



Institute for
Credentialing
Excellence™

2011-2012 Annual Report

Providing the Tools for Growth in Credentialing and Beyond



Moving Forward and Ready to Grow

Dear Members,

This has been quite a busy and productive year. Over the past twelve months, we have made tremendous progress on key initiatives, strengthened our core offerings and developed a solid foundation for growth into the future. ICE has continued to provide best practices and resources for credentialing organizations and their employees to enhance the quality of their programs.

The ICE Board of Directors undertook the next evolutionary step towards its application of the Policy Governancet[™] concepts which will greatly enhance the organization's ability to focus on its strategic leadership and deliver effectively on its plan.

ICE has also re-established connections with other like-minded organizations such as ANSI, CLEAR, and ATP. We appreciate their support of the credentialing community and continue to develop collaborative approaches to our mutual goals.

Here are just a few highlights from this year:

» **NCCA Online Application Solution** – ICE worked throughout the year on the development of the NCCA Online Application solution. Along with Heuristic Solutions, the NCCA commission and staff developed a system that will greatly enhance your experience when submitting your renewal or new program application. Our anticipated release date is November 1, 2012.

- » **New Website** – This new platform allows for added functionality and a more user-friendly interface. This new website features many online networking capabilities including an individual profile for each member.
- » **Director of Accreditation Services** – We welcomed Anjali Weber to the ICE Team. She brings a wealth of experience in credentialing and stands ready to assist with member accreditation questions. The addition of this newly created position gives NCCA the necessary support to help the NCCA deliver on its mandate, and to provide your organizations with enhanced customer service and support.
- » **Research** – The Value of Certification Toolkit was released in April 2012, plus three more products will be released by the end of 2012. ICE also launched a new fundraising program to highlight the importance of the R&D function at ICE.
- » **ACAP Re-launch** – Assessment based Certificate Accreditation Program was refined and re-launched after its 2011 pilot program. It is now well positioned for growth.

With a strong foundation in place, ICE is looking forward to 2013 and is progressing on several exciting new initiatives including expanding professional development products, further developing ICE's role in the standards community, and creating more ways for you to gain knowledge on best practices.

Sincerely,



Cary List, CA, CFP®
ICE President 2012



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, research and advocacy. This report highlights the accomplishments of ICE, the NCCA, and its members during the twelve months following November 2011.

Education

2011 Annual Educational Conference

ICE hosted another successful conference with ICE 2011: Pathways to Growth. The conference opened with dynamic keynote speaker David Stillman who gave an eye-opening address about tailoring customer service to each generation. Mr. Stillman's engaging presentation gave ICE attendees a new outlook on how to capitalize emotional connections and generational differences to make every customer experience a positive one.

The 2011 conference offered a variety of educational opportunities – from pre-conference workshops to concurrent sessions to special interest groups. In addition, there were two special NCCA sessions: one was geared towards those individuals thinking about pursuing accreditation and the other was for those with an accredited program highlighting best practices for submitting annual reports and renewal applications. These sessions, combined with networking events and peer-to-peer discussion groups, made the conference a valuable experience for the nearly 500 credentialing industry professionals in attendance.

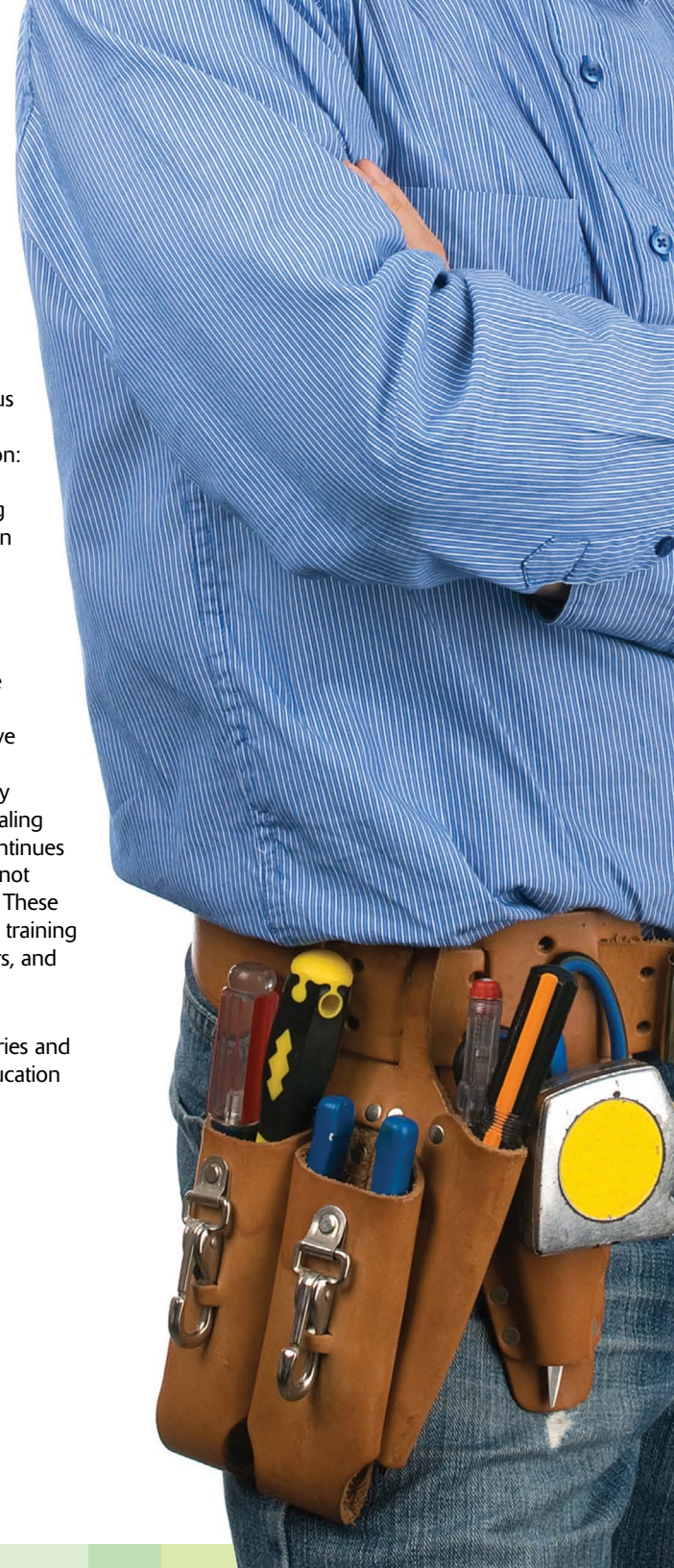
Finally, ICE closed the conference with its first ever Research Summit. This interactive session informed attendees about current research projects, as well as covered the latest research trends and benchmarking statistics in the credentialing industry. Attendees benefited from this collaborative environment and were provided with the latest research to take back to their companies.

ICE Academy: Credentialing Education All Year Long

The ICE Academy continued to offer relevant educational opportunities throughout 2012 with a focus on an array of topics within the credentialing industry. One of the biggest successes was "NCCA Accreditation: Demystifying the Application Process and Standards," which reviews the overall application process including eligibility, how to prepare the application, and common mistakes and pitfalls. This webinar is being offered indefinitely as a tool to help those applying for NCCA accreditation.

ICE also 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. Additionally, the Credentialing Marketing for Non-Marketing Professionals course continues to be a great resource for small organizations that do not have a designated resource or budget for marketing. These online educational offerings provide valuable ongoing training to credentialing industry professionals, board members, and committee members.

The ICE Academy will continue to offer its webinar series and online courses in 2013, as well as a new Executive Education series. Stay tuned for details at www.credentialingexcellence.org/ICEacademy!



Through the commitment and dedication of the NCCA, the following statistics were achieved (as of October 2012):

28

New applications reviewed in 2012

45

Renewal applications reviewed in 2012

14

Newly accredited programs in 2012

276

Total accredited programs

127

Total organizations represented

23

Industry sectors represented

Standards and Accreditation

In December 2011, ICE welcomed Anjali Weber to the team as Director of Accreditation Services. A biomedical engineer by training, Anjali's experience with certification program development, as well as database and website implementation brings the skills necessary to analyze and update existing processes for greater efficiency, communication, and member engagement.

ICE 1100 – Standard for Assessment Based Certificate Programs

Thanks to the tireless efforts of the Assessment-based Certificate Accreditation Council (ACAC), ICE officially launched the Assessment-Based Certificate Accreditation Program (ACAP) based on the requirements of the ICE 1100 Standard. This Standard was first published in 2009 as the first American National Standard for these kinds of certificate programs. After completing a pilot application process, ICE implemented its first application deadline of November 15, 2012 and provides a number of resources to prepare for program accreditation. Please visit us online at www.credentialingexcellence.org/ACAP for more information.

The National Commission for Certifying Agencies (NCCA) is Now Online!

After extensive evaluation, ICE chose Heuristic Solutions as its partner for the development of the NCCA online application software. This new system streamlines the process of NCCA application, renewal, and annual reports, allowing applicants to upload documents in a systematic (paperless) approach, which will improve the efficiency of the review process and response time to applicants. The online application is fully implemented for the January 31, 2013 NCCA application deadline.

The NCCA has maintained its standing as the leader in providing accreditation services to personnel certification programs, having now accredited more than 270 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 2012 volunteer NCCA Commissioners for their tireless effort and commitment to the NCCA.

Research and Publications

The 2012 ICE Research Agenda primarily focused on three projects: recertification and continuing competence, best practices in certification program management, and determining eligibility criteria. In addition, the Research and Development Committee also completed data collection and analysis on several research projects that began in 2011 and issued several new products. Below is a summary of the Committee's work.

Value of Certification Toolkit

In May of 2012, ICE released the Value of Certification Toolkit. A result of several years of hard work by ICE's Research and Development Committee, the toolkit features seven ready-to-use research surveys that help certification program leaders target different stakeholders groups to assess the value of their programs as perceived by those groups. Organizations who purchase the toolkit receive their own raw data, and the Research and Development Committee will continue to monitor and analyze the data across all organizations.

Determining Eligibility Criteria

What methods should organizations follow in developing eligibility criteria? What is best practice about changing them? In 2012 the Eligibility Criteria Task Force designed a research study involving interviews and completed a pilot test of its interview protocol. Data collection will begin in 2012 and continue into 2013 with the publication of a final report of the research results.

Management Best Practices

The Management Practices Task Force designed a study to identify the management practices of effective certification programs. It is using an interview method to gather data from credentialing program managers to determine the most effective practices for managing a certification program. The study has been designed and data collection is underway. A final report is expected in 2013.

Recertification: Methods for Ensuring Continuing Competence

Based on research begun in 2011, this Task Force researched and completed a white paper that details the definitions of competence and continued competence, methods for measuring continued competence, and considerations when designing and implementing a continued competence program. The final paper is expected to be published in late 2012.

Research into Codes of Ethics

In early 2011, the Research and Development Committee convened a Task Force on Ethics to review the ethics processes and documentation for certification programs. The Task Force conducted a survey in late 2011 and collected general information about participating organizations, along with specific questions about the organizations' ethics program. Data analysis was completed in 2012 and the final report is expected for publication in November 2012.

The Business of Certification: What Your CFO Needs to Know

In 2011 and into 2012, ICE surveyed member organizations to gather data on the business side of operating a certification organization. ICE's ultimate goal in conducting this line of research was to produce financial metrics that can serve as a reference for certification organizations. The report resulting from this data will be an extremely useful tool for members to use as a benchmark to evaluate their own programs. The final report will be ready for publication in November 2012.



NCCA Application Goes Online!

The ICE Board of Directors allocated funds for the development of an online application system. With the assistance of Heuristic Solutions, NCCA Commission, and staff, the system has been developed and is going live in November.

The system was designed to accomplish several goals:

- » Enhance and ease the application process
- » Create efficiencies for the Commissioners
- » Improve response times
- » Reduce and/or eliminate the volume of paper per application

This online application system features

- » Step-by-step guidance for compliance with the NCCA Standards
- » Color-coded system conventions and tools to inform applicant of next steps
- » Intuitive approach to anticipate application's questions
- » Single Sign-on through the ICE website
- » File Library hosting for documents
- » E-signature capabilities
- » Online payment processing
- » Automated email notifications throughout the process

For currently accredited programs, the system will:

- » Provide notifications of upcoming deadlines
- » Allow electronic filing of Annual Reports



Financial Report

Statement of Activities and Changes in Net Assets

For the Year Ended December 31

	2010 (Actual)	2011 (Actual)*
Revenue		
Membership Dues	\$298,381	\$300,205
Accreditation Services	460,480	481,684
Annual Conference	420,741	443,656
Education Events / Publications	96,224	99,922
Investment Income	27,345	3,508
Research Sponsorship	18,500	0
Miscellaneous	22,559	16,109
Total Revenues	\$1,344,230	\$1,345,084
Expenses		
Administrative	\$385,913	\$452,436
Accreditation Services	213,772	208,397
Annual Conference	417,408	442,660
Education Events / Publications	94,413	68,985
Marketing / Communications	14,133	25,981
Research study	24,214	10,570
Total Expenses	\$1,149,853	\$1,209,029
Increase in Net Assets	194,377	136,055
Net Assets at Beginning of Year	502,666	506,178
Net Assets at End of Year	\$697,043	\$502,666

**Unaudited*

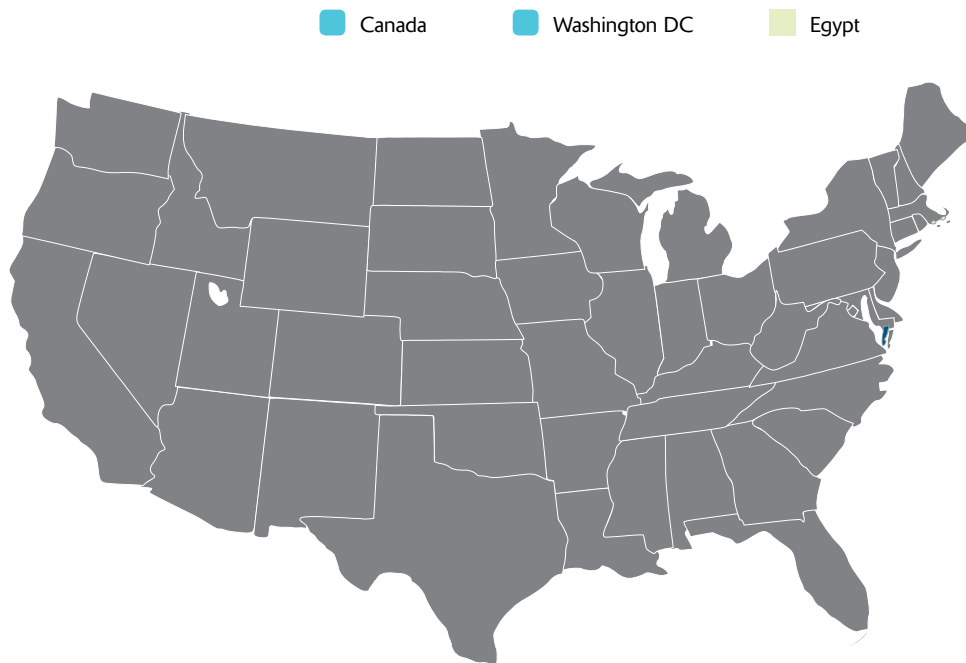
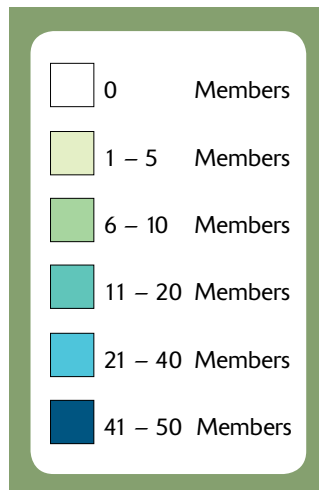
ICE Membership

ICE is comprised of the following members *(as of November 1, 2012)*



**Organizational members represent more than 150 occupations*

ICE membership by state



ICE Board of Directors and NCCA Commissioners

2012 ICE Board of Directors

President

Cary List, CFP, CA
Financial Planning Standards Council

President-Elect

Denise Fandel, MBA, CAE
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Operating Engineers Certification Program

NCCA Chair

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

Sustaining Member

Linda Waters, PhD
Prometric

Elected Board Members

Joan Campbell, CAE
American Board of Multiple Specialties in Podiatry

Jan Wyatt, PhD, RN, NP-C
Pediatric Nursing Certification Board, Inc.

Appointed Board Member

Paul Grace, MS, CAE
National Board for Certification in Occupational Therapy

Public Member

Rebecca Lebuhn
Citizen Advocacy Center

2012 NCCA Commissioners

Chair

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

Co-Chair

Chad Buckendahl, PhD
Alpine Testing Solutions, Inc.

Public Member

Mary F. Macomber, Esq., BA, JD

Elected Commissioners

Michael Breining, JD
Breining Institute

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

Darlene Leuschke
Commission on Paraoptometric Certification of the American Optometric Association

ICE Board Appointee

Dania Eter, MBA

NCCA Appointee

Ida Darragh, CPM
North American Registry of Midwives

NCCA Psychometric Appointees

Sandra Neustel, PhD
National Board of Examiners in Optometry

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

Brian Bontempo, PhD
Mountain Measurement

General Counsel

Philip O'Neill, JD
Jacobsen Holman PLLC



2012 Committees and Task Forces

Assessment-Based Certificate Accreditation Program

Richard Cotton, MA
American College of Sports Medicine

Michelle Nolin Flewell, CPLP
Informa Training Partners

Tina Freilicher, PhD
Shoreline Psychometric Services, LLC

Lenora Knapp, PhD
Knapp & Associates International, Inc.

Rebecca LeBuhn, MA
Citizen Advocacy Center

Joselito Lualhati, PhD
Global Skills Exchange

Rick Phillips, PhD
Castle Worldwide, Inc.

Eric Sanders, MA, MBA, CPLP
Organization Development Economist

Bobbi Vernon
CFA Institute

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

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Board of Certification/Accreditation International

Board Liaison:
Cary List, CA, CFP
Financial Planning Standards Council

Members:
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The American Board for Certification in Homeland Security

Vita Greco
PES

Michael Hecter
National Cancer Registrars Association

Deanna Hudella
Pearson VUE

Anne Krolkowski, CAE
Certification Board of Infection Control & Epidemiology

Virginia McFadden
Framing Success

Sherry Montgomery
American Board of Optometry

Nominating Committee

Paul Grace, MS, CAE
National Board for Certification in Occupational Therapy

Johnna Gueorguieva, PhD
Dental Assisting National Board

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

Janice Moore, MA
SeaCrest Company

Patricia Muenzen, PhD
PES

Program Committee

Chair:
Linda Lysoby, MS, MCHES, CAE
National Commission for Health Education Credentialing

Vice-Chair:
Shannon Carter, CAE
Competency and Credentialing Institute

Board Liaison:
Joan Campbell, CAE
American Board of Multiple Specialties in Podiatry

Members:
Ame Enright
Child Life Council

Sherry Keramidas, PhD, FASAE, CAE

Trish McConkey
American Registry for Diagnostic Medical Sonography

Annette M. Parry Bush, RN BSN MBA OCN
Oncology Nursing Certification Corporation

Adrienne Segundo, IOM
National Board of Surgical Technology and Surgical Assisting

Lisa Trofe
Commission for Case Manager Certification

William Ellis, RPh, MS
Board of Pharmacy Specialties

Mike Klug
National Certification Commission for Acupuncture & Oriental Medicine

Jo Santos, RHIA
American Health Information Management Association

Bill West, MBA
Pearson VUE

Publications Committee

Chair:

Johnna Gueorguieva, PhD
Dental Assisting National Board

Board Liaison

Jan Wyatt, PhD, RN, NP-C
Pediatric Nursing Certification Board, Inc.

Members:

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PSI Services, LLC

Lois Davis, RN, MSN
Association for Vascular Access

Mary Gevorkian, PhD
PSI Services, LLC

Dennis McLeavy, CFA, DBA
CFA Institute

Jennifer Reed
Applied Measurement Professionals

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Vice Chair:

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Christopher Butcher, PhD
Heuristic Solutions

Larry Fabrey, PhD
AMP

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Linda Waters, PhD
Prometric

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Chuck Friedman, PhD
Association of Social Work Boards

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American Osteopathic Association

Bob Mahlman, MA
*The Ohio State University, Center on
Education and Training for Employment*

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

Patricia M. Muenzen
Professional Examination Services

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

Jerry Reid, PhD
*American Registry of Radiologic
Technologists*

James X Stobinski, PhD, RN, CNOR
Competency and Credentialing Institute

Patricia Young, MA
Kryterion, Inc.

ICE 1100 – Standard for Assessment-Based Certificate Programs Main Committee

Chair:

Lenora Knapp, PhD
Knapp and Associates International

Vice-Chair:

Shannon Carter
Competency and Credentialing Institute

Members:

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Training Education Management LLC

Judith Hale, PhD
Hale Associates

Beryl Harman

Jim Henderson, PhD
Castle Worldwide

Julianna Kazragys
*Healthcare Information and Management
Systems Society*

Charles Keil,
Federal Government

Jim Lewis,
NSF International

Joselito Lualhati, PhD
Global Skills Exchange Corp

Greg Melia, CAE
ASAE

Janice Moore
SeaCrest Company

Liberty Munson
Microsoft Corporation

Ayana Nickerson
National League for Nursing

Dwayne Norris, PhD
American Institutes for Research

John Weiner, PhD
PSI Services, LLC

Walt Woerheide, PhD, CFP®
The American College

Headquarters Staff

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B. Denise Roosendaal, CAE

Operations and Administrative

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Elizabeth Grater, Manager

Becky Morgan, Coordinator

Jillian Ahrens, Associate

Marketing and Creative Services

Amanda Wood, Director

Andrew Younger, Manager

Erica Lucca, Associate

Event Services

Apryl Alexander, Manager

Emily Grochowski, Associate

Pam Cleffi, Associate

Sales Services

Alex Aaron, Coordinator

Education and Program Services

Anne Nevel, Manager

David Park, Associate

Financial Management and Accounting Services

Robert Geist, Staff Accountant



2025 M Street, N.W.

Suite 800

Washington, D.C. 20036

202.367.1165 (ph)

202.367.2165 (fax)

info@credentialingexcellence.org

www.credentialingexcellence.org