feedback
- Be available to the students
- Never spend more than 20 minutes on the same subject
- Every 8 to 11 minutes interrupt your pattern (talk differently, change overheads, ask a question, have students turn a page, etc.)
- Don't allow one student to dominate the class
- Establish objectives for each class and focus on the results of the class.
- Be sensitive toward others
- Have fun!

Your Role as Facilitator

You are in the position to pay attention to where the group is headed as learning occurs. Your words and actions provide support and encouragement while providing redirection if necessary.

As outlined in the ASAE document *Facilitating Adult Learning* (1997) facilitators must have the following communication skills:

- **Explaining** – material or ideas in a variety of ways; rely on examples, metaphors to emphasize similarities, connections
- **Analyzing** – to help learners make distinctions among options; this is especially important to help people refine judgement skills
- **Managing** – group process; maintaining a positive, graceful control of the group; neutralizing strong personalities, drawing out the reticent participants; resolving impasses; avoiding fruitless tangents.
- **Questioning** – to stimulate the range of cognitive skills; remembering, understanding, analyzing, integrating, evaluation. Using open-ended questions to promote discussion. Questions help participants internalize rather than simply remember material.
- **Motivating** – participant to learn; inspiring and exciting them about the material and the profession; instilling confidence in candidates concerning their abilities.

Ethics:

The distinguishing characteristic of a profession is the ability to combine ethical standards with the performance of technical skills. In fact, "professional" is described in Webster's New Collegiate Dictionary as "characterized or conforming to the technical or ethical standards of a profession." Webster's goes on to describe "ethic" as "a theory or system of moral values, the principles of conduct governing an individual or group." In order to achieve stature as a profession, the purchasing profession must establish and subscribe to a set of ethical standards to guide our individual and group actions.

ISM's Principles and Standards of Purchasing Practice with Accompanying Guidelines are established to encourage adherence to an uncompromising level of integrity. They are designed to heighten awareness and acceptance of appropriate conduct. They are not intended to supplant company policies pertaining to ethical practice. These Principles and Standards of Purchasing Practice with Accompanying Guidelines are intended to be a model for your consideration. Further, they are recommended as guidelines to all those who influence the purchasing and supply management process.

Information contained in this document is intended to provide insight in handling difficult day-to-day issues. Bear in mind that standards and guidelines cannot take the place of good judgment. When in doubt, consult ISM, professional colleagues ... and your conscience.

An easy way to determine whether you should do something or not is to ask how would you feel to see the action you took on the front page of the newspaper. Would you be embarrassed or proud?

ISM expects that each Review Instructor will abide by ISM's Principles and Standard of Purchasing Practice as listed below: (Domestic and International)

1. Avoid the intent and appearance of unethical or compromising practice in relationships, actions, and communications.
2. Demonstrate loyalty to the employer by diligently following the lawful instructions of the employer, using reasonable care and only authority granted.
3. Refrain from any private business or professional activity that would create a conflict between personal interests and the interests of the employer.
4. Refrain from soliciting or accepting money, loans, credits, or prejudicial discounts, and the acceptance of gifts, entertainment, favors, or services from present or potential suppliers that might influence, or appear to influence, purchasing decisions.
5. Handle confidential or proprietary information belonging to employers or suppliers with due care and proper consideration of ethical and legal ramifications and governmental regulations.
6. Promote positive supplier relationships through courtesy and impartiality in all phases of the purchasing cycle.
7. Refrain from reciprocal agreements that restrain competition.
8. Know and obey the letter and spirit of laws governing the purchasing function and remain alert to the legal ramifications of purchasing decisions. Encourage all segments of society to participate by demonstrating support for small, disadvantaged, and minority-owned and woman-owned businesses.

9. Discourage purchasing's involvement in employer-sponsored programs of personal purchases that are not business related.
10. Enhance the proficiency and stature of the purchasing profession by acquiring and maintaining current technical knowledge and the highest standards of ethical behavior.
11. Conduct international purchasing in accordance with the laws, customs, and practices of foreign countries, consistent with United States laws, your organization policies, and these Ethical Standards and Guidelines.

(Approved January 1992)

ISM also expects that each Instructor will abide by the statement below and that the Instructor will review this statement with the class at the **first** class or **introductory** session. ISM takes allegations of impropriety very seriously. It is ISM's responsibility to protect the integrity of the Examination and the program. All candidates (for either program) will be required to sign signifying their agreement with this statement which appears on all C.P.M. and A.P.P. Registration forms and Applications.

I certify that because of the confidential nature of this examination, I will not copy, retain examination questions, or disclose or transmit them in any form to any other person. I hereby state that I am working toward my C.P.M. and/or A.P.P. designation or taking modules to meet the continuing education requirements for recertification/ reaccreditation. I understand that taking the exam for any other purposes is strictly prohibited. I further hereby agree and understand that certification/accreditation may be denied or revoked, or C.P.M. or A.P.P. Examination (the "Exam") scores may be invalidated by the Certification Committee of ISM (the "Committee") in the event that the Committee determines that an individual has (i) falsified or misrepresented information on any certification application or registration forms, or if information provided in support of obtaining or maintaining certification or accreditation is found to be in error; (ii) participated in an unauthorized disclosure of examination questions, information, or materials; (iii) plagiarized questions and/or answers on the Exam; (iv) mailed, received, relayed in any fashion, or used copies of the Exam materials, questions, or answers without authorization from ISM; (v) retained the Exam materials after the examination; (vi) engaged in other nonprofessional behavior or dishonesty with respect to taking, administering, or the preparation of others to take the Exam which results in compromising the integrity of the examination; or (vii) failed to adhere to the Principles and Standards of Purchasing Practice. I agree to abide by the ISM Principles and Standards of Purchasing Practice, whether or not I am a member of ISM. I grant ISM permission to make any and all inquiries, which are necessary to evaluate my credentials for certification/ accreditation, recertification/reaccreditation, or Lifetime certification/accreditation and agree to respond to requests for information related to any of the above. I further authorize ISM to publish (via e-mail, Web site, or print) information about my certification/accreditation and to make any and all inquiries, investigations, or other communications, which may be necessary for the Committee to grant, deny, or revoke certification/accreditation, or to invalidate examination scores. I hereby certify that the information submitted on or with this form is true and accurate to the best of my knowledge, and I agree to be bound by the terms and conditions set forth herein and by any and all policies and procedures of ISM applicable to the C.P.M. and/ or A.P.P. program as may be amended from time to time.

Commonly Misunderstood Program Aspects to Share with Students

1. Study material produced by ISM should *not* be the only material used by the student to study. This material should be supplemented. The candidate should also be reminded to expand their study beyond the scope of purchasing and supply-focused material as appropriate.
2. One of the most common complaints ISM continues to hear about the exam relates to exam content. Individuals attending review programs expect to see questions on the exam that come from the material covered by the Instructor. It is important to explain the type of exam being offered and the procedure used to select topics for questions. Candidates often focus on the practices within their particular organization or industry instead of the profession as a whole.
3. The certification and accreditation processes are designed to measure competency. However, learning is usually also an outcome associated with obtaining the C.P.M. or A.P.P.
4. Pass/fail criteria of the exam are different from that of a typical college test. A high achiever would expect to answer 90% or more questions correctly on a college test to perform well. For example, prior to the most recent update to the exam, to receive a "pass" score on Module 1 of the C.P.M. exam, a candidate had to answer 48-52 of 80 questions correctly.
5. Questions on the exam appear more "ambiguous" than the typical student would experience on a college exam. If the candidate is aware of this before testing, it is likely that they will be more comfortable with the testing process. (Also see material on exam process levels in the Exam Specification and Instructors Guide).
6. Many candidates working toward recertification and/or reaccreditation are unaware of the broad spectrum of educational activities eligible for continuing education hours. All educational activities, even those not sponsored by ISM, are eligible for continuing education hours, as long as length and subject content criteria parameters are met.
7. The best source of written information on certification and accreditation is in the appropriate application form and the exam registration form. These forms provide specific and detailed information on program parameters and documentation requirements.
8. Encourage candidates, and their employers, to take advantage of the Continuing Education Hours documentation process.
9. Explain to candidates that the scaled score is not a percentage.
10. Ask candidates to carefully read the material provided in ISM registration forms and applications.
11. Candidates often focus on the requirements within their industry, rather than the profession as a whole.

ISM and You

Resources:

- ISM has available for Instructors the Task Overview as a word document that can be printed onto overhead transparencies for use in review courses. This document is available on the Web site under 'Review Instructor Guidelines and Tools'.
- C.P.M. / A.P.P. Automatic Telephone Messaging System - 800/888-6276, ext. 3027. - This automated system provides recorded information about certification, accreditation, and continuing education matters.
- ISM's Home Page - <http://www.ism.ws>
- Certification email address: certification@ism.ws
- Althea (Al) Levine (extension 3094) - Processes C.P.M. and A.P.P. applications
- Judy Tolliver (extension 3044) - Processes continuing education hours forms and performs department administrative duties
- David Migliore (extension 3074) - Assists in the day to day administration of the C.P.M. and A.P.P. programs, supervises the continuing education hours documentation program, sets up special test centers, and handles other matters
- Karen P. Collins, C.P.M., A.P.P., Manager – Certification (extension 3123) - Directs activities of the department and all related programs and policy matters
- Christina Foster, SPHR – Vice President of Certification and Diversity (extension 3011) – Develops new international alliances and advances the certification process
- Customer Service (Extension 401) – to order exam forms, applications for certification, and C.P.M. or A.P.P. study or other materials and to obtain answers to general questions
- ISM's C.P.M. and A.P.P. Instructor Information Program – This program is designed for the new review instructor or instructors who had review programs prior to the release of the current exam specification (available since January 1, 2001). You will learn the knowledge, skills, and ability each candidate is required to master to pass the examination, complete details of each program, and how to write and review questions using the same techniques used to develop questions for the examination.

Bibliography:

The item numbers shown below each product refer to the product numbers required to order the products from ISM. Product orders are accepted by phone, fax or online.

C.P.M. and A.P.P. Overview Video

This free video offers an overview of the Certification and Accreditation programs, reviews the new exam requirements, and suggests appropriate study materials.

Item #PLCPM0

C.P.M. Study Guide/A.P.P. Study Guide

The essential tool for exam preparation, the C.P.M. and A.P.P. Study Guide are a comprehensive study aid that presents examples of the testing format and questions styles used in the C.P.M. and A.P.P. Exams. The Guide includes a general overview of the exam, material covered, and recommendations for areas of further study. While the Study Guide provides an overview of the typical materials covered on the exam, it is not meant to substitute for any of the major textbooks in the field.

C.P.M. Item #1002

A.P.P. Item # APP0

C.P.M. Exam Specifications and Instructor's Guide

A.P.P. Exam Specification and Instructor's Guide

This text provides both a general overview and details of the exam specifications of the C.P.M. or A.P.P. Exam and reviews the major parts and tasks of each module as well as the skill sets required for each task.

C.P.M. Item #CPMES

A.P.P. Item # APPES

C.P.M. Diagnostic Kit/A.P.P. Diagnostic, Print Version (no site license available)

A critical exam preparation resource, this kit offers a full-length practice exam complete with a grading scale, correct answers, and answer explanations. The kit helps you identify areas of strength or weakness and highlights your study needs. To be used with the C.P.M. or A.P.P. Study Guide.

C.P.M. Item #NDK0

A.P.P. Item # APPDK0

C.P.M. Diagnostic Kit on Disk Volumes I and II (site license available)

Turn your computer into your own personal C.P.M. or A.P.P. Exam tutor! The C.P.M. and A.P.P. Diagnostic Kits on Disk provide feedback after each question, or conduct an entire timed practice exam to simulate actual testing conditions. Software includes complete scoring, correct answers, and correct answer explanations. Includes C.P.M. or A.P.P. Bibliographic Reference Key. For use with the C.P.M. or A.P.P. Study Guide. C.P.M. and A.P.P. Diagnostic Kit on Disk for Windows 95, 98, and 2000. Requires PC with 80486DX/66 processor or higher, and 32 MB of memory. Each module is on 3.5" disks and is purchased separately. All modules contain 2 disks.

Volume I

C.P.M. Item #CPMKDK1 - Module 1

C.P.M. Item #CPMDKD2 - Module 2

C.P.M. Item #CPMDKD3 - Module 3

C.P.M. Item #CPMDKD4 - Module 4

Volume II

C.P.M. Item # CDKV21D – Module 1
C.P.M. Item # CDKV22D – Module 2

C.P.M. Item #CDKV23D – Module 3
C.P.M. Item #CDKV24D – Module 4

A.P.P. Diagnostic Kit on Disk Volume I and II (site license available)

Volume I

A.P.P. Item #APPDKD1 – Module 1
A.P.P. Item #APPDKD1 – Module 2

Volume II

A.P.P. Item #ADKV21D – Module 1
A.P.P. Item #ADKV22D – Module 2

Articles for C.P.M. Exam Preparation/Articles of A.P.P. Exam Preparation

A must-have supplementary study guide, plus a useful tool to use on the job, this text is a compilation of articles from ISM publications offering an important review for the C.P.M. and A.P.P. Exam.

C.P.M. Item #AFEPC0

A.P.P. Item # AFEPA0

C.P.M. Bibliographic Reference Key/A.P.P. Bibliographic Reference Key - Volumes I and II

These volumes list key sources for reading and corresponds directly to the C.P.M. and A.P.P. Study Guides. Articles are referenced by their relevant exam questions to precisely establish your study needs.

Volume I

C.P.M. Item #1001

Volume II

C.P.M. Item # 10012

Volume I

A.P.P. Item # 2001

Volume II

A.P.P. Item #20012

Exam Preparation and Review Video Course

This video version of the Study Guide offers a comprehensive review opportunity for candidates preparing for the C.P.M. and A.P.P. Exams. Also included is a set of program materials—perfect for self-study or as an instructional aid in a group exam preparation course!

C.P.M. and A.P.P. Item #ERC1 — Module 1 (two tapes)

C.P.M. and A.P.P. Item #ERC2 — Module 2 (one tape)

C.P.M. Item #ERC3 — Module 3 (two tapes)

C.P.M. Item #ERC4 — Module 4 (two tapes)

The Purchasing Handbook

Editors in Chief: Joseph L. Cavinato, Ralph G. Kauffman

This fundamental reference guide assists in answering everyday questions from purchasing professionals in any size organization and includes chapters on e-commerce, technology, strategic alliance, global procurement, supplier price and cost analysis, and performance evaluation.

Item #4

The Supply Management Knowledge Series™ is a vital resource for professionals preparing for the C.P.M. Exam. Each book in the four book series addresses the content of the exam. Each chapter concludes with a summary of key points as well as review questions

- **The Supply Management Process**

Alan R. Raedels

This volume centers on the fundamentals of the purchasing and supply field and reviews the critical elements of the requisition process, cost analysis, and management, sourcing and supplier evaluation, the competitive bidding process, legal issues, and sample contract terms and conditions.

Item #KS1

- **The Supply Management Environment**

Stanley E. Fawcett

This book focuses on the strategic importance of supply management and the effect today's rapidly changing environment has on the profession. Details on the impact of globalization and time compression, e-business, resource planning systems, and the trends transforming purchasing strategy.

Item #KS2

- **Supply Management for Value Enhancement**

Lisa M. Ellram & Thomas Y. Choi

This volume bring emphasis to the variety of ways the supply management process adds value to the organization and covers all aspects of value enhancement, well beyond basic cost saving measures.

Item #KS3

- **The Supply Management Leadership Process**

Anna E. Flynn & Samuel D. Farney

Solid management and visionary leadership are critical to the success of purchasing. This book underscores the importance of strategic planning, applying key theories of motivation, major issues in selection, recruitment, retention, and continuing education of supply management personnel.

Item #KS4

Glossary of Key Purchasing and Supply Terms

This reference provides a collection of current purchasing and supply terminology used in the purchasing and supply community.

Item #GL

Job Analysis Report

A comprehensive job analysis study describing methods and results for purchasing and supply management functions. The focus is on important, up-to-date information about the present state and future direction of the field. This Job Analysis was the basis for the updating to the C.P.M. and A.P.P. Exam which went into effect on January 1, 2001.

Item #JAR01

Also available are other texts not published by ISM:

Purchasing and Supply Management (6th Edition)

Donald W. Dobler, David N. Burt

A best-selling classic that covers the basics and follows the changing role of purchasing in today's working world. Areas cover global sourcing, supply chain management, cross-functional teams, commodity management/sourcing, specification development, TQM, strategic alliances, JIT and outsourcing.

Item #D5

Purchasing and Supply Chain Management (2nd Edition)

Robert M. Monczka, Robert J. Trent.

This newly updated 2nd edition is a result of in-depth discussions with leading purchasing executives. Emphasis is on the contributions that purchasing and supply chain management can make to corporate and business strategies through the development of integrated procurement and sourcing tactics.

Item #B04

Purchasing Principles and Applications (8th Edition)

Stuart Heinritz, Paul V. Farrell, Larry Guinipero, Michael G. Kolchin.

This book covers principles and procedures in purchasing – strategy and planning, ethics, supplier selection, and technology management. Suggested for training programs, or as an introduction for new employees. Contains case studies.

Item #B2

Purchasing and Supply Management (12th Edition)

Michiel R. Leenders, Harold E. Fearon

A leading text for purchasing and supply management courses, practical case studies help you gain a more thorough understanding of issues including continuous improvement, focused operations, participatory management, and global competition.

Item #K1

The Purchasing Machine

Dave Nelson, Patricia E. Moody, Jonathan Stegner

Every day, organizations leave billions of dollars in invisible, unrealized savings on the table because of poor supply chain management practices. In this book the authors show not only how leading companies recoup these savings through their mastery of target costing, value engineering and supplier development but how supply management –the discipline of acquiring and moving material – has become a manufacturing company's hottest weapon.

Item #B37



**Acknowledgement of Receipt of
ISM Guidelines and Information
for C.P.M. and A.P.P. Instructors**



I acknowledge by my signature below that I have reviewed and understood the ISM Guidelines for C.P.M. and A.P.P. Review Instructors. I state that I will not support or condone inappropriate discussions of exam content, questions or answers in my review classes. I also agree that I will honor all copyrights with regard to ISM published materials.

Name of Instructor: _____

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Address: _____

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Fax Number: _____

I am willing to instruct in the following states:

Please complete this form and fax it back to 480/752-7890 Attn: Judy Tolliver

Appendix A:

The Continuing Education Hours Process

The Institute for Supply Management (ISM) provides an important and free service called the Continuing Education Document Request process. Its purpose is to standardize and streamline the documentation of continuing education hours claimed by candidates taking advantage of the Certified Purchasing Manager (C.P.M.) and Accredited Purchasing Practitioner (A.P.P.) programs offered through ISM.

ISM will review any educational event that is purchasing, materials management, or general business related and is not eligible for college credit. This includes events such as seminars, conferences, and in-company programs. There are three ways to get the Continuing Education Documentation Request Form:

- By filling the form out Online on our Web site
- By printing out the Adobe Acrobat version of the form from our Web site.
- By emailing certification@ism.ws
- By calling the Certification Department at 800/888-6276 or 480/752-6276, extension 3044.

The path to the Web site is www.ism.ws, then select 'Certification', then 'Continuing Education Hours (CEH)', then you can register online your program online or download a form to complete. You will find these options under the subheading 'Purpose and Structure of the Continuing Education Documentation Process.'

You will receive:

- Information on how to reference the C.P.M. and/or A.P.P. programs in your literature
- A standard Achievement Award form to copy and present to each attendee,
- A standard evaluation form for each attendee to complete, and
- Instructions on what information to return to ISM.

Remember as an instructor, you have the authority to revise the hours earned by a student if they are not present for all of the educational contact hours indicated on your program request form. After review of the material submitted, ISM will let you know the number of hours the educational event is worth.

The issuance of a program number and assignment of CEHs to a program do not constitute endorsement or sponsorship of the program or the program's content.