Growing the Value of Credentialing

Institute for Credentialing Excellence

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.

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.

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 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):

<table>
<thead>
<tr>
<th>Category</th>
<th>Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>New applications reviewed</td>
<td>39</td>
</tr>
<tr>
<td>Renewal applications reviewed</td>
<td>46</td>
</tr>
<tr>
<td>Newly accredited programs</td>
<td>18</td>
</tr>
<tr>
<td>Total accredited programs</td>
<td>312</td>
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<td>Industry sectors represented</td>
<td>25</td>
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Financial Report

Statement of Activities and Changes in Net Assets

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<tr>
<th>Revenue</th>
<th>2014 (Actual)</th>
<th>2013 (Actual)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Membership Dues</td>
<td>355,620</td>
<td>315,035</td>
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<tr>
<td>Accreditation Services</td>
<td>621,527</td>
<td>611,973</td>
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<tr>
<td>Annual Conference</td>
<td>563,632</td>
<td>541,448</td>
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<tr>
<td>Education Events/Publications</td>
<td>140,957</td>
<td>62,883</td>
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<td>Investment Income</td>
<td>14,075</td>
<td>34,023</td>
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<td>Research Sponsorship</td>
<td>53,572</td>
<td>46,749</td>
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<tr>
<td>Miscellaneous</td>
<td>18,171</td>
<td>13,590</td>
</tr>
<tr>
<td><strong>Total Revenue</strong></td>
<td><strong>1,767,554</strong></td>
<td><strong>1,625,701</strong></td>
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<table>
<thead>
<tr>
<th>Expenses</th>
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<tr>
<td>Administrative</td>
<td>616,945</td>
<td>595,439</td>
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<tr>
<td>Accreditation Services</td>
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<td>415,726</td>
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<td>Annual Conference</td>
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<td>467,431</td>
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<td>Education Events/Publications</td>
<td>184,324</td>
<td>77,006</td>
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<td>Marketing/Communications</td>
<td>39,447</td>
<td>30,810</td>
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<tr>
<td>Research Study</td>
<td>34,953</td>
<td>17,184</td>
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<tr>
<td><strong>Total Expenses</strong></td>
<td><strong>1,788,726</strong></td>
<td><strong>1,603,596</strong></td>
</tr>
</tbody>
</table>

| 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 Memberships are distributed across various regions, with notable counts for Australia (2) and the United Arab Emirates (1). The map visually represents the geographical distribution of members, with various shades indicating the number of members per region.
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