



## *Certification Made to Suit ASSOCIATIONS NOW, June 2007*

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Next-generation credentialing programs recognize their public-protection mission, but do not offer certification alone. In order to fully serve their markets and become financially sustainable, credentialing agencies must adopt a businesslike approach and leverage all organizational assets to serve customers and fulfill their missions.

Picture this scenario: A stay-at-home mom who wants to re-enter the workforce as a clinical dietitian, hasn't practiced in five years, and wonders whether she's prepared. But both she and her future clients are in luck. The American Dietetic Association's credentialing agency, the Commission on Dietetic Registration (CDR), has her back.

She goes to [www.cdrnet.org](http://www.cdrnet.org) and purchases an "Assess and Learn" module. Unlike traditional online continuing education, CDR's Assess and Learn modules do not begin with educational content. Instead, the initial focus is on assessing the knowledge and skills of the professional. This assessment occurs within the context of case scenarios; the module presents patient information and asks her questions about how to provide quality care. Although the initial focus is on self-assessment, the tool is a valuable learning instrument because each assessment question is followed by feedback. The user receives an explanation for why each question option is correct or incorrect, current references, and links for additional information.

So the stay-at-home mom learns a lot while completing the module—especially about the nutrition-care process, which is a new patient-care model instituted since she stopped practicing. She also receives a detailed performance report that outlines her strengths and learning needs and suggests resources for further learning. Then she links back to CDR's website and its Continuing Professional Education (CPE) Database, where she conducts a search and finds additional relevant learning activities by subject, location, and date.

She has assessed her knowledge and skills, learned new information, and even developed a plan for participating in additional education. Armed with this information and her plan, she's confident she can prepare herself to return to practice and provide safe, quality care to her patients.

This situation is not unique; professionals return to practice or change practice frequently. What is unique is that she has a trusted resource to guide her and help make sure she is adequately prepared.

Next-generation credentialing agencies like the Chicago-based Commission on Dietetic Registration know that to fully realize their public-protection mission, they cannot offer certification alone. Additional products and services—such as the Assess and Learn series, CPE Database, and others—play a core role in ensuring that certificants practice safely and skillfully, even as credentialing agencies find new ways to serve their markets and become financially sustainable.

### **What Is Next-Generation Credentialing?**

Next-generation credentialing is a mindset. It's a way of thinking that centers on both customer needs and a commitment to quality. It is innovative, entrepreneurial, and sometimes unconventional. Although next-generation credentialing is characterized by a businesslike approach to product development and planning, it never focuses solely on profit as the motivation. Instead, it prompts you to carefully consider all your assets, both tangible and intangible, and look for ways to fully leverage those assets to fulfill your organization's mission.

Consumer protection is often the cornerstone of certification. Most programs fulfill their consumer-protection mission by providing a credential and maybe ancillary test-related materials as well. But most programs have the potential to do much more, thanks in part to the data you collect to define your profession and lay the foundation for a sound certification exam. Those data and related assets—such as item banks, intellectual capital, and technology

platforms, to name a few—can be repurposed to realize your consumer-protection mission, support your profession more fully, and create nonduces revenue for the organization.

Once you understand the concept behind next-generation credentialing, it's time to think about how to embrace it in your own organization's work.

### **Moving From Concept to Reality**

What can your traditional credentialing agency do to adopt a next-generation credentialing mindset?

**Be business minded.** Above all, remember that nonprofit is a tax status, not a business strategy. The government gives your credentialing organization a nonprofit tax shield because you pursue a mission that benefits society. This is a public trust you must honor.

However, your mission's altruistic nature doesn't render you immune to the market and financial realities that face any other business. You need to constantly identify new sources of revenue to ensure that you'll have the resources necessary to meet your obligation to serve the public interest. You also have to invest in rigorous market research, create business plans, and determine and evaluate return on investment.

An example of a disciplined approach to business decisions comes from the Denver-based Competency and Credentialing Institute, where all certification proposals come up for consideration by its board of directors. Proposals include reports on market research, projections about market penetration and potential competition, development costs, and strategic alignment. A clear understanding of these issues helps ensure that CCI remains fiscally and strategically strong.

**Expand your thinking beyond the test.** To be both profitable and mission driven, your credentialing agency needs to realize that credentials, while very important, aren't the only answer.

CCI—the leading certifier of nurses who work in the surgical setting—had been receiving requests from surgical-services managers, a subspecialty group within its primary certificant population, to create an exam unique to their role. These managers are key members of the healthcare team, and if they wanted to validate and promote their competency through certification, CCI wanted to respond to them.

So CCI did what many certification organizations do. It conducted a job analysis to validate the managers' role and did market research to quantify the interest level and determine a price point. Although the job-analysis study revealed enough data to support the unique nature of the role and therefore validate an exam, the market research revealed too little purchase commitment to make the certification exam profitable. CCI had to redirect its thinking.

Staff members asked themselves how they could use the data from the job analysis—a tangible asset—to create a quality program that met the needs of this subspecialty group and ultimately the patients for whom they cared. The staff wound up using data from the original market research to define a different product that included the features customers indicated they were looking for.

The resulting CCI Certificate Program for Surgical Services Management is a modular, evidence-based certificate program that doesn't just meet the competency-assessment needs of a larger segment of the management market. It also encourages learning, self-assessment, and the growth of professionals into a management role. Set to launch in July 2007, the program has already prompted requests from nearly 500 people who want information when the product is available for purchase. Routine email communication with audience members has kept them engaged in the launch process and informed about features and content. Not only is revenue from sales expected to return the initial investment within the first year, the program also has raised CCI's awareness of the potential of multipurpose tools to better serve surgical patients.

**Know yourself.** To fully leverage your organizational assets, you must first fully understand your organization's core competencies. An honest assessment of what your organization is good at—and, equally important, what it is not—will result in the best use of resources. This self-reflection is a valuable part of the strategic planning process. It includes a review of your financial resources, understanding of the factors that determined past successes and failures, staff size, intellectual capital, and industry position

Another element of the discussion is to identify where you want to invest to grow your skills (perhaps by hiring staff to fill knowledge or skill gaps) or where you can take advantage of partnerships (with your testing vendor or membership association, for example) to realize your goals. Partnerships can be key to making the most of resources when it's more efficient to collaborate with other organizations that possess complementary competencies. For example, although CCI understands assessment well, it realized it did not possess the staff

Although credentialing agencies often focus on a certification test, there are other programs, products, and services that can help you fulfill your agency's mission as you grow your markets and revenues. Here are three types, as well as the names and websites of some organizations that offer examples you can learn from.

**Competency-assessment modules.** Certification organizations are uniquely positioned to understand the areas in which their customers need learning and development. They're also skilled in assessment, which allows customers to learn new skills and content as well as measure what they've learned, adding a valuable element to the development process.

By developing learning modules that incorporate a checklist or some other assessment component, your credentialing organization can meet a primary need of many of your customers. These customers don't necessarily want a credential or certificate in a professional field; they merely want to develop and test their knowledge in a narrow topic, so they can function in a particular role. Competency modules provide another means to connect with your certificants and meet a subset of their assessment needs. Examples:

Project Management Institute's Assessment Tools:  
[www.pmi.org/info/pdc\\_employerspmassessment.asp](http://www.pmi.org/info/pdc_employerspmassessment.asp)  
Commission on Dietetic Registration's Assess and Learn Series:  
<http://cdrnet.org/products/product007.htm>  
Competency and Credentialing Institute's Competency Assessment Tools:  
[www.cc-institute.org/educ\\_cmod.aspx](http://www.cc-institute.org/educ_cmod.aspx)

**Curriculum-based certificate programs.** The purpose of these is generally to indicate that participants have completed specified education and met specific learning objectives. Program design varies, but in most cases there is a pre-assessment of some kind, followed by a specific course of learning, and ultimately a postassessment. Certificate programs are different from certificates of attendance because certificate programs generally include some form of assessment to confirm that the individual has attained the knowledge, skills, or competencies the certificate program focuses on. Examples:

Credit Union National Association's STAR Program:  
[http://training.cuna.org/self\\_study/star.html](http://training.cuna.org/self_study/star.html)  
Commission on Dietetic Registration's Certificate of Training in Adult Weight Management:  
<http://cdrnet.org/wtmgmt/certifica-teoftraining.htm>  
Competency and Credentialing Institute's Surgical Services Certificate Program:  
[www.cc-institute.org/educ\\_cp\\_flyer.aspx](http://www.cc-institute.org/educ_cp_flyer.aspx)

**Provider accreditation.** Many credentialing organizations require certificants to engage in continuing education to maintain their credential. One way to enhance the quality of the education provided is to establish a provider-accreditation system in which providers who conform to the organization's quality standards are accredited. The standards often cover needs assessment, educational objectives, qualified instructors, and program evaluation. Examples:

Accrediting Council for Continuing Education and Training:  
[www.accet.org/associations/1689/files/accet%20Document%20202.pdf](http://www.accet.org/associations/1689/files/accet%20Document%20202.pdf)  
American Institute of Architects:  
[www.aia.org/ces2\\_template.cfm?pagename=ces%5fprovider%5fprogram](http://www.aia.org/ces2_template.cfm?pagename=ces%5fprovider%5fprogram)  
Commission on Dietetic Registration:  
[www.cdrnet.org/pdrcenter/draftcpepai.htm](http://www.cdrnet.org/pdrcenter/draftcpepai.htm)

expertise to create the actual educational content. So it partners with industry experts for that element of its program.

**Know your customers.** First ask, "Who are our customers?" Then ask, "What are their challenges, and how can we help solve them?" Just be sure to think broadly, since next-generation credentialing agencies realize that certificants are not their only customers.

Because the public is the ultimate customer for many organizations, you should consider ways to offer them services such as credential verification. Both CDR and CCI provide free verification from their websites. By simply entering a last name, city, and state, any consumer can learn whether someone is certified. This is particularly useful to employers who want to confirm the status of employees.

Other potential customers are educators, employers, and users of the certificant's services. For example, recognizing that quality education is a pillar of quality professionals, CDR is creating a curriculum-based certificate program for preceptors (professionals who educate and supervise dietetics interns in a practice rather than classroom setting). The certificate is a series of online modules incorporating education, assessment, and feedback for educators of the future dietetics workforce.

CDR also offers provider accreditation, a system that accredits continuing education providers who meet CDR quality criteria. For providers, it offers credibility and opportunities to market their continuing education courses. For CDR and its certificants, it assures that the field's major providers of continuing education are offering quality educational experiences. CCI has identified employers as a key customer of its products and services and is creating such items as employee-assessment tools, so that hospitals can create evidence-based employee orientations and targeted staff-development plans.

Your credentialing organization should almost always be collecting data—about your profession, your industry, or your own certificants. Through methods such as routine customer needs assessments, environmental

scans, and role- or industry-specific surveys, you must be diligent about maintaining an up-to-date awareness of the issues and trends that affect your current and prospective customers.

A true customer-centric approach requires more than a static market-research survey. It requires an ongoing relationship with certificants, noncertificants, and other stakeholders as well as a true understanding of the environment in which they work. Establishing and supporting a grassroots network of certificants is one way to stay connected with a broader customer base.

**Repurpose your assets.** Beyond offering traditional products such as study guides and practice tests, there are myriad ways your credentialing organization can expand its product and service portfolio with the data and intellectual capital you already possess.

As noted, credentialing agencies collect a lot of data. Be open to using the information in multiple ways, including ways not originally intended. For example, CCI conducted a competency-continuum survey through which staff members learned not only what competencies surgical nurses possess, but also at what point in their careers they acquired the competencies. The survey results enabled CCI to plot a nurse's skills on a novice-to-expert continuum, which laid the groundwork for a new employee-assessment tool. Now under development, this tool will enable nurse managers to target training and development dollars to areas of identified weakness rather than require the same education for everyone, regardless of individual competency level.

The data from this same competency-continuum study also demonstrated that there are some competencies for which all nurses, regardless of experience level, need ongoing development. This information provides CCI with a detailed roadmap on which clinical topics should be developed into learning and assessment tools.

Clearly and fully harvesting the information your research uncovers is a key factor in your ability to maximize the investment in your assets. Some additional ways to repurpose include the following.

**Evidence-based job descriptions.** The data from job-analysis surveys define a particular role. What you end up with is, at its core, a job description. By translating those data into true job descriptions, you can provide a valuable resource not only for your certificants but also, in many cases, for their employers, who value credible documentation of the scope and responsibilities of the various positions that exist in their environment. Sophisticated, evidence-based job descriptions that really meet a need may provide an entry into a new corporate market of the type many certification organizations find tough to penetrate.

**Competency-assessment tools.** The data from job analyses can also serve as the foundation for these kinds of tools, which can be used for individual self-assessment or employer group assessments to guide staff development.

**Site licenses/subscription services.** Like bulk discounts, these are sales strategies that can further build a business-to-business relationship between a credentialing organization and its certificants' employers. You could offer learning modules, practice tests, and employee assessments at discounts for bulk purchases, or you could sell them in packages that include a defined number of uses.

**Customized programming code.** Most credentialing agencies have spent thousands on a customized code for candidate tracking, recertification, or other databases. You can sell or license this code to other noncompeting organizations with similar needs.

## **Achieving Your Objectives**

The business of credentialing serves an important role in setting standards, protecting consumers, and developing the knowledge, skills, and abilities of professionals in an array of fields. The credentialing community has established traditions of quality, and it's vital to hold strong to these. However, you must also be willing to innovate. You need to align your strategy with key market issues and leverage your intellectual and tangible assets. This way, your credentialing agency will be able to achieve your business and mission objectives more fully—and be of greater service to the professionals it serves and the world around them.

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