



Institute for  
Credentialing  
Excellence™

## **2012-2013 Annual Report**

Providing Tools for Growth in Credentialing and Beyond

# Moving Forward and Ready to Grow

Dear Members,

**T**he 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](http://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 with 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/](http://www.credentialingexcellence.org/academy/)

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

**37**

New applications reviewed in 2013

**61**

Renewal applications reviewed in 2013

**15**

Newly accredited programs in 2013

**282**

Total accredited programs

**122**

Total organizations represented

**25**

Industry sectors represented

## 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.

# Financial Report

## Statement of Activities and Changes in Net Assets

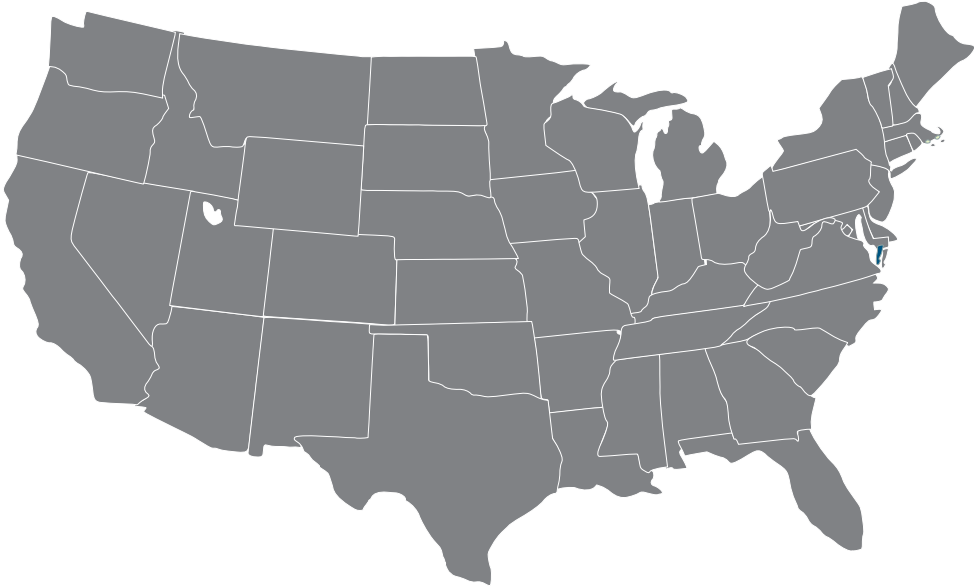
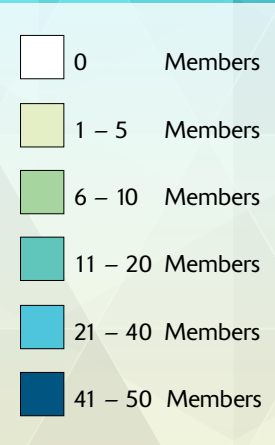
	December 31, 2012 and 2011	
	2012 (Actual)	2011 (Actual)
<b>Revenue</b>		
Membership Dues	\$299,165	\$300,205
Accreditation Services	534,565	470,576
Annual Conference	473,555	443,656
Education Events / Publications	47,611	91,064
Investment Income	37,498	3,508
Research Sponsorship	35,199	0
Miscellaneous	13,981	12,550
Total Revenue	\$1,441,574	\$1,332,760
<b>Expenses</b>		
Administrative	\$500,818	\$449,932
Accreditation Services	348,197	203,175
Annual Conference	412,434	442,660
Education Events / Publications	67,174	69,060
Marketing / Communications	34,711	25,981
Research study	23,129	10,570
Total Expenses	\$1,386,463	\$1,201,378
Change in Net Assets	\$55,111	131,380
Net Assets at Beginning of Year	828,423	697,043
Net Assets at End of Year	\$883,534	\$828,423

# ICE Membership

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



## 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  
*Heuristic 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 Warholc, 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:**

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*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:**

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*Financial Planning Standards Council*

### **Members:**

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*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:**

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*Competency and Credentialing Institute*

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*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:

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*Dental Assisting National Board, Inc.*

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Carla Caro, MA  
*Professional Examination Service*

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*Vascular Access Certification Corporation*

Ame Enright  
*Child Life Council*

Tracie Hickman, MA  
*Castle Worldwide, Inc.*

Jeff Kelley, PhD  
*National Center for Competency Testing*

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*Financial Planning Standards Council*

### Vice Chair:

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*American Registry of Radiologic Technologists*

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*Prometric*

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*American Board of Audiology*

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*Heuristic Solutions*

Maggie Collins, MA  
*Human Resources Research Organization*

Lawrence J. Fabrey, PhD  
*Applied Management Professionals*

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*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:

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*Dental Assisting National Board, Inc.*

### Members:

Donna Hayes  
*Alpine Testing Solutions, Inc.*

Tracy Lofty, MSA, CAE  
*Commission on Nurse Certification*

Tony Zara, PhD  
*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*

**Torryn 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  
Moirra Anderson, Associate

### **Financial Management and Accounting Services**

Sunny Patel, Staff Accountant



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