Dear Members,

The Institute for Credentialing Excellence (ICE) has been hard at work in 2013 expanding its role in the standards community, developing professional development products, and creating more channels for you to gain knowledge on best practices.

Notably in 2013, ICE introduced the newly branded 2013 ICE Exchange with a new format and fresh experience for our annual conference attendees. In an enhanced learning environment, attendees chose from a vast selection of educational sessions, attended the first-ever Learning Lounge – a high energy environment with bite-size learning – and stayed connected with a new mobile application. The event gathered more than 535 credentialing professionals in Amelia Island, Florida – the most in ICE history!

Here are just a few highlights from this year:

» **Standards Revision:** After nine years, ICE initiated the Standards Revision process in mid-2013. The Main Committee is chaired by Paul Grace and Lawrence Fabrey, with a total of eleven members. Three task groups have been formed to address standards related to administration/governance, psychometrics, and continuing competence. The timeline for completion of the final set of NCCA Standards is not fixed, but the groups are drafting and revising standards that have been shared with the Main Committee for input and subsequent revision. Next steps will include a public comment period, revision of draft standards as necessary, and final issuance, which is anticipated in second quarter of 2014.

» **Continued Competence Task Forces:** The five subgroups of the Task Force are making tremendous progress with a variety of work products in development. A facilitated Symposium is being planned for Q1 2014 with the emphasis of attracting a wide variety of stakeholders. The products being developed include:
  » Model framework for continuing competence program
  » Evaluation criteria tool to help organizations plan for a change to their program and/or evaluate their current program
  » An overview of the work of the Task Force was reported on at the 2013 ICE Exchange Closing Plenary.
  » **Education:** ICE is carving out a reputation as the provider of professional development opportunities for credentialing specialists and executives. The Governance Workshop drew a sell-out audience in June while the webinar series addressed a variety of topics from *Launching a Certification Program* to *Legal Considerations for Governance* to *Continued Competence*. In addition, the credentialing executive had numerous opportunities to network with and learn from each other.

Looking forward to the New Year, ICE is excited to once again offer a wide range of educational products and engage in new initiatives. Stay tuned to www.credentialingexcellence.org to learn the latest details on what’s ahead.

Thank you for your continued support throughout the year. We are so thankful for our members and the people we serve each and every day.

Sincerely,

B. Denise Roosendaal, CAE
Executive Director
Building the Value of Credentialing, Year After Year

With the dedication of volunteers, leaders, and members, the Institute for Credentialing Excellence (ICE) and its accreditation body, the National Commission for Certifying Agencies (NCCA), continues to support the credentialing community through education, standards, and research. This report highlights the accomplishments of ICE, the NCCA, and its members during the twelve months following November 2012.

Education

2013 ICE Exchange Recap

The newly branded 2013 ICE Exchange welcomed more than 535 industry professionals – more than ever before in ICE history. With a fresh educational format, ICE piloted a variety of new features throughout the event.

Soren Kaplan, founder of Innovation Point, kicked-off the conference with an intriguing keynote address about how it takes a solid understanding of industry trends, customer needs, and new possibilities to create innovative ideas. Kaplan’s inspiration left attendees with new insights and new ideas to implement into their day-to-day work.

ICE introduced our Learning Lounge – a dynamic, high energy environment where attendees gathered to engage in bite-size learning opportunities on varied industry topics. The colorful Learning Lounge fostered new opportunities for peer-to-peer learning in roundtable discussions, mini presentations by invited experts, ePoster gallery, and a genius bar. Throughout the event, attendees shared electronic “Aha! Moments” about trends impacting the credentialing industry. Submissions were entered for a chance to win a grand prize. The winning “Aha! Moment” was submitted by Michelle Porter from International Code Council and said: “We should be making public the work, effort, and money we’ve put into creating valid job task analysis – too much work to keep the results quiet!”

The official 2013 ICE Exchange Mobile App launched a short time before the event, and attendees were able to build their own schedule, network electronically with peers, access speaker handouts, and participate in ICE social media all in the palm of their hand. The ICE staff, volunteers, and industry partners were very happy with the success of the event and look forward to carrying this momentum into the year ahead.

ICE Academy: Credentialing Education Year-Round

The ICE Academy continued to offer relevant educational opportunities throughout 2013. A major success was the governance workshop held in Washington, DC. Glenn Tecker, Chairman & CEO of Tecker International LLC, facilitated this in-person, full-day, interactive workshop, examining the approaches to governance preferred by elected leaders and staff executives in the credentialing industry. This workshop equipped association staff and board members with the appropriate tools to make more confident decisions, sustain effective partnerships, and earn the support of their stakeholder communities.

ICE continued to offer the Certification 101 online modules, which have been applauded as a core onboarding tool for new employees. The modules have also been used to orient incoming board members to help them better understand the credentialing industry and certification as a whole. In addition, the Credentialing Marketing for Non-Marketing Professionals course continued to be a great resource for small organizations that do not have designated resources or budget for marketing. These permanent online educational offerings provide valuable, ongoing training to credentialing industry professionals, board members, and committee members.

The ICE Academy will add to its live webinar series and online courses in 2014, and introduce a new Executive Education series – CEO Connect. Stay tuned for details at www.credentialingexcellence.org/academy!
Standards Revision – Looking Forward to 2014!

The NCCA Standards Revision Project is well under way in its process of reviewing and revising the current NCCA accreditation standards. An update was provided at the 2013 ICE Exchange General Session on Tuesday, November 12. Once drafted and reviewed, the proposed new standards will be released with the opportunity for public comment, with subsequent revisions as necessary. It is anticipated that the new standards will be published in early to mid-2014, with a goal of implementation in 2015.

The National Commission for Certifying Agencies (NCCA):
More Efficient Than Ever with Its Online System!

The new online system for NCCA application, renewal, and annual reports launched this year and has been utilized for the January 31, April 30, and August 31 deadlines. The automated online system has allowed for a smooth application process with greater guidance and resources for applicants and efficient review for staff and Commissioners. As with all newly deployed software, there are always opportunities for additional features and changes, and ICE is continually reviewing and revising the process to improve efficiency.

Notifications are sent via an automated system which allows for documentation of all correspondence and communication regarding applications. A feature has been added so that organizations submitting multiple applications have the option to synchronize their forms so that duplicate information is automatically populated.

The NCCA has maintained its standing as the leader in providing accreditation services to personnel certification programs, having now accredited more than 280 certification programs from over 120 different organizations. The accreditation program continues to grow as more and more organizations seek third-party recognition of their programs.

ICE would like to thank the 2013 volunteer NCCA Commissioners for their tireless effort and commitment to the NCCA.

Assessment-based Certificate Accreditation Program (ACAP)

The launch of the new accreditation program, ACAP, has reached its one year anniversary! Within the year, 4 applications have been submitted for review. ICE currently offers several tools to help prepare certificate programs for accreditation. Resources include a self-assessment checklist, an instructional design guidance document, the ICE 1100 standards, and the application itself that includes guiding questions to help applicants understand the intent of the standards and types of evidence needed to demonstrate compliance. In 2014, ICE plans to provide additional education opportunities, including a three-part webinar series on instructional design principles to guide certificate program development.

Through the commitment and dedication of the NCCA, the following were achieved (as of October 2013):

<table>
<thead>
<tr>
<th>Category</th>
<th>Number</th>
<th>Note</th>
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</thead>
<tbody>
<tr>
<td>New applications reviewed</td>
<td>37</td>
<td>2013</td>
</tr>
<tr>
<td>Renewal applications reviewed</td>
<td>61</td>
<td>2013</td>
</tr>
<tr>
<td>Newly accredited programs</td>
<td>15</td>
<td>2013</td>
</tr>
<tr>
<td>Total accredited programs</td>
<td>282</td>
<td></td>
</tr>
<tr>
<td>Total organizations represented</td>
<td>122</td>
<td></td>
</tr>
<tr>
<td>Industry sectors represented</td>
<td>25</td>
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</table>
# Financial Report

## Statement of Activities and Changes in Net Assets

<table>
<thead>
<tr>
<th></th>
<th>December 31, 2012 and 2011</th>
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<th></th>
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<tr>
<td></td>
<td></td>
<td>2012 (Actual)</td>
<td>2011 (Actual)</td>
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<tr>
<td><strong>Revenue</strong></td>
<td></td>
<td>$1,441,574</td>
<td>$1,332,760</td>
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<tr>
<td>Membership Dues</td>
<td>$299,165</td>
<td>$300,205</td>
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<tr>
<td>Accreditation Services</td>
<td>534,565</td>
<td>470,576</td>
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<tr>
<td>Annual Conference</td>
<td>473,555</td>
<td>443,656</td>
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<tr>
<td>Education Events / Publications</td>
<td>47,611</td>
<td>91,064</td>
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<tr>
<td>Investment Income</td>
<td>37,498</td>
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<tr>
<td>Research Sponsorship</td>
<td>35,199</td>
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<tr>
<td>Miscellaneous</td>
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<td>12,550</td>
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<tr>
<td><strong>Total Revenue</strong></td>
<td></td>
<td>$1,441,574</td>
<td>$1,332,760</td>
</tr>
<tr>
<td><strong>Expenses</strong></td>
<td></td>
<td>$1,386,463</td>
<td>$1,201,378</td>
</tr>
<tr>
<td>Administrative</td>
<td>$500,818</td>
<td>$449,932</td>
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<tr>
<td>Accreditation Services</td>
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<tr>
<td>Annual Conference</td>
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<tr>
<td>Education Events / Publications</td>
<td>67,174</td>
<td>69,060</td>
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<tr>
<td>Marketing / Communications</td>
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<td>25,981</td>
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<tr>
<td>Research study</td>
<td>23,129</td>
<td>10,570</td>
<td></td>
</tr>
<tr>
<td><strong>Total Expenses</strong></td>
<td></td>
<td>$1,386,463</td>
<td>$1,201,378</td>
</tr>
<tr>
<td><strong>Change in Net Assets</strong></td>
<td>$55,111</td>
<td>131,380</td>
<td></td>
</tr>
<tr>
<td><strong>Net Assets at Beginning of Year</strong></td>
<td>828,423</td>
<td>697,043</td>
<td></td>
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<tr>
<td><strong>Net Assets at End of Year</strong></td>
<td>$883,534</td>
<td>$828,423</td>
<td></td>
</tr>
</tbody>
</table>
ICE Membership

ICE is comprised of the following members (as of December 31, 2013)

- **Sustaining Members**: 25
- **Organizational Members (Credentialing Bodies)**: 235
- **Accredited Organizational Members**: 122
- **Individual Members**: 14
- **Affiliate Members**: 12

ICE membership by state

- **Nigeria**: 1
- **Canada**:
  - AB: 1
  - BC: 1
  - ON: 30
ICE Board of Directors and NCCA Commissioners

2013 ICE Board of Directors

Chair
Denise Fandel, MBA, CAE
Executive Director, National Athletic Trainers Association
Board of Certification, Inc. (BOC)

Immediate-Past President
Cary List, CA, CFP
President and Chief Executive Officer, Financial Planning Standards Council

Chair-Elect
Linda Lysoby, MS, MCHES, CAE
Executive Director, National Commission for Health Education Credentialing

Secretary/Treasurer
Ronald G. Havlick

NCCA Chair
Donald A. Balasa, JD, MBA
Executive Director, Legal Counsel, American Association of Medical Assistants

Sustaining Member
Linda Waters, PhD
Vice President, Professional Associations, Prometric

Elected Board Members
Joan Campbell, CAE
Executive Director, American Board of Multiple Specialties in Podiatry

Claudia Zacharias, MBA, CAE
President and CEO, Board of Certification/Accreditation International

Public Member
Rebecca LeBuhn
Chair, Board of Directors, Citizen Advocacy Center

Ex Officio Member
Denise Roosendaal, CAE
Executive Director, Institute for Credentialing Excellence

2013 NCCA Commissioners

Chair
Donald A. Balasa, JD, MBA
American Association of Medical Assistants

Vice Chair
Chad Buckendahl, PhD
Alpine Testing Solutions, Inc.

Public Member
Mary F. Macomber, Esq., BA, JD

Elected Commissioners
Ron Kruzel, CST, MA
National Board of Surgical Technology and Surgical Assisting

Darlene Leuschke
Commission on Paraoptometric, Certification of the American Optometric Association

Todd Galati, MA
American Council on Exercise

ICE Board Appointee
Dania Eter, MBA
CISCO

NCCA Psychometric Appointees
Sandra Neustel, PhD
National Board of Examiners in Optometry

Timothy J. Muckle, PhD
National Board for Certification and Recertification of Nurse Anesthetists

Brian Bontempo, PhD
Mountain Measurement

General Counsel
Philip O’Neill, JD
Jacobson Holman, PLLC
## 2013 Committees and Task Forces

### Assessment-based Certificate Council

**Richard Cotton**  
American College of Sports Medicine  
**Tina Freilicher, PhD**  
Shoreline Psychometric Services, LLC  
**Joselito Lualhati, PhD**  
GSX Corporation  
**Michelle Nolin, CPLP**  
Training and Workplace Learning Strategist and Consultant  
**Rick Phillips**  
Badger Professional Consultancy  
**Eric Sanders**  
Organization Development Economist  
**Bobbi Losee Vernon**  
CFA Institute  
**Kory Ward-Cook, PhD, MT(ASCP), CAE**  
National Certification Commission for Acupuncture and Oriental Medicine

### Continuing Competence Taskforce

**Co-Chairs:**  
Cyndi Miller Murphy, RN, MSN, CAE  
Oncology Nursing Certification Corporation  
Christine Niero  
Professional Testing, Inc.

**Members:**  
Mary Ann Alexander  
The National Council of State Boards of Nursing  
Grady Barnhill, MA  
National Commission on Certification of Physician Assistants  
Graham Brent  
National Commission for the Certification of Crane Operators  
Christopher Butcher  
Heuristc Solutions  
Cedric Calhoun  
Recert Track  
Shannon Carter, CAE  
Competency and Credentialing Institute  
Michael Clark, CAE  
National Institute for Certification in Engineering Technologies  
Bette DiLeonardi, PhD  
National Board for Certification of Hospice and Palliative Nurses  
Cindy Durley, M.Ed., MBA  
Dental Assisting National Board, Inc.  
Cory Everett-Lozano  
Colorado Department of Regulatory Agencies  
Paul Grace, MS, CAE  
National Board for Certification in Occupational Therapy  
Sandra Greenberg, PhD  
Professional Examination Service  
Michael Hechter  
National Cancer Registrars Association  
Gwen Henderson  
American Registry for Diagnostic Medical Sonography  
Rebecca LeBuhn, MA  
Citizen Advocacy Center  
Felicia Lembesis, CAE  
Medical Dosimetrist Certification Board  
Cary List, CA, CFP  
Financial Planning Standards Council  
Katherine Miller, Ed.S.  
American Board for Certification in Homeland Security  
James Penrod  
Council of Landscape Architectural Registration Boards  
Diane Peratt, CAE  
National Court Reporters Association  
Karen Plaus, PhD, CRNA, FAAN  
National Board of Certification and Recertification for Nurse Anesthetists  
Jan Robinson  
College of Veterinarians of Ontario  
Robert Shaw, PhD  
National Board for Respiratory Care  
James Stobinski, PhD  
Competency and Credentialing Institute  
David Swankin  
Citizen Advocacy Center  
Roy Swift, PhD  
American National Standards Institute  
Michele Warholic, Esq., CAE  
Certified Financial Planner Board of Standards, Inc.  
Leanne Worsfold  
Icomp Consulting  
Joan Yudelson  
Financial Planning Standards Council
Education Committee

Chair:
Cynthia Allen
SeaCrest Consulting

Kay Bertrand
National Center for Competency Testing

Roger Brauer, PhD, PE
American Board for Occupational Health Nurses

Tiffany Carey Day
Human Resources Research Organization

Deborah Ford, PhD
CPS HR Consulting

Isabelle Gonthier, PhD
Financial Planning Standards Council

Ron Hanchar
Ascend Learning, LLC

Debra Hecker, RN, MBA, WCC, DWC
National Alliance of Wound Care

Ray Infante
Pilates Method Alliance

Vicki Moeller
Innovative Learning, LLC

Jason Schwartz
Pearson VUE

Kate Slagoski
Dental Assisting National Board, Inc.

Membership & Marketing Committee

Chair:
Jared Crabtree
Assessment Systems Worldwide

Vice Chair:
Anne Krolkowski, CAE
Certification Board of Infection Control and Epidemiology

Members:
Lori Barker
Healthcare Quality Certification Commission

Stephanie Dille, MBA
Pearson VUE

Vita Greco
Professional Examination Service

Jacquelyn K. Marshall, PhD
Board of Pharmacy Specialties

Virginia McFadden
Framing Success

Jack Schene
Prometric

Nominating Committee

Chair:
Cary List, CA, CFP
Financial Planning Standards Council

Members:
Cindy Durley, Med, MBA
Dental Assisting National Board, Inc.

Janice Moore, MA
SeaCrest Company

Timothy Muckle, PhD
National Board for Certification and Recertification of Nurse Anesthetists

Patricia Muenzen, MA
Professional Examination Service

Program Committee

Chair:
Shannon Carter, CAE
Competency and Credentialing Institute

Vice Chair:
Sara Blair Lake, JD, CAE
International Board of Lactation Consultant Examiners

Linda Anguish, SPHR, GPHR
Human Resource Certification Institute

Daniel Breidenbach, PhD
Applied Measurement Professionals

William Ellis, RPh, MS
Board of Pharmacy Specialties

Sandra Greenberg, PhD
Professional Examination Service

Donna Hayes
Alpine Testing Solutions

Mike Klug, JD
National Certification Commission for Acupuncture & Oriental Medicine

Sharon Lustig
Castle Worldwide, Inc.

Sherry Montgomery
American Board of Optometry

Cynthia Noe
American Association of Critical-Care Nurses

Jo Santos, RHIA
American Health Information Management Association

Nathan Thompson, PhD
Assessment Systems Worldwide

William West, MBA
Pearson VUE
Publications Committee

Chair: Johnna Gueorguieva, PhD
Dental Assisting National Board, Inc.

Members:
Julie Boyce
Pearson VUE
Carla Caro, MA
Professional Examination Service
Lois Davis, RN, MSN
Vascular Access Certification Corporation
Ame Enright
Child Life Council
Tracie Hickman, MA
Castle Worldwide, Inc.
Jeff Kelley, PhD
National Center for Competency Testing

Research & Development Committee

Chair: John Wickett, PhD
Financial Planning Standards Council

Vice Chair: Jerry B. Reid, PhD
American Registry of Radiologic Technologists

Members:
Linda Waters, PhD
Prometric
Torryn Brazell, CMP, CA
American Board of Audiology
Christopher M. Butcher,
Heuristic Solutions
Maggie Collins, MA
Human Resources Research Organization
Lawrence J. Fabrey, PhD
Applied Management Professionals
Chuck Friedman, PhD
Professional Examination Service
Cheryl Gross, MA, CAE
American Osteopathic Association
James Henderson, PhD
Castle Worldwide, Inc.
Pat Hughes
Counselor Training Approved Programs
Donna Merrit, MS
Measurement Incorporated
Cyndi Miller Murphy, MSN, RN, CAE
Oncology Nursing Certification Corporation
Patricia M. Muenzen, MA
Professional Examination Services
Karen L. Plaus, PhD, CRNA, FAAN
National Board of Certification and Recertification for Nurse Anesthetists
Andrew Spain, MA
Society for Simulation in Healthcare
Sue Steinkamp
Pearson VUE
James X. Stobinski, PhD, RN, CNOR
Competency and Credentialing Institute
Patricia Young, MA
Kryterion, Inc.

Research & Development fundraising Committee

Chair: Johnna Gueorguieva, PhD
Dental Assisting National Board, Inc.

Members:
Donna Hayes
Alpine Testing Solutions, Inc.
Tracy Lofty, MSA, CAE
Commission on Nurse Certification
Sue Steinkamp
Pearson VUE

NCCA Standards Revision Main Committee

Members:
Lynn D. Anderson, PhD
Joint Commission on Allied Health Personnel in Ophthalmology
Brian Bontempo, PhD
Mountain Measurement, Inc.
Catherine A. Carter
American Board for Certification in Orthotics, Prosthetics, and Pedorthics
Katherine Church
Certifying Board for Dietary Managers
Ida Darragh, CPM
North American Registry of Midwives
Lawrence J. Fabrey, PhD
Applied Measurement Professionals
Paul Grace, MS, CAE
National Board for Certification in Occupational Therapy
Leon Gross, PhD
Psychometric Consultant
Mary Macomber, BA, JD
South Florida Hunger Coalition
Liberty Munson
Microsoft Corporation
Melinda Rose
Global Skills Exchange Corporation
NCCA Standards Revision Committee Task Groups

Members:
- Don Balasa, JD, MBA
  American Association of Medical Assistants
- Brian Biagioli, EdD
  National Council on Strength and Fitness
- Graham Brent
  National Commission for the Certification of Crane Operators
- Roger Brauer, PhD, PE
  American Board for Occupational Health Nursing
- Toryn Brazell, MS, CAE
  American Board of Audiology
- Gay Bruhn, PhD, CPT
  International Society for Performance Improvement
- Christopher Butcher
  Heuristic Solutions
- Carla Caro, MA
  Professional Examination Service
- Margaret Collins
  Human Resources Research Organization
- William Cordes, CMA
  Institute of Certified Management Accountants
- Michelle DeLa Rosa
  ICF International
- Amy Dufrane, PhD
  Human Resource Certification Institute
- James Fidler, PhD
  American Medical Technologists
- Jeff Glassie
  Whiteford, Taylor & Preston
- Isabelle Gonthier, PhD
  Financial Planning Standards Council
- Johnna Gueorguieva, PhD
  Dental Assisting National Board, Inc.
- Judy Hale, PhD
  The Institute for Performance Improvement, L3C
- Ron Hanchar, MBA
  National Healthcareer Association
- Beryl Harman
  Think Strategic Consulting
- Lucinda Harman, RN, PhD
  American Chiropractic Neurology Board
- Jim Henderson, PhD
  Castle Worldwide
- Elisa Kahn, PhD
  Green Building Certification Institute
- Kevin Keller
  Certified Financial Planner Board of Standards
- Sherry Keramidas, PhD, FASAE, CAE
  Regulatory Affairs Certification Program
- Sara Blair Lake, JD, CAE
  International Board of Lactation Consultant Examiners
- Rebecca LeBuhn
  Citizen Advocacy Center
- Janice Moore, MA
  SeaCrest Company
- Paul Naylor, PhD
  Independent Consultant
- Mike Niederpruem, MS, MA, CAE
- Matthew O’Hara, CAE
  Registry of Interpreters for the Deaf
- Tom O’Neill, PhD
  American Board of Family Medicine
- Jim Penny, PhD
  Castle Worldwide
- Irene Perez
  Department of Defense
- Jerry Reid, PhD
  American Registry of Radiologic Technologists
- Linda Roquemore, BSN, RN CMQ/OE
  National Commission on Certification of Physician Assistants
- Adrienne Segundo
  National Board of Surgical Technology and Surgical Assisting
- William Schimmel
  Pharmacy Technician Certification Board
- Robert Shaw, PhD
  National Board for Respiratory Care
- Jim Stobinski, PhD
  Competency and Credentialing Institute
- Lori Tinkler
  National Board for Respiratory Care
- Gordon Waugh, PhD
  Human Resources Research Organization
- Dan Winder, PhD
  Course Outcomes
- Joan Yudelson
  Financial Planning Standards Council
Headquarters Staff

Executive Director
B. Denise Roosendaal, CAE

Operations and Administrative
Anjali Weber, Director
Jillian Boggs, Senior Associate
Tara Mohammed, Associate

Marketing and Creative Services
Kevin Hurley, Manager
Erica Lucca, Senior Associate

Event Services
Apryl Alexander, Manager
Andrea Kohanna, Associate

Sales Services
Jack Moulton, Associate

Education and Program Services
Anne Nevel, Manager
Moira Anderson, Associate

Financial Management and Accounting Services
Sunny Patel, Staff Accountant

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