Institute for Credentialing Excellence - Future Directions in Credentialing Summit Major Outcomes

Friday June 8, 2018

Introduction

On May 7, 2018, in Washington DC, the Institute for Credentialing Excellence (ICE) hosted a gathering of leaders and industry specialists to discuss the value of certification across a variety of industry sectors. The gathering, which brought together more than 40 industry professionals, was a multi-disciplinary affair including representatives from a variety of industry verticals including healthcare, manufacturing, government, associations and more. Different than many conferences, the meeting had an overtone of action and participants were engaged to offer their feedback and recommended actions that would lead to successful follow-on activities.

Overview of the Summit

1 — *Pre-conference work*
- Survey
- Environmental Scan
- Theme Identification & development

2 — *Set the Stage*
- Summit objectives
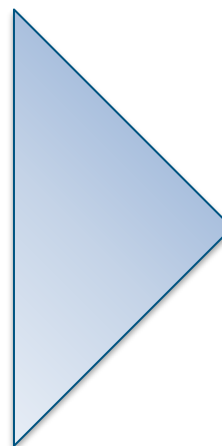- Pre-conference survey results
- Panel session

3 — *Theme Discussion Breakout Sessions*
- Define themes
- Identify key issues
- Prioritize top 3

4 — *Action Plan*
- Develop Action plan to address top issues
- Identify Timeline and priority

- ✓ **Clear understanding of the issues**
- ✓ **Action plans to address them**
- ✓ **Next Steps**

Objectives for the Conference

To identify important issues in credentialing and actions required to address them

The Day's activities included the following:

- Set the stage for the day
- Review what was said in the survey
- Panel discussion to explore credentialing across different sectors
- Theme and issue discussion
- Issue prioritization
- Action plan development

5 Themes

3 Priority Issues per theme

Action Plan

Agenda for the Day's Activities

9:00 – 9:15	Opening Remarks
9:15 – 9:25	Objectives for the Conference
9:25 – 9:55	Pre-Conference Survey Results
9:55 – 10:55	Panel: Value of Credentialing in a changing environment

Break (20 mins)

11:15 – 11:45	Introduction to today's themes & breakouts
11:45-12:00	Break into groups & identify team responsibilities

Lunch (60 mins)

1:00 – 1:45	Theme Brainstorming and Discussion
1:45 – 2:15	Theme Presentations (2 groups)

(Break 15 mins)

2:30 – 3:15	Theme Presentations (3 groups)
3:15 – 4:15	Action Plan Development
4:15 – 4:45	Closing Remarks and Next Steps

Major Outcomes - Themes

- Attendee's self selected the themes they would participate in
- Group distribution was fairly even with the exception of the Value of Certification group
- While ranked highly in the survey and discussed as a key issue in the panel discuss the "**Focus on Outcomes/Value of Certification**" group did not have enough participants so attendee's were asked to join the **"Challenges to Credentialing Group"** and bring up value issues within that discussion

Themes
Challenges to Credentialing (I and II)
Testing and Evaluation
Career Competency/Professional Development
Credentials and Micro-credentials (alternative pathways)
Focus on Outcomes/Value of Certification

The "Focus on Outcomes/Value of Certification" theme was rolled into "Challenges to credentialing" and divided into 2 separate groups

Panel Session Summary

Topic: Value of Credentialing in a changing environment including
Tom Granatir (American Board of Medical Specialties)
Cary List (Financial Planning Standards Council of Canada)
Jason Tyszko (U.S. Chamber of Commerce Foundation)

Tom Granatir

- Business of credentialing is facing anti-recertification legislation and sentiment
- Maintenance of credentialing was introduced 15 years ago but is facing backlash
- Factors influencing credentialing now include
  - Anti certification legislation
  - People's expectations changing with technology advances
  - Assessment issues
- Relevance of recertification is being questioned
- Does testing prove that someone knows what they are doing?
- Challenges to recertification is causing challenges to the original certification process

Cary List

- The relevance and value of credentialing are being questioned
- A certification process was created for Financial Planning 30 years ago
- Certification has support but he is now facing "me too" certifications
- The original point of the Financial Planning certification was to provide value to the consumer but he says he does not believe the consumer knows what the different credentials mean or what the differences are
- Should be focusing more on employees for credentialing vs. consumers
- Need to work more with business as partners in credentialing
- Ontario is asking for certification of financial planners but have also asked for testing of knowledge learned vs skills and ability to do the job

Monday, May 7, 2018

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7

Panel Session Summary (cont'd)

Topic: Value of Credentialing in a changing environment including
Tom Granatir (American Board of Medical Specialties)
Carey List (Financial Planning Standards Council of Canada)
Jason Tyszko (U.S. Chamber of Commerce Foundation)

Jason Tyszko

- Need to connect workforce needs to education to improve stream of people entering industry
- Need to enhance business leadership role
- Economy is competing more and more for talent
- He is helping companies with workforce planning
- Working to help companies signal need for education, experience, and credentials needed to grow
- Trying to build talent and skills pipeline for business through technology
- Building database of credentials

- Will get anonymized data faster from employers
- Need to link outcomes associated with credentialing
- Need more transparency of credential quality and validation
- Have to communicate credibility and value…move ore to skill and competency based credential
- Urgency to address industry created credentials
- Definitions are an issue to overcome, need business to communicate skills and competencies to develop and recognize credentials

Breakout Questions – Brainstorming and Actions

Questions asked during two separate breakout sessions included:

Breakout 1: Theme Brainstorming questions:

a)   Provide a **description** of the theme as understood by your group (there was an overview of the themes and related issues provided in the pre-conference package). Discuss the issues that make up the theme

b)   Why is this theme **important**? Why is it more important than the other themes?

c)   Which issues are achievable in a **five year timeframe**? Focus on the issues that are attainable.

d)   Discuss and identify the top 3 issues in terms of **priority/importance**

e)   Focusing on the top 3 issues what **stakeholders** should be engaged to address the issue?

f)   Identify the **barriers, risks and challenges** that you foresee in addressing each of the top three issues

Breakout 2: Action planning questions:

a)   What **information/resources/research** do we need to move forward to support each of these issues?

b)   Are there ideas on how you feel this work can be completed? What would be the **timeline** required to get this done and what **participants** would need to be involved?

c)   Other **comments/thoughts**?

(Some Groups were not able to complete all questions – all data captured in the process is represented in the next 2 sections – Themes Brainstorming and Actions)

Theme: Challenges to Credentialing - I

Theme Brainstorming Breakout Session

Description	• We are in an environment where certification is running into a hostile social and political environment - anti regulation, anti testing, resistance to maintenance of certification. • Data is lacking on the benefits of credentialing • Clarity of purpose – what is a certification supposed to say? Do we want to assess competencies other than knowledge? • Also clarity of what users (certificants, employers, consumers) are looking for
Importance	• We need to know what data to collect. Having a clear benchmark of what level of competence and in what areas we are looking to certify will allow us to conduct evaluations. • Knowing this may also allow us to decide how we want to respond to some of the employers who want "soft skills" to be certified, as well as decisions about how we move to a more continuous
Five year timeframe	• Credentialing organizations can move beyond assembling data themselves. We can get better at tying together data from disparate sources • We can do more to reach agreement across stakeholders about what certification means and what is needed. We can engage stakeholders (e.g., employers, consumers) and ensure clear communication
Stakeholders	• We make a lot of assumptions about who the stakeholders are and what they are looking for. We need to think through categories of stakeholders and figure out who to talk to • For the **users** of certification, we need to figure out whether we're meeting their needs. We also need to figure out what is feasible for **participants** in certification programs • Higher education, professional associations, and governments and regulators, are among the stakeholders we probably need to do a better job of engaging with
Barriers, risks and challenges	• Strategic vs operational risks. People need to be able to let go of products and processes that stakeholders are vested in and attached to • Broader political and social environment – backlash against regulation and testing.

Theme: Challenges to Credentialing - I

Information, resources, research	• Developing a mechanism for collecting and reporting information pertaining what certifying organizations are doing (program policies and protocols, but also potentially information that could be used to evaluate the value of the certification program)
	    • Capturing data through the annual report (e.g., NCCA accredited orgs must complete the information, but the reporting feature would be available to all ICE member orgs, if they would be willing to either provide their own "annual report" information or willing to pay for access to the database)
	    • Developing a reporting tool so organizations can see industry benchmarks and what others are doing (e.g., available only to ICE members)
	• Conducting "research" (broadly defined, could be framed as program evaluation) to evaluate the value proposition for the certification program for various sectors
	    • Develop framework for conducting this research, potentially separate frameworks for different stakeholder groups
	    • Potential Outcomes
	        • ROI for individuals and organizations
	        • Practice-related errors
	        • Disciplinary actions
	        • Joint commission requirements
	        • Break on insurance rates
	    • Developing a mechanism/tool for organizations to share the results of their research (methods, results, etc.)
	• Finding examples of cases where certification is effective. Identify case studies, best practices that promote the narrative that quality certification can be an effective signal of quality. We can create a mix of quantifiable and emotional messages that support certification.
	• Create support for best practices in credentialing. Promote high quality, rigorous models of certification. Be better at selling ourselves.
	• Build clarity of purpose about quality certification within the field. Build a common statement/vision of what the end purpose of certification is

Timeline and Participants	• Identify a common set of questions by which we can gauge the value of certification and advance a broad-based value proposition • There should be an effort to build certification's overall profile as a type of credential. This might be in part a branding exercise • ICE could create a generic self-evaluation template for certifications. This could involve refreshing ICE's existing value of certification toolkit

Theme: Challenges to Credentialing - II

Theme Brainstorming Breakout Session

Challenges with recertification:	• Frustration with recertification assessment (irrelevant, not meaningful, not understood, outdated, esoteric, knowledge-based)
	• Lack of empirical evidence that recertification works
	   • No defined link to knowledge or competence
	• Overall burden on certificants (e.g., time, money)
	• Recertification is geared to have value to the "non-paying customer" (i.e., protecting the public or raising the standard of care)
	   • Resistance to recertification as experience is not taken into account and the process is seen as not adding value
	• Sub-specialization / meaning of the credential
	• Multiple recertification models reflecting multiple philosophical perspectives regarding the purpose of recertification

Challenges with establishing the value of certification	• Difficulty in conducting "outcomes" based research (access to quality data) • Multiple stakeholders with various interests (different concepts of "value")

Theme: Challenges to Credentialing - II

Action Planning Breakout session:

Potential Roles for ICE	• What role should/could ICE play in promoting research designed to demonstrate the value of certification?
	    • Should NCCA Standards be modified to require certifying orgs to engage in research to demonstrate the value/effectiveness/etc. of the credential?
	    • Could ICE provide a mechanism for organizing, consolidating, categorizing, or summarizing that kind of research?
	• Could there be a mechanism for ICE to collect relevant benchmarking info from all accredited programs (distinct from business of certification benchmarking surveys) and share in some type of reportable format, with the goal of incentivizing programs to improve?
	    • Could data be collected in the annual report?
	    • This could be a benefit of being an NCCA accredited program
	• Could ICE develop accreditation standards that focus solely on the assessment components of a credential? What standards exist to ensure the quality of licensure exams owned/operated by the states?

Theme: Career Competency/Professional Development

Theme Brainstorming Breakout Session

Description	• The Issues encompassed in this theme of Career Competency/Professional Development:
	   o There is no universal agreement on the value of career competency and professional development programs
	   o The terminology regarding competency is not well defined. Terms like competent, competency and professional development are in this space. IE career competency versus continual professional development
	   o General discussion of the methods used by the group members for ongoing professional development. There is a wide diversity of approaches used by the groups represented at the table
	   o Voluntary nature of the certification is part of the equation – The professional development path/course that will be used may be dictated by this distinction
	   o We must be able distinguish and achieve clear understanding of what certification is and what it means

Importance	• This issue is front and center in the raging maintenance of competency debate and the blowback being received • The nature of the work covered by the certification may make the certification and recertification processes to be high stakes • This theme is wide ranging and can encompass other themes at this meeting
Five year timeframe	• Clarify the message on the purpose of the credential at different points in a career path • Standardize the terminology • Defining the value of recertification (continuing competency) for the employer and other stakeholders to include legislators • Integrating the components of certification and recertification processes to assure they are congruent and consistent and they achieve their stated importance

Theme: Career Competency/Professional Development

Top 3 Issues	1. Standardize the terminology 2. Clarify the message on the purpose of the credential at different points in a career path 3. Defining the value of recertification (continuing competency) for the employer and other stakeholders to include legislators

Stakeholders	1. Standardize the terminology
	    • Credentialing body
	    • ICE
	    • Standard setting organizations
	2. Clarify the message on the purpose of the credential at different points in a career path
	    • The certifying organization
	    • The accreditation bodies
	    • ICE
	    • HR groups.
	3. Defining the value of recertification (continuing competency) for the employer and other stakeholders to include legislators
	    • The credentialing organization
	    • Accreditation organizations

Barriers, risks and challenges	1. Standardize the terminology
	    • The certification organizations which have/use long used current definitions
	2. Clarify the message on the purpose of the credential at different points in a career path
	    • Difficult, resource intensive task
	    • Litigious nature of the environment
	    • Risk – Increased liability
	3. Defining the value of recertification (continuing competency) for the employer and other stakeholders to include legislators
	    • Difficult task and there is a lack of evidence to support our position
	    • Risk of liability
	    • Resource intensive task

Theme: Career Competency/Professional Development

Action Planning Breakout session:

Information, resources, research	1. Standardize the terminology
	    • ICE assembles a workgroup to formulate a glossary of the terminology
	    • Must do an environmental scan of materials available
	    • Must do an environmental scan of how the terms are used now outside the certification industry
	2. Clarify the message on the purpose of the credential at different points in a career path
	    • ICE establishes a framework for assembling the information
	    • Environmental scan on what has been done; what exists now
	    • Write the white paper /position paper
	3. Defining the value of recertification (continuing competency) for the employer and other stakeholders to include legislators
	    • Research data comparing:
	       ○ Identify research data points that could inform continuing competency in a given role
	       ○ Case studies of those groups doing well
	       ○ Comparisons of results from certified versus not certified – Outcomes research
	       ○ Survey stakeholder perception of the value of certification processes

Timeline and Participants	1. Standardize the terminology
	    • Focus groups to gather needed information
	    • Workgroup to assemble
	    • Time needed – 1 – 2 years
	2. Clarify the message on the purpose of the credential at different points in a career path
	    • ICE R&D Committee
	    • Literature Review to start
	    • Best Practices Literature Review – 1 year
	    • Write the framework – 1 year
	    • Compilation of Results – I additional year – Three years total time needed
	3. Defining the value of recertification (continuing competency) for the employer and other stakeholders to include legislators
	    • Case studies and stakeholder surveys – 1 - 2 years
	    • Outcomes Research – 3 – 5 years
	    • Identifying research data points could be done in 1 – 2 years.

Theme: Credentials and Microcredentials

Theme Brainstorming Breakout Session

Description	• The group views the topic of micro-credentialing as being a disruptor to the credentialing process and we feel ICE has a real opportunity to become the thought leader around this space
	• We identified from the pre-summit package these issues:
	    o There is a lack of understanding around the micro-credentialing landscape and the value or lack of value provided
	    o This is mostly due to the confusion in the market place as to the differences between micro-credentials, badges, certificates, and certifications
	    o Badges are misunderstood to be synonymous with micro-credentials

Importance	• Organizations are already creating microcredential products so it's already a disruptor within the credentialing world. Again, this is an opportunity be a thought leader • Consumers have a need for more specialized assessment programs and micro-credentials are filling this need • There is another need to provide a life-long relationship (journey) with certification holders which well-defined micro-credentials could fill. We question if continuing education requirements are enough • Due to the lack of validity/credibility around micro-credentials, certifying bodies that value accreditation are reluctant to develop micro-credentials and we are finding it difficult to stay competitive with the pretenders that don't value accreditation • Getting involved in defining micro-credentialing would bring validity/credibility and hopefully eliminate under-valued programs developed by the pretenders? • Lastly, this involvement could broaden the value of ICE and its community o Alternatively, doing nothing could cede the future of credentialing to anyone who steps into the space and sets the bar for implementing them
Five year timeframe	• Establish an industry definition to fit into credentialing models • Establishing best practice/guidelines for micro credentialing (need to be agile in what we present to market) • Engaging all stakeholders during the definition stage

Theme: Credentials and Microcredentials

Theme Brainstorming Breakout Session

Priority & Importance	• Development of a clear definition • Development of framework on how it fits into various models of credentialing • Development of best practice/guidelines
Stakeholders	• Employers • Academic community • Membership organizations • The certificants (earners and potential earners) • Third-party payers • Certification boards • Regulatory boards • Consumer advocacy groups • Association of Talent Development (ATD)
Barriers, risks and challenges	• Requires significant resources and a sustained effort • ICE would have to identify the business model to justify the investment • Current ICE standard development process is a barrier • Time is a barrier to ensure the research is still relevant • Micro credentials could dilute the value of actual credentials • Indirect competitors (ANSI and ADP) • Catch up with the trend relating to perception of certification and micro-credentials. • Can we bring all the identified stakeholders to the table?

Theme: Credentials and Microcredentials

Action Planning Breakout session:

Information, resources, research	• The issues are very similar, so they were grouped together
	• Developing definition of micro-credential, developing framework/guidelines, developing a standard
	• Conduct research to identify whether there is a good business case for ICE to develop a set of standards.
	• Information - Ask the identified stakeholders:
	    ○ What is the current terminology being used?
	    ○ Why they are turning to micro-credentialing?
	    ○ What is the need that is being filled that traditional certifications don't?
	    ○ What risk and opportunities are there for certifying bodies?
	• Resources –
	    ○ Staff
	    ○ Volunteer task force
	    ○ Time and money
	    ○ Hiring a research firm – later decision
	• Research –
	    • Gather data from the accredited groups
	    • Such as:
	        ○ Current terminology
	        ○ What industries have implemented micro-credentials
	        ○ What models are in use
	        ○ Look into other ways to create standards in a faster manner

Timeline and Participants	• Conduct the research to set definitions and the fleshing out of a framework • 18 months to present the research results at the 2019 Annual Conference • At this point, ICE decides to or not to go forward with developing the standard

Monday, May 7, 2018

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19

Theme: Testing and Evaluation

Theme Brainstorming Breakout Session

Description	• **Security issues**
	    • Remote proctoring
	    • Un-proctored exams
	    • Curriculum embedded assessment
	• **Test design considerations**
	    • Artificial Intelligence
	    • Technology
	    • Conformance to standards
	    • Changes to test development
	    • Skills assessment
	    • No longer just one cut score – levels of performance?
	    • Employer needs
	    • Evaluating a team - accreditation
	    • Meta certification – how to inform employers
	    • Small volume program issues – fragmentation to credentials
	• **Validation arguments**
	    • Validation processes – content and criterion
	    • Claims made about the assessment – soft skills?
	    • Rate my _____ -- 360 evaluations for continuing competence, also for entry?
	    • Experience API? Learning resource analysis -- Can this be used for credentialing?

Importance/Priority	• Test design considerations and validation – more real work-like situations, rapid development of examinations, assessing different skills, using technology for simulations and performance based testing, the impact of a microcredential on validity • Remote proctoring – greater effect on voluntary certification (less critical for licensure); technology has improved in recent years • Small volume program issues – with more focused credentials, smaller volumes are expected; what sort of validity evidence is needed? (if different)

Theme: Testing and Evaluation

Theme Brainstorming Breakout Session

5-Year Timeline	• **Delivery methods**
	   o Remote proctoring – 4 major concerns identified in 2015 R&D study, what's needed to ensure acceptance by NCCA? Research needed, compare remote to brick and mortar proctoring (secret shoppers?). *Good progress expected in 5 years*
	   o Un-proctored exams
	   o Curriculum embedded assessment
	• **Test design consideration** *Good progress expected in 5 years*
	   o Artificial Intelligence
	   o Technology
	   o Conformance to standards
	   o Changes to test development
	   o Skills assessment
	   o No longer just one cut score – levels of performance?
	   o Employer needs
	   o Evaluating a team - accreditation
	   o Meta certification – how to inform employers
	• **Validation arguments**
	   o Validation processes – content and criterion
	   o Claims made about the assessment – soft skills (?)
	   o Rate my ____ -- 360 evaluations for continuing competence, also for entry?
	   o Experience API? Learning resource analysis -- Can this be used for credentialing?
	• **Small volume program issues – fragmentation to credentials**

Stakeholders	• Test design considerations and validation – psychometricians, credentialing bodies, key industry players, employers, educators, professional associations, regulators, accreditation agencies (e.g., NCCA Commissioners), as well as anybody else who needs to understand… • Remote proctoring – above list, plus current credential holders; public (for licensure) needs reassurance of credibility • Small volume program issues – same list

Theme: Testing and Evaluation

Theme Brainstorming Breakout Session

Barriers, Risks and Challenges	• Time and money – applies to all three issues • Legacy thinking • Traditions for a conservative industry • Disruptive technology • Distinction between selection instruments (for employers) and certification; additional legal scrutiny for selection

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22

Theme: Testing and Evaluation

Action Planning Breakout session:

Information, resources, research	• Delivery methods
	    ○ Research comparing delivery methods (remote vs. on-site)
	• Test design and validation
	    ○ Responsibility of individual organizations to decide the intent of the certification program
	• Small volume program issues
	    ○ ICE R&D committee work underway

Timeline and Participants	• Delivery methods
	    ○ Research comparing delivery methods (remote vs. on-site), verified as being unbiased
	    ○ ICE can help define criteria for evaluating research to ensure lack of bias
	• Test design and validation
	    ○ Responsibility of individual organizations to decide the intent of the certification program
	    ○ ICE can help by encouraging organizations to be proactive (e.g., soft skill R&D project)
	    ○ Differentiating selection instrument development for employers from certification examination development
	• Small volume program issues
	    ○ ICE R&D committee work underway

Analysis and Key Takeaways – Overall

- The summit sought to identify issues around credentialing that can be further explored & researched to advance the business of credentialing and prove its value.

- It also intended to explore the value of certification across members of multidisciplinary industry verticals and identify common underlying aspects of certification

- The outcome of the meeting achieved the objective set forth by clearly articulating the following elements through the breakout teams and general discussion
  - A comprehensive understanding of the credentialing environment
  - Clear understanding of the issues
  - Action plans to address them
  - Identification of Next Steps

- The urgency of defining and articulating the value of credentialing was a key output of the summit

Analysis and Key Takeaways - General

- General outcomes that emerged from the Convening included:
  - A general agreement on the issues surrounding credentialing and that the business of credentialing is currently "under threat"
  - In particular, there seems to be consensus that the value of credentialing is not well defined putting future progress at risk
  - There was a strong environment of collaboration and teamwork across all summit participants
  - There continues to be "disruption" from external forces in the credentialing environment including microcredentials, political, regulatory and social forces
  - The relevance if "re-certification" is currently being questioned which challenges the long term viability of certification as a whole
  - There was a desire to see a single organization take a leadership role to address credentialing issues and push the action plans
  - Participants would like to demonstrate and measure progress on the actions identified at the summit at least yearly or possibly even twice/year
  - Technology could be a key enabler to help aggregate data and provide a platform to analyze and support the case for credentialing value
  - There are a variety of stakeholders in the credentialing "value chain" with unclear expectations and value to each of them

Analysis and Key Takeaways - Issues

Challenges to Credentialing

- Anti regulation, anti testing, resistance to maintenance of certification are all impacting the certification environment today
- Data is lacking on the benefits of credentialing – need to identify data required to prove the relevance of certification
- Clearly identifying stakeholders and the value of credentialing to each is important
- Certification in itself is burdensome – it requires time and money to implement
- The credentialing environment is becoming complex and disparate as "microcredentials" and others emerge

Career Competency & Professional Dev't

- No universal agreement on the value of career competency and professional development programs
- Terminology regarding competency is not well defined and complicates the process
- Industry processes vary widely relating to career competencies – increases complexity/transfer
- Voluntary / Mandatory nature of certification causes confusion
- Distinguishing and achieving a clear understanding of what certification is and what it means is critical

Credentials & Microcredentials

- Micro-credentialing is a disruptor to the credentialing process general feeling that ICE has an opportunity to become a thought leader to support credentialing in general
- There is a lack of understanding around the micro-credentialing landscape and the value or lack of value provided
- There is confusion in the market place as to the differences between micro-credentials, badges, certificates, and certifications – they have confused the market and need to be addressed
- need to provide a life-long relationship (journey) with certification holders which well-defined micro-credentials could fill

Testing & Evaluation

- Advances in testing design and proctoring are required
- Key areas to focus on include security issues relating to assessment, test and design considerations (development, use of technology etc..) and the validation of knowledge including the process, type of skills and experience
- Test design considerations and validation require work-like situations, simulations, assessing a variety of different skills, improved use of technology

Analysis and Key Takeaways - Actions

Challenges to Credentialing

- Develop a mechanism for collecting and reporting information about what certifying organizations are doing (program policies and protocols, certification value)
- Conduct "research" to evaluate the value of certification programs for various sectors
- Create best practices in credentialing - promote high quality models of certification
- Build clarity of purpose about quality certification within the field. Build a common statement/vision of what the end purpose of certification is

Career Competency / Professional Dev't

- Need to standardize the terminology where ICE could play a key leadership role
- Clarify the definition, meaning and purpose of the credential at different points in a career path – I'C.E would be well positioned to lead and develop this content
- Continued support for HR groups – whitepapers, positioning papers, support documentation
- Define the value of recertification (continuing competency) for the employer and other stakeholders – case studies, research comparisons etc…

Credentials & Microcredentials

- Conduct research to identify whether developing a set of standards is worthwhile
- Identify and align key terminology
  - What is the current terminology being used?
  - Why they are turning to micro-credentialing?
  - What is the need that is being filled that traditional certifications don't?
  - What risk and opportunities are there for certifying bodies?
- Gather data and resources to support credentialing organizations and people

Testing & Evaluation

- Identify & research delivery methods and identify the best-fit model for the certification (remote vs. on-site etc..)
- Support organizations / certification bodies in the definition of credential value and benefit
- Continue to develop and support R&D work via the ICE committee to support small volume program issues

Institute for Credentialing Excellence Summit
Monday, May 7, 2018

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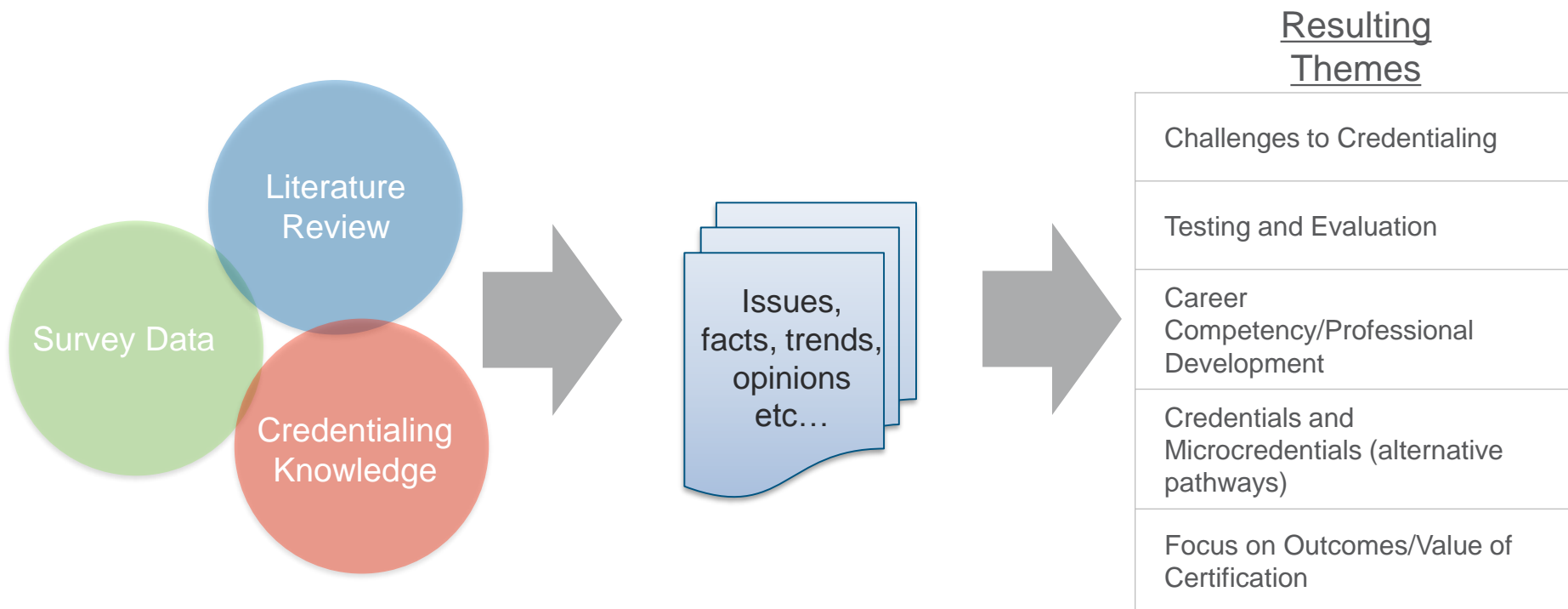
27

Specific Actions Identified for ICE

- Offer member specific services such as
  - A database of information available to be searched to access credentialing related information (benchmarks, value, statistics etc.)
  - Develop research frameworks/guidelines to generate relevant data relating to credentialing
  - Provide mechanism to add member organizations data to the database to support broader credentialing
- Build clarity of purpose around credentialing - build a common statement/vision of what the end purpose of credentialing is to engage participants
- Develop a broad-based value proposition for credentialing across industries and roles
  - Could NCCA Standards be modified to require certifying orgs to engage in research to demonstrate the value/effectiveness/etc. of the credential?
  - Could ICE provide a mechanism for organizing, consolidating, categorizing, or summarizing that kind of research?
- Develop accreditation standards that focus solely on the assessment components of a credential – identify what standards exist to ensure the quality of licensure exams
- Standardize terminology around credentialing to create clarity around the definitions, value, types and purpose of credentialing through focus groups, leading workgroups and general stakeholder engagement programs
- Create an career guide that clarifies the purpose of the credential at different points in a career path – this would involve a literature review, best practice development, framework development and measurements of results
- Clearly define the value of recertification for the employer and other stakeholders of credentialing involving case studies and surveys, research and identification of facts and supporting data
- Develop best practices to support the testing and evaluation for credentialing that support delivery methods, testing and evaluation procedures/methods and

Next Steps

- The Summit was incredibly successful at defining the issues and identifying to support the business of credentialing. As important was the ability to generate awareness and create momentum for the issues across the organization's in attendance

- ICE has an opportunity to build on this momentum and advance a focused agenda by working with the attendee's organizations collaboratively to further develop and execute action plans to prove the value of certification and lead the way to even greater support for credentialing across a wide variety of industry verticals

- Now is the time to aggressively push forward by identifying the key areas of focus, developing collaborative plans to address the focus areas and measuring progress along the way

- Key actions include development of the following high level components of the ICE plan:
  1. What does the final objective for the work look like? How will we know when we are done?
  2. How will the work get done? Who funds and what does that mean for control of the plan?
  3. Who will lead and who will support the work, both organizationally perspective and individually? Who governs the work?
  4. When – an overall plan for the work needs to be developed with clearly articulated timelines – what are these timelines and who will develop the plan?

- While the summit proved successful in the identification of issues and required actions it was clear that these issues have been discussed in the past and there is growing concern with the progress made towards answering the outstanding questions and resolving stated issues

- There is clear need for a lead organization to take on the responsibility of addressing these issues and rallying support organizations to assist in the process

- Measuring the progress and impacts of these initiatives is critical moving forward – there is a need and desire to report back to member organizations on the work being done and the goals being achieved

Appendix A – Overview of Themes

Themes Background

Survey Data

Literature Review

Credentialing Knowledge

Issues, facts, trends, opinions etc…

Resulting Themes

Challenges to Credentialing
Testing and Evaluation
Career Competency/Professional Development
Credentials and Microcredentials (alternative pathways)
Focus on Outcomes/Value of Certification

Themes have been distilled from a variety of data points and a deep knowledge of the business of credentialing

Overview of Themes

Theme Name	Description
Challenges to Credentialing	Current and future threats to credentialing: negative views of testing, competition from low-cost, low-stakes programs, certificant push back on maintenance of certification rules and requirements, and the potential for litigation.
Testing and Evaluation	Embrace alternative testing and evaluation methods for certification and maintenance of certification while ensuring validity. Continue to focus on testing security. Accreditation standards need to keep pace with changes.
Career Competency/Professional Development	Credentialing supports career development and job performance.
Credentials and Micro-credentials (alternative pathways)	There are more ways to earn credentials and less reliance on formal certification. Micro-credentials are gaining prominence.
Focus on Outcomes/Value of Certification	Link certification to improved outcomes. Demonstrate the value of certification as it relates to increased public safety.

Appendix B – Attendee list

Summit Attendee's

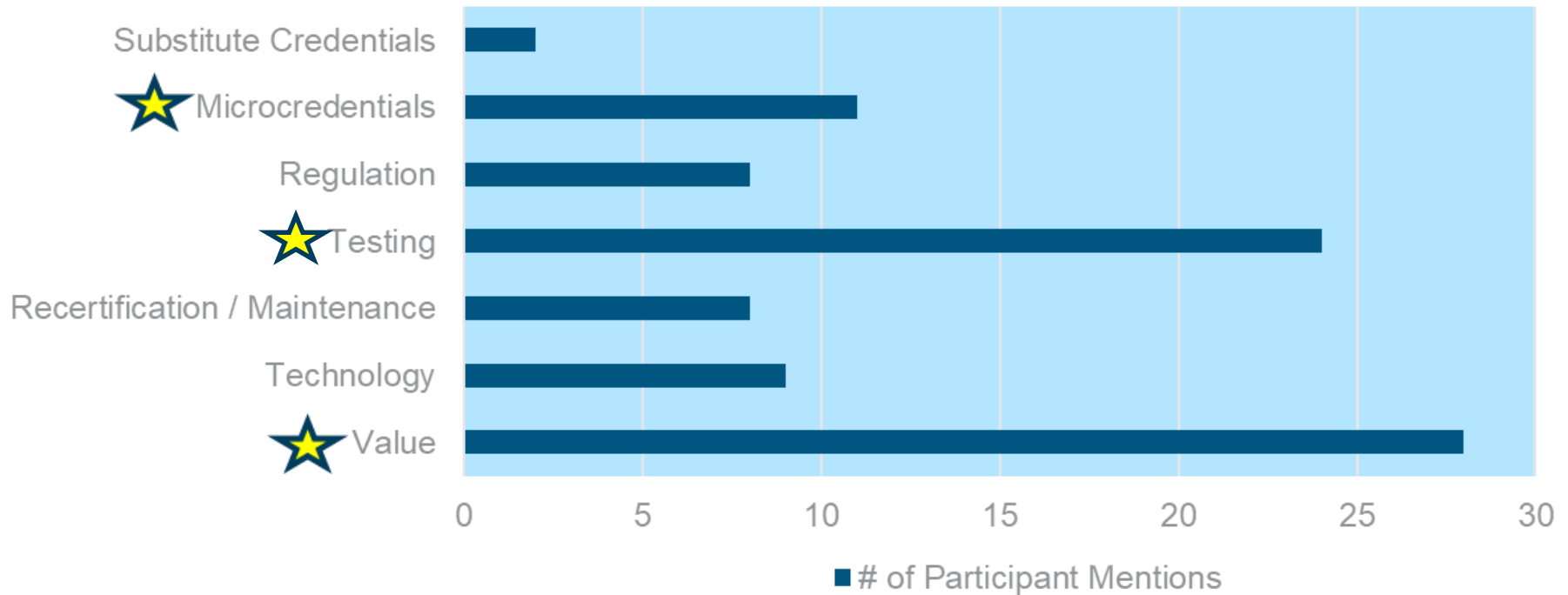| Name	Organization
Andy Dwyer	American Board of Pediatrics
Bill West	Pearson VUE
Brian Greenlee	American Council On Exercise
Cary List	Financial Planning Standards Council
Chad Buckendahl	ACS Ventures, LLC
Christopher Butcher	Heuristic Solutions
Cyndi Miller-Murphy	Oncology Nursing Certification Corporation
Danielle Sadighi	American Medical Certification Association
David Rozsa	Metacred, Inc.
Denise Roosendaal	Institute for Credentialing Excellence
Don Balasa	American Association of Medical Assistants
Grady Colson Barnhill	National Commission on Certification of Physician Assistants
Isabelle Gonthier	Yardstick
Janice Moore	SeaCrest Company
Jared Zurn	National Council of Architectural Registration Boards
Jason Tyszko	U.S. Chamber of Commerce Foundation
Jeff Kelly	Alpine Testing Solutions, Inc.
Jerry Reid	American Registry of Radiologic Technologists
Jim Henderson	Castle Worldwide, Inc.
Jim Stobinski	Competency and Credentialing Institute
John Wickett	Wickett Measurement
Johnna Gueorguieva	Dental Assisting National Board, Inc.
Kevin Bradley	Human Resources Research Organization
Kim Cohen	ISACA
Kyle Albert	Harvard Grad Student
Larry Fabrey	PSI Services
Linda Lysoby	National Commission for Health Education Credentialing
Linda Waters	Prometric
Nick Soto	Construction Manager Certification Institute
Pat Muenzen	Professional Examination Service
Paul Grace	NBCOT
Rick Meadows	American Academy of Nurse Practitioners Certification Board
Sarah Kiley	Parchment
Stephanie Dille	Proctor U
Tom Granatir	American Board of Medical Specialties
Trish Young	Kryterion, Inc.
William Ellis	Board of Pharmacy Specialties
Lisa Kamen	National Board of Certification and Recertification for Nurse Anesthetists

Organizing Committee
- Denise Roosendaal (ICE)
- Doug Weinbaum (ICE)
- Melissa Biel (Biel Consulting)
- Tim Skelly (Stratford Managers)
- Dave Randall (Stratford Managers)

Appendix C – Survey Overview

Summary of the Pre-Conference Survey

Top Mentioned Factors Affecting Credentialing

- Substitute Credentials
- ⭐Microcredentials
- Regulation
- ⭐Testing
- Recertification / Maintenance
- Technology
- ⭐Value

■ # of Participant Mentions

Issue Mentioned

Value ⭐

Technology

Maintenance

Testing

Regulation

Microcredentials

Substitute Credentials

"Evidence that shows the performance of those certified delivers a measurable, unique value or is "better" than those who do not hold certification"

Issue Mentioned
Value
Technology
Maintenance
Testing
Regulation
Microcredentials
Substitute Credentials

*"Alternative testing / evaluation methods for certification"*

"Virtual proctoring"

Issue Mentioned
Value
Technology
Maintenance
Testing
Regulation
Microcredentials ⭐
Substitute Credentials

"Increased acceptance/use of micro-credentials, including models that include stacking micro-credentials. While acceptance of micro-credentials is increasing, there is still confusion on how this term is defined."

Prioritization of Issues

Legend: Not a Priority | Somewhat a Priority | High Priority | Very High Priority
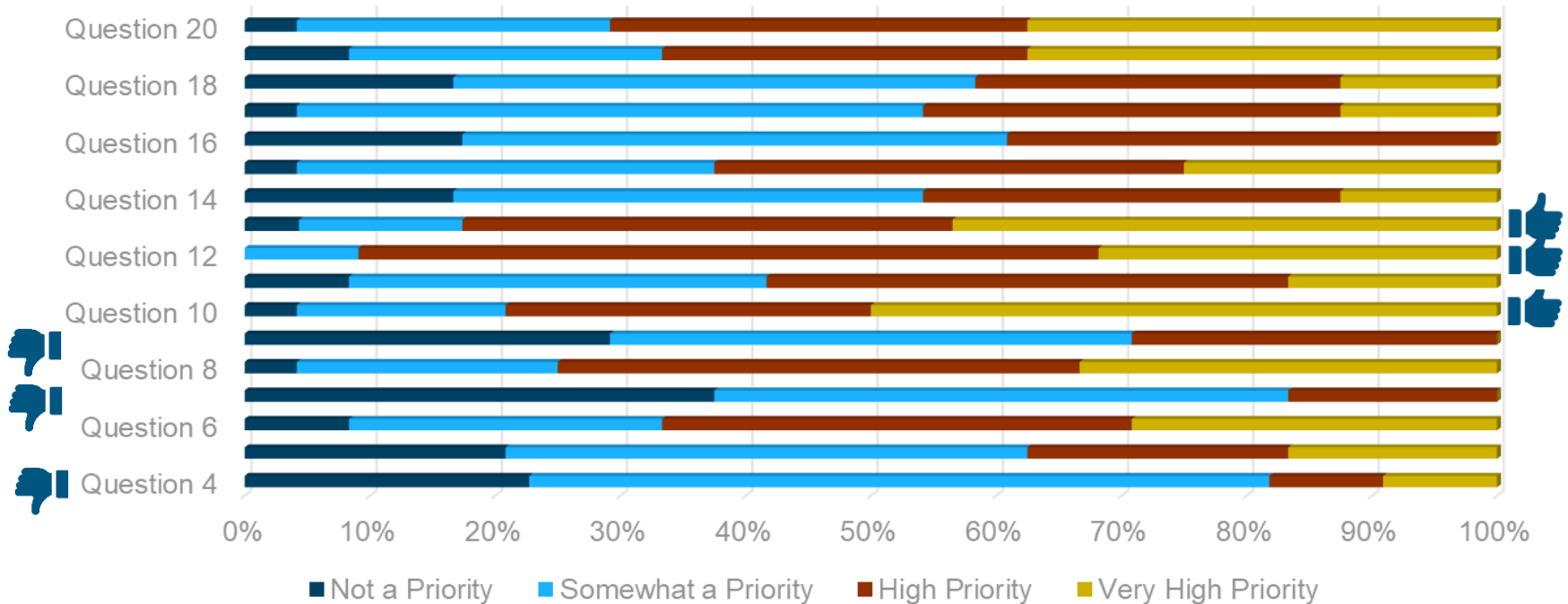
Top 3 Priorities

1) Question 12- Link credentials with skills and knowledge that can be demonstrated and applied in the marketplace.

 91% High or Very High Priority

2) Question 13 – Clarify the importance and value of continuous learning and education activities for certification maintenance.
83% High or Very High Priority

3) Question 10 – Create a stronger connection between certification / credentialing and employment.

 79% High or Very High Priority

Bottom 3 Priorities

1) Question 7 – Develop more opportunities for low stakes testing (non proctored).

   83% Somewhat of a priority or Not a Priority

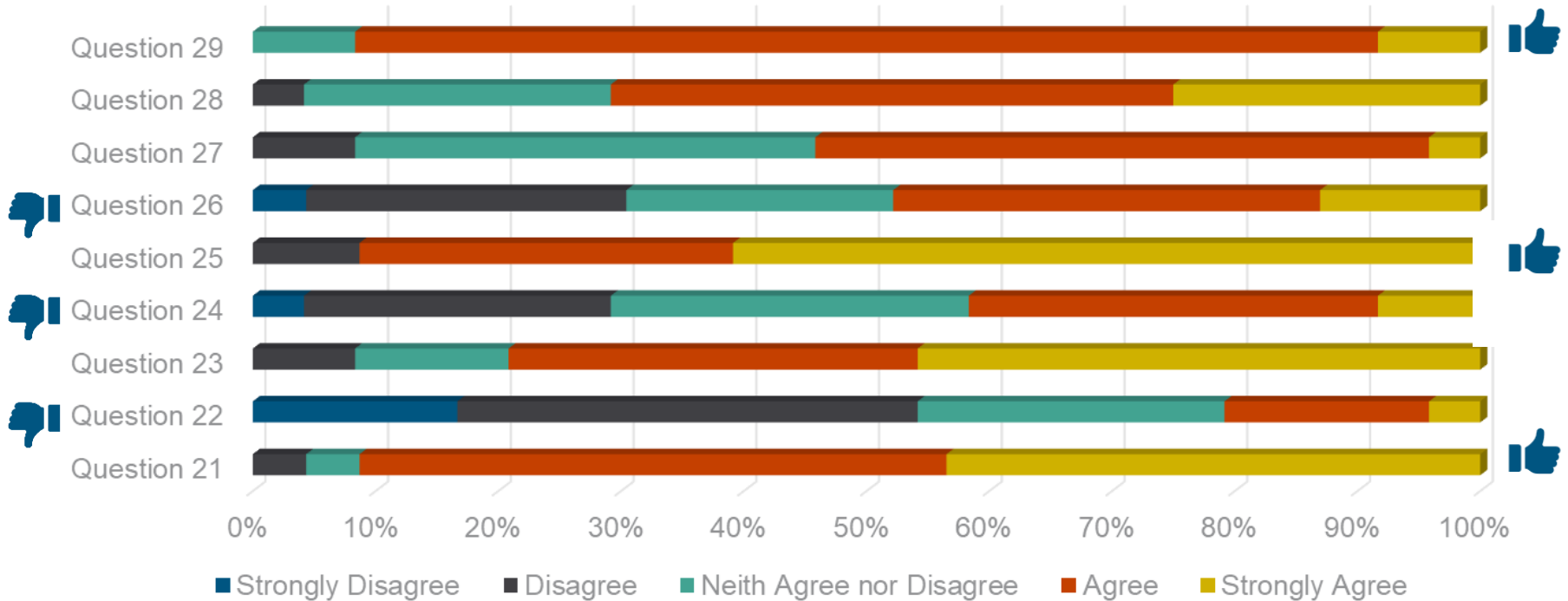2) Question 4 – Invest in electronic data sharing in credentialing with common data points.

   82% Somewhat of a priority or Not a Priority

3) Question 9 – Shift to technology based learning from instructor led training (ILT).

   71% Somewhat of a priority or Not a Priority

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Agreement Statements

- Strongly Disagree
- Disagree
- Neith Agree nor Disagree
- Agree
- Strongly Agree

Top 3 Agreements

1) Question 29- Credentials facilitate occupational transitions during a career life cycle.

    92% Agree or Strongly Agree

2) Question 25 – Measures other than increased worker earnings should be used to evaluate the success of certificate programs.
   91% Agree or Strongly Agree

3) Question 21 – Not all competencies are best assessed by exam.
   91% Agree or Strongly Agree

Bottom 3 Agreements

1) Question 22 – Employers must take a central role in developing credentialing programs.

   54% Disagree or Strongly Disagree

2) Question 26 – Non recognition of international credentials is a barrier to integrating international workers into the workforce.
   **32% Disagree or Strongly Disagree**

3) Question 24 – Developing a system of industry recognized, portable, stackable certifications is where education and business need to focus.

   29% Disagree or Strongly Disagree

Research Priority	Total Score from Ranking lowest score is top priority
Advances safety and improves quality	46
Recognized as validation of knowledge in the specialty	50
Improves culture, improves job satisfaction, empowerment, and confidence	75
Improves recruitment and retention, employment and job prospects	78

Question 31: What issue(s) in credentialing do you feel the urgency to address?

Question #32: What innovations are needed in credentialing organizations to maintain relevancy?

Frequency of Topic Suggested

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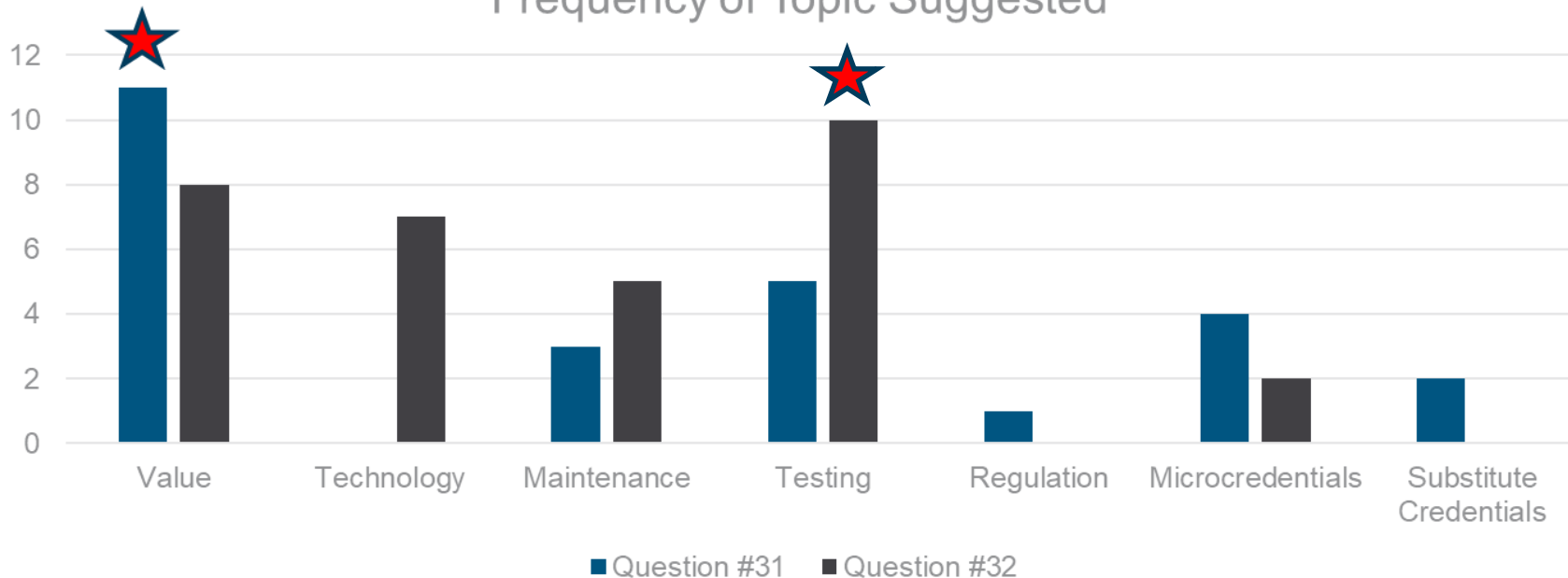
Appendix D – Event Sponsors

Dennis Faulk Contributors

Thanks!