2011-2012 Annual Report
Providing the Tools for Growth in Credentialing and Beyond

Institute for Credentialing Excellence™
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 Governance® 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

Moving Forward and Ready to Grow
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!
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.

<table>
<thead>
<tr>
<th>Through the commitment and dedication of the NCCA, the following statistics were achieved (as of October 2012):</th>
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<tbody>
<tr>
<td><strong>28</strong> New applications reviewed in 2012</td>
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<tr>
<td><strong>45</strong> Renewal applications reviewed in 2012</td>
</tr>
<tr>
<td><strong>14</strong> Newly accredited programs in 2012</td>
</tr>
<tr>
<td><strong>276</strong> Total accredited programs</td>
</tr>
<tr>
<td><strong>127</strong> Total organizations represented</td>
</tr>
<tr>
<td><strong>23</strong> Industry sectors represented</td>
</tr>
</tbody>
</table>
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

<table>
<thead>
<tr>
<th></th>
<th>2010 (Actual)</th>
<th>2011 (Actual)*</th>
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</thead>
<tbody>
<tr>
<td><strong>Revenue</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Membership Dues</td>
<td>$298,381</td>
<td>$300,205</td>
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<tr>
<td>Accreditation Services</td>
<td>460,480</td>
<td>481,684</td>
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<td>Annual Conference</td>
<td>420,741</td>
<td>443,656</td>
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<tr>
<td>Education Events / Publications</td>
<td>96,224</td>
<td>99,922</td>
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<td>Investment Income</td>
<td>27,345</td>
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<td>Research Sponsorship</td>
<td>18,500</td>
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<td>Miscellaneous</td>
<td>22,559</td>
<td>16,109</td>
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<tr>
<td><strong>Total Revenues</strong></td>
<td>$1,344,230</td>
<td>$1,345,084</td>
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<table>
<thead>
<tr>
<th></th>
<th>2010 (Actual)</th>
<th>2011 (Actual)*</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Expenses</strong></td>
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<tr>
<td>Administrative</td>
<td>$385,913</td>
<td>$452,436</td>
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<tr>
<td>Accreditation Services</td>
<td>213,772</td>
<td>208,397</td>
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<tr>
<td>Annual Conference</td>
<td>417,408</td>
<td>442,660</td>
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<tr>
<td>Education Events / Publications</td>
<td>94,413</td>
<td>68,985</td>
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<tr>
<td>Marketing / Communications</td>
<td>14,133</td>
<td>25,981</td>
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<tr>
<td>Research study</td>
<td>24,214</td>
<td>10,570</td>
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<tr>
<td><strong>Total Expenses</strong></td>
<td>$1,149,853</td>
<td>$1,209,029</td>
</tr>
</tbody>
</table>

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)

- **Sustaining Members**: 23
- **Organizational Members (Credentialing Bodies)**: 329
- **Individual Members**: 19
- **Affiliate Members**: 11

*Organizational members represent more than 150 occupations*

ICE membership by state

- **Canada**: [Map representation]
- **Washington DC**: [Map representation]
- **Egypt**: [Map representation]
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
National Athletic Trainers Association Board of Certification, Inc.

(BOC)

Secretary/Treasurer
Ronald G. Havlik,
Operating Engineers Certification Program

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

Sustaining Member
Linda Waters, PhD
Prometric

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

Electra 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

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
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

Marketing and Membership Committee
Chair:
Claudia Zacharias, MBA, CAE
Board of Certification/Accreditation International
Board Liaison:
Cary List, CA, CFP
Financial Planning Standards Council
Members:
Jarod Crabtree, MA
The American Board for Certification in Homeland Security
Vita Greco
PES
Michael Hecter
National Cancer Registrars Association
Deanna Hudella
Pearson VUE
Anne Krolowski, 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:**
Roberta Chinn, PhD
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

Research and Development Committee

**Chair:**
James Henderson, PhD
Castle Worldwide

**Vice Chair:**
John Wickett, PhD
Financial Planning Standards Council
Christopher Butcher, PhD
Heuristic Solutions
Larry Fabrey, PhD
AMP

**Board Liaison:**
Linda Waters, PhD
Prometric

**Members:**
Chuck Friedman, PhD
Association of Social Work Boards
Cheryl Gross, MA, CAE
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:**
Cynthia Durley, MEd, MBA
Dental Assisting National Board
Donald Ford, PhD, CPT,
Training Education Management LLC
Judith Hale, PhD
Hale Associates
Beryl Harman
Jim Henderson, PhD
Castle Worldwide
Juliana 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

Executive Director
B. Denise Roosendaal, CAE

Operations and Administrative
Anjali Weber, Director
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

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