



2014-2015 Annual Report
Growing the Value of Credentialing

Charting a Path for Continued Growth and Opportunity

Every year I report with great pride what the Institute for Credentialing Excellence (ICE) has achieved. This year is no different. We again focused on several new professional development products to help credentialing professionals gain the knowledge necessary to help their organizations and programs succeed. We continue to grow and expand the ICE Community, reaching our highest membership count in ICE history, so that you will continue to use your professional colleagues as resources for growing your organization and supporting your professional growth. This year we have also reached beyond the traditional borders of our community to take the credentialing message to other stakeholders.

Here are just a few highlights from the year:

- » **Professional Development** 2015 saw another new professional development program come to life:
 - **Foundations of Assessment Based Certificate Programs** A four-module e-learning course that provides basic knowledge and good practices for developing and administering an assessment-based certificate program.
- Other ICE professional development offerings continue to grow:
- **CEO Connect Series** This series, aimed at the CEO and executive director, was built around the concept of offering strategic and forward-thinking content in formats that emphasize the importance of peer-to-peer learning and accommodate the busy lifestyles of executives. Embedded in this series were a variety of learning opportunities:
 - **Executive Summit** Held on June 2, 2015, with 50 participants.
 - **Business of Certification Workshop** Held on September 21, 2015, with 25 CEOs.
 - **CEO Connect Webinars** Six webinars were held throughout the year that focused on international expansion, effective metrics for certification organizations, building board teams, reaping the most benefits from insourcing and outsourcing, accessibility concerns, and protecting the brand of your credentialing and organization in the marketplace.
 - **Executive Conversations** Two conference call-style programs were held on topics including the hallmarks of good governance and certification's role in licensure alternatives. ICE will hold another executive conversation call in the last quarter of the year.
 - **Certificate Program for Credentialing Specialists** Released in November 2014, this program is an online, assessment-based, multi-modal, self-study course with an online community of resources and facilitated discussions. After two enrollment periods, the program attracted more than 150 certification professionals, exceeding initial estimates by over a hundred.
 - **Professional Development Webinar Series** This year saw the highest number of participants in ICE's history. Through the seven-session series, participants explored a variety of topics, including test security, improved job analysis, perspectives on credentialing from HR professionals, and working with licensing boards.

- » **Standards Revision** After nine years, ICE initiated the Standards Revision process in mid-2013. The Main Committee was chaired by Paul Grace and Lawrence Fabrey, with a total of 11 members. Three task groups finished their work to address standards related to administration/governance, psychometrics, and continuing competence. The draft standards were released for public comment in September 2014, adopted by the accredited programs in late November 2014, and will be implemented beginning January 1, 2016.
- » **ISO 17024 Program** After a successful pilot program in 2014, ICE has built its ISO 17024 accreditation offering through a partnership with the International Accreditation Services (IAS) that will allow certification programs already accredited by the NCCA to extend their accreditation to include ISO 17024. Of the three programs selected for the pilot program, two have been accredited to date.
- » **Continuing Competence Symposium and Framework Document** After two years of input from the Working Group and other credentialing leaders, this framework document was released in July 2015 to the ICE membership. The document should serve as a discussion guide for organizations that seek to enhance their continued competence programs.
- » **R&D Products Released** 2015 has been a busy year for the Research and Development Committee. To start the year, ICE released the latest version of its benchmarking survey report, *What Your CFO Wants to Know: Results of the 2014 Business of Certification Survey*. Following, ICE's Continuing Competence Task Force rounded out their three-year project by finalizing and releasing the member-exclusive report, *Utilizing a Process Framework to Build an Effective Continuing Competence Program for Certification*. Keeping with the momentum, *ICE's Digital Badge* report was released in late summer, and the highly anticipated *ICE Salary and Compensation Survey* is expected to be released before the end of the year.
- » **External Outreach** Through the newly re-formed Government Affairs Working Group, ICE has been able to extend its reach with the message of credentialing best practices to various government stakeholders. In September, I delivered testimony to the Economic Opportunities Subcommittee of the House Veterans Affairs Committee addressing the need for military personnel and veterans to have transportability of their military experience and training into the private sector. ICE also reached out to the ASAE audience with a presentation at the ASAE Annual Conference on the topic of *Business of Certification* report and a companion article in ASAE's online *Associations Now* publication. In addition, the chapter on credentialing (written by ICE) was published in the ASAE publication *Principles of Association Management* in January 2015.

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

Moving into 2016

ICE continues to look forward to the future and has many exciting plans for 2016. As the menu of membership benefits continues to grow, ICE is anticipating an uptick in total membership as well as greater participation within the staff of current ICE member organizations.

- **1 FREE Webinar!** As a thank you to our members for their continued support, ICE is again offering a free 2016 webinar (in the Professional Development Webinar Series) for members who renew their membership by February 28, 2016. Stay tuned for more details.
- **ISO 17024 Accreditation** ICE has moved into the establishment of the ISO 17024 accreditation process through a partnership with International Accreditation Services (IAS). For 2016, the online application will be adjusted to incorporate ISO 17024 particulars. ICE will also offer specific training on ISO 17024 compliance. The ISO 17024 component is an add-on option for NCCA accredited programs, as well as those seeking dual accreditation at the same time.
- **International Offerings** Through ICE's International Working Group, ICE will introduce several new product offerings in 2016 related to helping member organizations evaluate the risks and opportunities of expanding into the international marketplace—including a self-guided, online course.
- **Governance Workshops** ICE is developing two different approaches to governance training. The first is the restructured live Governance Workshop to be held in February 2016 that will focus on developing the relationship between the elected and staff leadership specifically applied to credentialing organizations. The second is the development of customizable governance workshops, held onsite at an organization's location to include the full governance body, to focus on organization-specific issues.
- **NCCA Application Process** The online application process has been updated in preparation for implementation of the newly adopted NCCA Standards for 2016. Any applications that were started but not submitted by August 31, 2015, have been transferred into the new application.
- **External Stakeholders** A new working group will focus on developing tools (possibly in the form of a toolkit) that ICE members need to articulate certification value to external stakeholder audiences. This group will examine the various audiences such as workforce development organizations, government and regulatory officials, third-party payers, and consumer and military/veterans groups.
- **Public Member Training** ICE is exploring proactive ways that it can support the Public Member. Possible products include a sample job description, online training, and development of a public member database.
- **R&D Products** While the process for creating superb research and development products is not a short one, you can expect many exciting works to be released in 2015 and 2016—such as a *Salary and Compensation Survey* (conducted by an external research firm for enhanced confidentiality) and many reports, including *Remote Proctoring*, *Standard Settings*, *Validation Strategies*, *Construction Definitions*, and *Value of Certification*.

As you can see, ICE is never idle. This vibrant community continues to expand and interact in new and exciting ways. Thank you for your continued support. We are looking forward to another remarkable year.

Did You Know?

As an organizational member, the number of individuals who can obtain member benefits with ICE is unlimited! All employees can create an individual member profile, receive member rates on educational programming and email updates, and network with the community. Contact ICE Headquarters, or have your identified ICE primary contact visit your organizational profile on www.credentialingexcellence.org to add individuals from your organization.

Revised NCCA Standards Launching in 2016!

On November 26, 2014, the latest revision of the Standards for the Accreditation of Certification Programs was adopted by the National Commission for Certifying Agencies (NCCA) following approval by majority vote of organizations with NCCA-accredited programs. Any application submitted after August 31, 2015, will be required to follow the new NCCA Standards.

ICE has developed a number of resources to assist currently accredited programs and new applicants with the transition to the new standards:

- The standards, along with the commentary, are published on the ICE website and available at no cost to members (there is a nominal charge for nonmembers).
- A high-level crosswalk document was created to highlight the major changes from the current NCCA Standards.
- A complimentary, on-demand training was recorded that outlines the application process, reviews each new standard, and provides guidance on the intent of the standard and its essential elements and the types of evidence needed to demonstrate compliance.

These resources can be found on the NCCA standards pages of the ICE website.

The National Commission for Certifying Agencies (NCCA)

The NCCA is continuously looking for new features to increase efficiency and clarity of the application process. With the implementation of the revised NCCA Standards, the online system for NCCA application, renewal, and annual reports that launched in 2013 will be updated to reflect the new Standards, as well as to include improvements to the online system that enhance user interfaces. Any applications started in 2015 that were not submitted will be automatically mapped to the new standards. Additionally, updates will be made to the annual report forms to simplify reporting.

The NCCA has maintained its standing as the leader in providing accreditation services to personnel certification programs, having now accredited more than 300 certification programs from over 120 different organizations. The accreditation program continues to grow as more organizations seek third-party recognition of their programs.

ICE would like to thank the 2015 volunteer NCCA Commissioners for their tireless effort and commitment to the NCCA.

Assessment-Based Certificate Accreditation Program (ACAP)

The launch of the ACAP accreditation program has reached its three-year anniversary! With three currently accredited programs, and growing interest and submissions in 2015, ICE has developed several tools to help prepare certificate programs for accreditation. The newest of these resources was released in 2015: *Foundations of ABC Programs*. This four-module e-learning course provides staff and volunteers with basic knowledge and good practices for developing and administering an assessment-based certificate program. It also provides templates and worksheets for evaluation and analysis of your program, and is aligned with practices required by the ICE 1100 Standards. Organizations with staff members who complete the course will receive a \$500 credit on an ACAP accreditation application!

Through the commitment and dedication of the NCCA, the following were achieved (as of September 2015):

39

New applications reviewed in 2015

46

Renewal applications reviewed in 2015

18

Newly accredited programs in 2015

312

Total accredited programs

25

Industry sectors represented

Financial Report

Statement of Activities and Changes in Net Assets

	2014 (Actual)	2013 (Actual)
Revenue		
Membership Dues	355,620	315,035
Accreditation Services	621,527	611,973
Annual Conference	563,632	541,448
Education Events/Publications	140,957	62,883
Investment Income	14,075	34,023
Research Sponsorship	53,572	46,749
Miscellaneous	18,171	13,590
Total Revenue	1,767,554	1,625,701
Expenses		
Administrative	616,945	595,439
Accreditation Services	401,340	415,726
Annual Conference	511,717	467,431
Education Events/Publications	184,324	77,006
Marketing/Communications	39,447	30,810
Research Study	34,953	17,184
Total Expenses	1,788,726	1,603,596
Change in Net Assets	(19,864)	22,105
Net Assets at Beginning of Year	905,639	883,534
Net Assets at End of Year	885,775	905,639

Lawsuit Update

As disclosed in the two previous Annual Reports, ICE has been defending a lawsuit filed by a program that had unsuccessfully applied for reaccreditation through NCCA. In June 2014, Judge Timothy Frawley in the Superior Court of Sacramento County, California, issued a decision upholding the NCCA's decision and the fairness of its administrative process. The complainant then filed a notice of appeal and requested that the trial court's judgment be stayed until the appeal process is concluded (similar to the stay granted by the trial court up to its June decision.) The appeals court denied that request and the program's accreditation was terminated effective August 29, 2014. In July 2015, the appeals court upheld the original ruling in favor of the NCCA decision and the enforcement of its policies. The financial implications of defending this lawsuit is not insignificant. Because of the way that the lawsuit was filed (no fraud, anti-trust claims, or damages claimed), the insurance policy traditionally held by ICE did not cover the legal expenses. The total amount of legal fees over the course of two-and-a-half years exceeds \$300,000.

ICE is comprised of the following members (as of September 2015)

223

Organizational Members (Credentialing Bodies)

129

Accredited Organizational Members

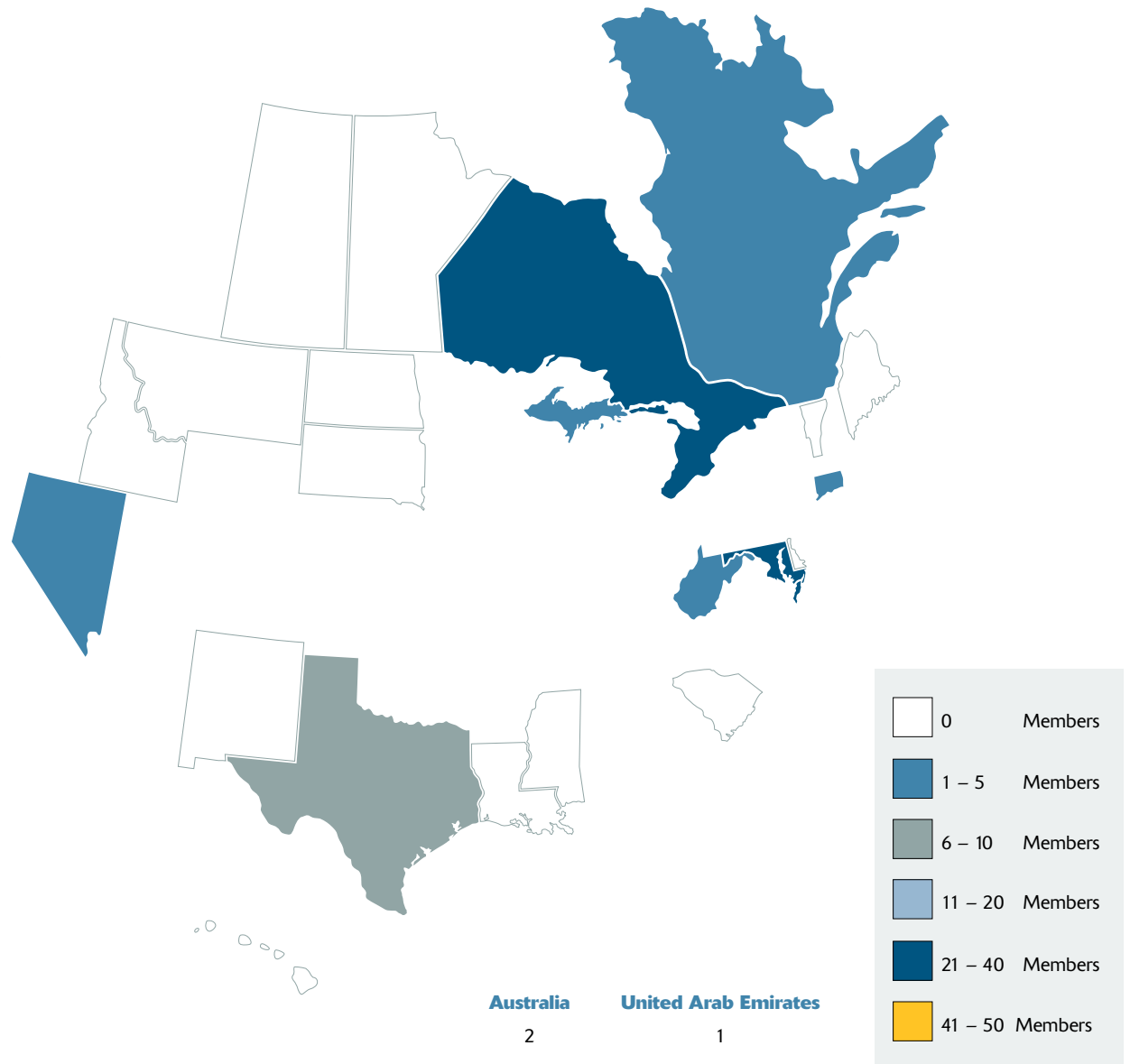
34

Sustaining/Affiliate Members

17

Individual Members

Organizational Membership





ICE Leadership

Board of Directors

Chair

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

Vice Chair

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

Secretary/Treasurer

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

NCCA Representative

Ronald Kruzel, CST, MA, CAE

Sustaining Member

Janice Moore
CEO
SeaCrest Company

Elected Board Members

Shannon Carter, CAE
CEO
Competency and Credentialing Institute

Johnna Gueorguieva, PhD
Senior Director, Credentialing and Client Services
Dental Assisting National Board, Inc.

Tracy Lofty, MSA, CAE
Executive Director
International Board of Heart Rhythm Examiners

Public Member

Rebecca LeBuhn
Chair, Board of Directors
Citizen Advocacy Center

Ex Officio Member

Denise Roosendaal, CAE
Executive Director
Institute for Credentialing Excellence

NCCA Commission

Chair

Chad Buckendahl, PhD

Vice Chair

Ronald Kruzel, CST, MA, CAE

Board Appointee

Dania Eter, MBA
Director, Global Certifications
CISCO Systems

Elected Commissioners

William Ellis, RPh, MS
Executive Director
Board of Pharmacy Specialties

Todd Galati, MA
Director of Credentialing
American Council on Exercise

Ronald Hanchar, MBA
Executive Director
National Healthcareer Association

Sara Blair Lake, JD, CAE
Executive Director
*International Board of Lactation
Consultant Examiners*

NCCA Appointees

Brian Bontempo, PhD
Founder & CEO
Mountain Measurement, Inc.

Amy Dufrane, PhD
Executive Director
Human Resource Certification Institute

Isabelle Gonthier, PhD
Director, Examinations
Financial Planning Standards Council

Amin Saiar, PhD
Senior Psychometrician
PSI Services LLC

Linda Waters, PhD
Vice President, Strategic Portfolio
Prometric

General Counsel

Philip O'Neill
Jacobsen Holman PLLC

Public Members

Mary F. Macomber, Esq., BA, JD
South Florida Hunger Coalition

Zerrin Sayar, MLA

Operational Committees

Assessment-Based Certification Accreditation Council (ACAC)

Chair

Bobbi Vernon
CPM Program Administrator
CFA Institute

ACAC Appointee

Sarah Carroll, PhD
Psychometrician
Castle Worldwide, Inc.

Members

Joselito Lualhati, PhD
Director, Strategy, Research and Development
Global Skills X-change (GSX)

Fae Mellichamp
Senior Psychometrician
Professional Testing, Inc.

Michelle Nolin, CPLP

Director

Informa Training Partners

Eric Sanders
Principal

Organization Development Economist

Kory Ward-Cook, PhD, CAE
*National Certification Commission for
Acupuncture and Oriental Medicine*

Education Committee

Chair

Rory McCorkle, PhD
PSI Services LLC

Vice Chair

Kate Slagoski
Dental Assisting National Board, Inc.

Members

Lauren Ero, MS, Med
American Medical Writers Association

Morgean Hirt
Association of Clinical Research Professionals

Lenora Knapp, PhD
Knapp & Associates International, Inc.

MaryBeth Kurland, CAE
Commission for Case Manager Certification

Mary Rehm
Exemplar Global

Sherrie Schulte, CAE
Irrigation Association

Anthony Zara, PhD
Pearson VUE

Government Affairs Working Group

Chair

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

Members

Carla Caro, MA
Professional Examination Service

Deanna Hudella
Pearson VUE

J. David M. Rozsa, CAE, ACA
Metacred, Inc.

Lisa Thiemann, PhD, CRNA
*National Board of Certification and
Recertification for Nurse Anesthetists*

Membership & Marketing Committee

Chair

Stephanie Dille, MBA
Pearson VUE

Members

Lance Blackstone
Questionmark

Sean Finn

Sarah Hinder
Prometric

Jacquelyn Kelly Marshall, PhD
Board of Pharmacy Specialties

Virginia McFadden
Framing Success

Carrie Tuck
Strasz Assessment Systems

Jennifer Witebsky
Association of Clinical Research Professionals

Jared N. Zurn, AIA, NCARB
*National Council of Architectural
Registration Boards*



Nominating Committee

Chair

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

Members

Lynn D. Anderson, PhD
Joint Commission on Allied Health Personnel in Ophthalmology

Chad Buckendahl, PhD

Cary List, CA, CFP

Financial Planning Standards Council

Christine Reidy, RD

Commission on Dietetic Registration

Program Committee

Chair

Linda K. Anguish, SPHR, GPHR
Human Resource Certification Institute

Members

April Cousins, CPA
American Chiropractic Neurology Board, Inc.

Vice Chair

Gayle G. Dahlman
Convention Industry Council

Deanna Hudella

Pearson VUE

Elisa Kahn, PhD

Oncology Nursing Certification Corporation

Felicia Lembesis, CAE

Medical Dosimetrist Certification Board

Sheila Mauldin, MNM

National Commission on Certification of Physician Assistants

Heather Rich

American Health Information Management Association

Michael J. Scott

Defense Security Service, Center for Development of Security Excellence

Michael Tamberino

Prometric

Evelyn Tessitore

Personal Touch Assessment

David Meissner

Kryterion, Inc.

Publications Committee

Chair

Jeff Kelley, PhD
Alpine Testing Solutions, Inc.

Carla Caro, MA

Professional Examination Service

Vice Chair

Lois Davis
Vascular Access Certification Corporation

Jacqueline Carpenito, MA

Professional Examination Service

Thomas Clark, RPh, MHS, CGP

Commission for Certification in Geriatric Pharmacy

Jared Crabtree

Assessment Systems

Trackie Hickman

Castle Worldwide, Inc.

Alex Kassidis

International Credentialing Associates

Joan Knapp, PhD

Knapp & Associates International, Inc.



Research & Development Committee

Chair

John Wickett, PhD
Wickett Measurement Systems

Vice Chair

Jerry B. Reid, PhD
American Registry of Radiologic Technologists

Members

Levi A. Boren, PhD
National Strength and Conditioning Association

Torryn Brazell, CMP, CA
American Board of Audiology

Christopher Butcher
Heuristic Solutions

Margaret M. Collins, MA

Andrew Dwyer, PhD
American Board of Pediatrics

Lawrence J. Fabrey, PhD
Applied Measurement Professionals

Michael Finger, PhD
Comira

Chuck Friedman, PhD
Professional Examination Service

Cheryl Gross, MA
*Accreditation Council for
Graduate Medical Education*

Pat Muenzen, MA
Professional Examination Service

Cynthia Miller Murphy, MSN, RN, CAE
Oncology Nursing Certification Corporation

Keith Morical
4ROI

Cynthia Noe, RN, MSN
*American Association of Critical-Care Nurses
Certification Corporation*

Angela Oler
American Industrial Hygiene Association

Karen Plaus, PhD, CRNA, FAAN, CAE
*National Board of Certification and
Recertification for Nurse Anesthetists*

William Schimmel
Pharmacy Technician Certification Board

Andrew Spain, MA
Society for Simulation in Healthcare

James Stobinski, PhD
Competency and Credentialing Institute

Daniel John Wilson
Mountain Measurement, Inc.

Patricia Young, MA
Kryterion, Inc.

Research & Development Fundraising Committee

Chair

Sara Blair Lake, JD, CAE
*International Board of Lactation Consultant
Examiners*

Members

Erica Brown
Alpine Testing Solutions, Inc.

Scott Hewlett
ProctorU



Task Forces

Ethics Statement Task Force

Chair

Michele M. Warholic, JD, CAE
Certified Financial Planner
Board of Standards, Inc.

Members

Claudia M. Carr
Global Skills X-Change (GSX)

Katherine Church, RDN
Certifying Board for Dietary Managers

William Cordes, CMA, CFM, CPA, CAE
Institute of Management Accountants

Boyd Crouse
Defense Security Service

David Jennette, CSA, LSA
National Surgical Assistant Association

Matthew O'Hara, CAE

ICE Digest Editorial Task Force

Chair

Cynthia Allen
SeaCrest Company

Members

Francine Butler, PhD, CAE, CMP
Empressa Consulting, Ltd.

Susan Davis Becker, PhD
Alpine Testing Solutions, Inc.

Lucinda Harman, RN, PhD
American Chiropractic Neurology Board, Inc.

International Task Force

Chair

Peter Holtmann
Exemplar Global Inc.

Members

Misty Bloom, JD
Behavior Analyst Certification Board, Inc.

Ulrich Chung, MCS, PhD
American Board of Industrial Hygiene

Larry Simmons, RN, PhD, CNE, NEA-BC
National League for Nursing

Jenna Webb
American Board of Multiple Specialties in Podiatry

Staff

Executive Director

B. Denise Roosendaal, CAE

Operations and Administrative

Anjali Weber, Director

Tara Mohammed, Senior Associate

Marketing and Creative Services

Kevin Hurley, Manager

Jayne Corso, Senior Associate

Event Services

Apryl Alexander, Senior Manager

Sydney Vranna, Manager

Cristina Adames, Associate

Sales Services

David Merli, Senior Manager

Education and Program Services

Joanna Truitt, Senior Manager

Moira Anderson, Senior Associate

Financial Management and Accounting Services

Madison Beam, Staff Accountant

Information Technology Services

Peter Smithson, Manager



2025 M Street NW, Suite 800
Washington, DC 20036 USA
202.367.1165 (ph)
202.367.2165 (fax)
info@credentialingexcellence.org
www.credentialingexcellence.org

VISIT US ON SOCIAL MEDIA

