

President and Executive Director's Report

Growth Brings Diversity, Broader Needs, and Ultimately Change

Sometimes the abundance of topics can make a communication just as difficult to produce as a lack of options. This is certainly true when it comes to addressing NOCA members. After taking a look at the wonderful articles provided in this edition of the NOCA News there was one area that seemed to jump out at us: the diversity of interests and topics that are relevant to our membership.

We were struck by the continued growth in diversity of NOCA membership, which is surely a testament to the continued increasing value of our organization. We would like to welcome the eight new members who have joined us (see Member News) and acknowledge the diverse industries they represent, including, financial management, international trade, fitness trainers, and strategic alliance specialists. As some of you may know, over 30 years ago NOCA's original mission was focused on the development of quality standards and accreditation programs focused on the health care industry. Today, over 50% of NOCA members are from non-health related fields. This is not a reflection of the health fields reducing, but of the continually increasing value placed on credentialing in more and more fields. We have come a long way; however, this growth reminds us of how diligent we must be to continually understand our member needs and implement programs and services that fulfill those needs.

NOCA has maintained that diligence through a disciplined, data driven approach. Over the last two years, the NOCA Board has invested in the development of an education and training strategy that best serves the needs of the credentialing community. As a result of this effort, NOCA is offering a growing number of products and services that truly benefit our members, such as: Certification 101 Online modules; governance training; increased Web Seminars; increased networking opportunities (have you visited our [Web site](#) lately and accessed our Linked-In and Members Only chat rooms?). Starting with this issue of NOCA News, NOCA members in the legal profession are volunteering their valuable time to provide a new "Legal News" column. Finally, at the request of our members, we have initiated the development of a job analysis study for the certification professional. This will provide a psychometrically sound and valid study defining the knowledge and skills required of our profession. Each of these products and services is designed to assist our ever-growing and changing membership, while adhering to NOCA's root mission to promote excellence in credentialing.

NOCA's recent publication of *ANSI/NOCA 1100 – Assessment Based Certificate Programs*, the first American National Standard published covering these types of certificate programs, is another example of NOCA's increased diversity both in the types of products and services provided by NOCA members and the serving of new markets in the education and training fields. We encourage you to participate in the upcoming free Web Seminars being offered in June 25 and 26 to all interested stakeholders to discuss the standard and the potential of building an accreditation program based on the ANSI/NOCA 1100 Standard. As always, we remain committed to developing standards and accreditation programs in

an open and transparent process. For more information about the Web Seminars please visit our Web site at www.noca.org.

We must also acknowledge and appreciate how our community has grown geographically and how the interests of our membership have expanded to a global scale. As you will note in reading this newsletter, you will see discussions on international standards and the processes used to develop those standards as well as recently published standards having a direct impact on our members. NOCA is proud to be participating on the international ISO working group developing revisions to ISO 17024, *Conformity Assessment – General Requirements for Bodies Operating Certification of Persons*, as well as participating on the U.S. Technical Advisory Group on ISO PC 230 on Psychological Assessment. NOCA members will be receiving information on these initiatives in the near future.

Growth, diversity, new products and services, international presence, increased needs from the credentialing community we serve – NOCA is keeping pace with all of these factors. They are also representative of why the NOCA Board has recently put out a ballot to the membership to change our name to the Institute for Credentialing Excellence. If you have not already submitted your ballot please do so. The NOCA Board has spent a significant amount of time in conducting the proper due diligence and in obtaining membership feedback before making the recommended name change.

With diversity comes adaptability, which is the key to our long term success. By adopting a new name that better represents what we do, and by providing new offerings to members, NOCA will be positioned to continue to meet the increasing diversity and needs of the community we serve.

Sincerely,



Paul Grace, MS, CAE
President



Jim Kendzel, MPH
Executive Director

Headline Articles

USPTO Statement Supports and Endorses Consensus-Based Standards and the Private Sector-Led U.S. Standardization System

New York April 14, 2009 (First printed in the ANSI Newsletter)

A [recent statement](#) by the United States Government, delivered by the [United States Patent and Trademark Office](#) (USPTO), expressed strong support for the private-sector led and public-sector supported U.S. standards system and for the use of standards developed through an open and consensus-based process.

The statement, given at the March 25, 2009, meeting of the [World Intellectual Property Organization](#) (WIPO) [Standing Committee on the Law of Patents](#) (SCP), took a firm stand that “there is NOT a crisis, as claimed by some, in standard setting” in this country. Specifically, the presentation stated:

In [the U.S. government's] view, the standard setting process should be voluntary and market-driven. Unnecessary government intervention can impair innovation, standards development, industry competitiveness, and consumer choice....The U.S. government recognizes its responsibility to the broader public interest by providing financial support for, and promoting the principles of, our standards setting system globally. U.S. industry competitiveness depends on standardization, particularly in sectors that are technology driven. The United States doesn't encourage government intervention. The issues have long been discussed and are rejected because they hinder innovation, standards development, U.S. industries' competitive advantage and attendant benefits to consumers. (Emphasis added.)

The presentation also outlined the benefits of open standards, and the USPTO stated the "United States supports and strongly encourages the use of open standards, as traditionally defined, that is, those developed through an open, collaborative process, whether or not intellectual property is involved." (Emphasis added)

The term "open standard" has been used recently by some to describe a standard that may be copied, used, and distributed for no fee and/or whose embedded technology is irrevocably available on a royalty-free basis. This definition has created some confusion among standards developers and users generally because it is contrary to the process-based definition of "open" and "openness" long held by the [American National Standards Institute](#) (ANSI) and followed by ANSI accredited standards developers such as NOCA. This traditional definition is in alignment with the policies of the [International Organization for Standardization](#), the [International Electrotechnical Commission](#), and Annex 4 of the Second Triennial Review of the World Trade Organization Technical Barriers to Trade Agreement.

According to the USPTO, standards developed through an open process improve interoperability, facilitate interactions ranging from information exchange to international trade, and foster market competition. They can also offer a balance of private and public interests that can protect intellectual property with fairness, disclosure policies, and reasonable and nondiscriminatory licensing. The statement reads:

In our view, the standard setting process should be voluntary and market-driven. Unnecessary government intervention can impair innovation, standards development, industry competitiveness, and consumer choice. While encouraging innovation, a properly structured public and private partnership can potentially balance the interests of patent holders which endeavor to exploit their patents, with those of producers which want to license and produce the goods covered by the standards at reasonable prices, and of the public which seeks the widest possible choice in the marketplace among interoperable products.

ISO/IEC E-Learning Standard will Help Match User Needs with the Right Resources

An ISO/IEC International Standard on e-learning will make it easier to match individual user needs and preferences with the right educational resources. **ISO/IEC 24751:2008, *Information technology – Individualized adaptability and accessibility in e-learning, education and training***, is published in three parts. It offers a framework and reference model, plus "access for all" criteria on personal needs and preferences, and a digital resource description.

ISO/IEC 24751 aims to meet the needs of learners in the context of "disability," which it views as a consequence of a mismatch between the learner's needs (or preferences) and the education or learning experience delivered.

For example, an individual who is blind is not disabled when the lesson is delivered in audio. However, an individual who does not have the necessary background knowledge to understand the lesson, or who is listening to the lesson in a noisy environment, is disabled. Thus, the needs and preferences of a user may arise from the user's context or environment, the technical requirements of the user's device, the tools available (e.g. assistive technologies such as Braille devices, voice recognition systems, alternative keyboards, etc.), the user's background, or a disability in the traditional sense.

Given this reframing of the meaning of "disability," a learning environment is deemed as "accessible" when learner needs can be addressed or matched.

ISO/IEC 24751, Part 1, provides a common framework to describe and specify learner needs and preferences and the corresponding description of the digital learning resources, so that individual learner preferences and needs can be matched with the appropriate user interface tools and digital learning resources.

ISO/IEC 24751, Part 2 provides a common information model to describe how a user desires to access online learning content and related applications. It includes how needs and preferences can be ranked with respect to priority, and the use of generic and application-specific needs and preference specifications.

ISO/IEC 24751, Part 3 provides a common language for describing aspects of a computer system (including networked systems) to facilitate their being matched to learners' accessibility needs and preferences. This part also describes application information scenarios and gives informative implementation examples.

For people with disabilities, whose choice of access modalities is restricted, the process of matching a resource with a user requirement is not a matter of convenience or refinement, but one of utmost importance in ensuring access. Use of ISO/IEC 24751 will assist in matching individual learner needs in a computer-mediated learning environment with the necessary user interface and resources needed to meet those needs.

This latest publication was developed by joint technical committee ISO/IEC JTC 1, *Information technology*, subcommittee SC 36, *Information technology for learning, education and training*. It is available from ISO national member institutes (see the [complete list](#) with contact details).

Ten Simple Strategies That Make Boards Better

1. Use a “balanced measures” approach to measure organizational performance

Organizations in the last decade have adopted a “balanced measures” approach to judging performance. Business results have always been prominent. Now progressive organizations also measure customer/client value and employee engagement. Balance is a relative term. The three measures are linked to one another so closely in the business literature that keeping a close eye in each of the three categories provides boards a full spectrum view of enterprise performance.

2. Create a simple set of dashboard indicators to review at each meeting.

Balanced measures requires a reporting system that can be grasped easily and reported with monthly / quarterly frequency. The “dashboard” metaphor suggests how Boards should require performance information to be presented: a simple set of indicators provides a quick “eye” on overall performance and allows Boards to determine where and when they wish more detailed reports. How many “dials” should the Board review? Somewhere in the neighborhood of 3-5 for each balanced measure. Just the process of identifying and developing the dashboard is a great Board development exercise.

3. Tie at least 50-75% of each agenda to the objectives from your strategic plan.

Most Board meetings are a fast paced run through of old / new business and the traditional boring report-outs from administrators. With a balanced measures approach you can simplify the time required for report-outs; with a consent agenda approach you can accept numerous self-evident update reports without wasting valuable Board time. That leaves more than half an agenda for one of the most important functions of governance: strategic thinking and planning. In today’s fast changing business environment, Boards struggle to assure enough strategic change to remain relevant and successful. Investing at least half of each meeting to strategy discussions enhances focus, performance, and responsiveness to strategic issues.

4. Conduct Board Development at each board meeting.

Board development is a constant challenge for most organizations. Limited budgets and free time make travel and conference participation for education a rare opportunity. One solution is to do a wee bit of development at each Board meeting. Reading and discussing an article on governance, scheduling product or service tutorials at each meeting, having a local person who is “seasoned” at governance provide a short tutorial on a chosen topic, asking your accountant to deliver a financial lesson (e.g. how to read a balance sheet), having a customer / client visit and provide their explanation of your product/service value are all brief time investments that will contribute to growth of governance capabilities.

5. Have a brief “product” or “service” tutorial at each board meeting.

A ten to fifteen minute brief update on one your organization’s products or services can provide a means for Board members to stay current and maintain a “feel” for the texture of their enterprise. This enhanced literacy is also accompanied by a chance to interact briefly with managers and program leaders as a means of evaluating the CEO’s management and leadership influence. These briefings (15 minutes should be sufficient) also qualify as board development investments.

6. Create “rules of engagement” for interaction and support with one another.

A seasoned Board is adept at decision making, interpersonal relationships, and dealing with difference of opinion and conflict. Unfortunately, most of us don’t serve with a full contingent of experienced governance members. Most groups, intending to behave more like teams, find it helpful to develop a set of rules of engagement that outlines commitments expected from each board member.

7. Have a job description and commitment to serve signed by each member.

Joining a Board is frequently fraught with uncertainty about the amount of time commitment required, conflict of interest guidelines, board development commitments, travel, representation, and other Board duties. Just like a job description helps focus an

employee's work, a Board job description not only helps focus the reality of the commitment but also scares away those who might consider joining the Board for the wrong reasons. Making the job description and conflict of interest statement a "commitment" that each new Board member signs helps raise the awareness of the governance commitments expected.

8. Conduct a board self-assessment at least once a year.

Progressive Boards engage in regular self-assessment. These can be as limited or far ranging as the Board feels is helpful and for which there is support capacity. Not wanting to conduct a large scale more cumbersome assessment is no excuse for not doing something each year. We know many Boards that evaluate the quality of meetings, agenda management, or perceptions of individual participation as more focused assessments annually. While a comprehensive assessment would cover all aspects of governance, Boards may be well advised to conduct one of these every several years while selecting some portions for focus on an annual basis.

9. Provide formal feedback to your CEO twice a year.

While CEO evaluation and goal setting is an annual function required in effective governance, many Boards fail to do this on a timely basis. Even when conducted effectively it is not enough: a formal mid year review should also occur that provides the CEO direct, formal feedback on how the Board sees performance. This bi-annual discussion keeps expectations and performance calibrated, assures CEOs have timely recognition of Board perceptions, and will result in better overall organizational and Board performance. For the Board and CEO who may not be fully in sync, quarterly discussions may be called for. While the once a year evaluation and goal setting will be time consuming, the mid-year feedback process will customarily require less time investment, assuming performance is on track. Customarily the executive committee leads the evaluation and review process; however, all Board members should be involved in the process.

10. Retreat at least once a year to revisit and reflect on organizational values and strategic plans.

The progressive Board finds time to "retreat" at least once a year, if only for a day, away from the pressures of a typical agenda. Discussion at these retreats allows relaxed exploration of changing business conditions, shifting customer expectations, chronic challenges, expansion, and a renewal of focus on strategy for the governance body. An annual strategic planning retreat is almost commonplace with many Boards. Certainly, some effort to refresh the strategic plan at least every three years is a minimum. In our experience the average retreat is somewhere around 1.5 days, it is not unheard of to only invest a day or to expand to 2.5 - 3 days for the Boards facing more complex challenges. Whatever your investment, make it something. Creating a calendar that selects the time a year in advance gives most Board members time to clear their calendar and make the commitment.

[Les Wallace, Ph.D.](#) is President, of Signature Resources Inc., an international leadership, strategy, and governance consulting firm headquartered in Colorado. Dr. Wallace works with about 10 boards a year.

The Washington Report

NOCA leaders gathered in Washington, DC on April 1 and met with policy makers to discuss issues important to the certification community. Meetings were held with senior policy staff at the

National Governors' Association, the National Conference of State Legislatures, the House Education and Labor Committee, the Senate Health, Education, Labor, and Pensions Committee, and the Senate Select Committee on Aging. Topics discussed included the reauthorization of the Workforce Investment Act (WIA) and the Senior Investment Protection Act.

The Workforce Investment Act reauthorization has made slow progress in the House, with the House Education and Labor Subcommittee on Higher Education holding a series of hearings to obtain feedback from WIA stakeholders about the reauthorization. NOCA submitted testimony to the Subcommittee sharing our views on the reauthorization; our testimony may be viewed on the [NOCA Web site](#). The Senate has yet to take up WIA as their primary focus is on health care reform.

Senator Herb Kohl (D-WI) reintroduced his bill to protect senior citizens from obtaining financial investment advice from persons holding themselves out as experts in senior investing. The Senior Investment Protection Act directs the Attorney General to establish a program of grants to states to investigate and prosecute misleading and fraudulent financial services marketing practices. Grants may also be used to develop educational materials and training aimed at reducing misleading and fraudulent marketing of financial products toward seniors. The legislation recommends that states adopt the North American Securities Administrators Association's (NASAA) Model Rule on the Use of Senior-Specific Certifications and Professional Designations for determining whether a designation being used is misleading. The NASAA model rule includes language recognizing NCCA program accreditation.

Senator Kohl, who chairs the Senate Select Committee on Aging, introduced this legislation in the last congress and NOCA supported it. Sen. Kohl asked for NOCA's support on the legislation before he reintroduced it this year.

NOCA's government relations team has been involved in a number of certification issues gathering steam at the state level. We recently weighed in on legislation in Texas to regulate the crane operator profession. Our recommendations included the inclusion of crane operator certifications from programs with NCCA accreditation or the equivalent as this is the accreditation standard accepted by most state that regulate crane operators. The bill was reported out of the Texas House Licensing and Administrative Procedures Committee with language recommending an ANSI-only accreditation. It has yet to be voted on by the full House; however, it is expected to move forward. NOCA have previously commented on similar proposals relating to crane operators in California as well as at the federal level.

NOCA was recently asked to comment on legislation in New Jersey to license fitness professionals. NOCA submitted comments recommending that only NCCA-accredited fitness programs be approved for recognized certifications.

Information about our activities in these areas is available on the NOCA website.

NCCA Report

Recent Accreditation Activity

The Commission completed its Spring meeting in March where they reviewed many new and renewal program applications. The number of applications continues to grow, and the Commissioners worked hard to carefully review each one, resulting in new accreditations for several certification programs. Congratulations to the following programs for successful accreditation of their programs. For a full list of NCCA accredited programs and renewal dates, please visit www.noca.org/ncca.

Newly Accredited Programs

[AAPTE](#) – Academy of Applied Personal Training Education

[BCPE](#) – Board of Certification for Professional Ergonomics

[CFRE](#) – Certified Fund Raising Executive International

[Board of Pharmaceutical Specialties](#)

[NCBTMB](#) – National Certification Board for Therapeutic Massage and Body Work

[NHA](#) – National Healthcareer Association

[NLN](#) – National League for Nursing

[TWCC](#) – Training and Wellness Certification Commission

Program Renewals

[NCBTMB](#) – National Certification Board for Therapeutic Massage and Body Work

Member News

NOCA Welcomes the Following New Members

- Training and Wellness Certification Commission
- Randall Rollinson
- Association of Strategic Alliance Professionals
- Elizabeth Price and Associates
- Professional Fitness Trainer Association
- National Personal Training Institute
- Forum for International Trade Training
- International Academy of Financial Management

Membership Benefit Highlight – NOCA Network

Are you taking advantage of all the discounts NOCA offers only to its members? As a NOCA member, you get discounts on products, publications and event registration all to help you do your job better. Members can save over \$400 a year when they participate in at least three of 12 webinars, one governance workshop, and attend the annual conference. Discounts also apply to publications produced throughout the year. Make sure you're getting the most from your NOCA membership and save on our events and resources to help your credentialing organization. Don't miss your chance to take advantage of this and other great NOCA member benefits.

Mickie Rops Receives Robert J. Painter Memorial Award

Mickie Rops, CAE, president of Mickie Rops Consulting Inc., has received the 2009 [Robert J. Painter Memorial Award](#) for her work on the American National Standard, *Standard Practice for Certificate Programs*. This award is presented by ASTM International to the person contributing the most outstanding service in the field of standards.

Sustaining Member in the Spotlight

Cobalt

Industry Standard technologies, uniquely focused solutions

Cobalt is a software development firm focused on providing the right technology solutions to the unique issues faced by credentialing organizations and certifications boards. Founded in 1996, Cobalt helps clients drive revenue, increase internal efficiency, and offer value-added services to their constituents through its CRM-based data management products. Cobalt products include association management, certification management, and accreditation management solutions that include seamless website integration, enterprise content management, and comprehensive business intelligence capabilities. Focus areas include systems integration, member portals and

self-service tools. Cobalt's solutions are built on the latest CRM technology – Microsoft Dynamics CRM 4.0.

Cobalt specializes in helping you build your certification program through stronger relationships and better service. This is achieved by providing the right tools - a centralized customer relationship management system to track all data, a web-portal for self-service and reports for real-time business intelligence. These tools simplify communications, improve efficiency and enhance customer service while providing a means to monitor and adapt to changing needs.

The most comprehensive certification management system on the market

The Cobalt Certification Management Suite (CCMS) is a full-featured Customer Relationship Management (CRM) system that provides secure, centralized information tracking and the tools to automate tasks and streamline workflow to alleviate much of the paperwork and manual processes involved in processing applications and renewals.

The Suite in Cobalt's Certification Management Suite refers to the integrated web portal. This portal provides program participants, program directors and others access to resources and online services including profile updates, exam applications, renewals, payments, status reports and much more.

Cobalt's Certification Management Suite is the foundation you need to build your credentialing program. The powerful combination of CRM and a personalized web portal gives you a complete view of all of your participants, and gives them the online self-service options they want. Complete marketing campaign and communications tools provide you what you need to promote your program, raise awareness, increase involvement and establish the value of your credential. Best of all, the online self service tools and built-in workflow automation engine frees you from the endless paperwork and manual data entry, allowing you to focus on growing and improving your credentialing program.

Features & Benefits

Cobalt's system will allow you to:

- View all information about an individual from one place
- Log notes, e-mails and other correspondence
- Automatically update status, eligibility and expiration dates based on your business rules
- Automate renewal notices and expirations
- Streamline the certification process with automated workflows and reminders
- Quickly send personalized bulk communications
- Batch print certificates
- Generate more revenue through the sale of add-on items
- Track customer service cases
- Create a knowledge base for your service representatives
- Automate data exchange with testing vendors
- Provide better, faster service
- Reduce customer service calls

Our Web Portal will save you money and reduce calls and manual data entry by allowing users to:

- Update their profile
- Apply for certification
- Purchase tests, study aids, certificates, verification letters and other items
- Make credit card payments
- Check status of applications and test scores
- Check renewal dates and amounts
- Log continuing education credits

- View statistical reports (program directors or state boards only)

Visit www.cobalt.net for more information or give us a call and let us show you how we can help you streamline your processes and free up more time to focus on growing your certification program!

Upcoming Events

NOCA Annual Educational Conference

Shine On: Exploring the Spectrum of Credentialing

November 18-21, 2009

Arizona Grand Resort

Phoenix, Arizona

This year's Annual Educational Conference, [Shine On: Exploring the Spectrum of Credentialing](#), is shaping up to provide more of the education, networking, and information that you need to keep your credentialing program up to date. Registration and a conference schedule will be available soon, so save the date!

This year's conference will feature 28 focused concurrent sessions, poster sessions, special interest groups, and two plenary sessions. You can also choose from six pre-conference workshops, allowing you to create your own customized educational experience. Speakers will include industry veterans and new faces in our expanding community. Additionally, you'll have numerous networking opportunities through a roundtable breakfast, special interest group sessions and great social events.

NOCA Academy Web Seminar Series

NOCA is pleased to provide the credentialing community with a [Web Seminar Academy Series](#) each year in subjects relevant to credentialing professionals. This year NOCA is offering 12 web seminars. Seminars cover a range of topics and present the chance for "hands-on" training to develop new skills and techniques for certification.

The first six seminars each contain information adapted from a popular session from NOCA's 2008 Annual Educational Conference. These encore presentations of the 2008 sessions are a great review for attendees or for colleagues who wish to share the information. [Please click here for more information.](#)

NOCA Governance Workshop: Building Great Governance

Mark O. Thorsby

Thursday, September 17, 2009

10:00 a.m. – 4:00 p.m.

Washington, D.C.

[Register today](#)

Building Great Governance, NOCA's highly-popular one-day workshop, will be offered for the second time this year in Washington, D.C., in September. The workshop is available for certification committee and staff members, and governing board members. *Building Great Governance* is an in-person event focusing on governance principles for a certification governing body or committee.

Attendees will learn what great governance is and how to create excellent governance teams. This workshop provides governing board or committee members ideas of what the vital success factors are for your board or committee, and ways to define your leadership style and characteristics.

Both new and experienced members and staff will benefit from this training session. Workshops include a continental breakfast and lunch. Attendees register on a first come, first serve basis, so be sure to register early! Because of our limited capacity, please wait for a confirmation email from NOCA to guarantee your registration is accepted. Discounted rates are available for members.

Planning your 2009 conference schedule?

See below for the dates of some of the industry's most relevant conferences.

Society for Human Resource Management

June 28 - July 1, 2009

New Orleans, LA

National Conference of State Legislatures

July 20-24, 2009

Philadelphia, PA

ASAE

August 15-18, 2009

Toronto, Canada

CLEAR

September 10-12, 2009

Denver, CO

Certification Networking Group

September 16, 2009

Washington, DC

Citizen Advocacy Center

"Nuts and Bolts of Effective Healthcare Oversight"

October 28-30, 2009

Orlando, FL

www.cacenter.org

NOCA

November 18 -21, 2009

Arizona Grand Resort

Phoenix, AZ

Certification Networking Group

December 16, 2009

Washington, DC