

PROMOTING YOUR CREDENTIALS IN FARAWAY PLACES

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IN 2000, A SESSION AT THE ANNUAL EDUCATIONAL CONFERENCE OF THE NATIONAL ORGANIZATION FOR COMPETENCY ASSURANCE (NOCA), WASHINGTON, D.C., HELPED CATALYZE THE GLOBALISATION OF CREDENTIALS TO THE TOP OF THE U.S. CERTIFICATION COMMUNITY'S PRIORITY LIST. CO-PRESENTERS JEFFERSON GLASSIE, PARTNER, SHAW PITTMAN, LLC, WASHINGTON, D.C., AND JOANNE SCOTT, EXECUTIVE DIRECTOR, INTERNATIONAL BOARD OF LACTATION CONSULTANT EXAMINERS, FALLS CHURCH, VIRGINIA, USED THAT ORGANISATION'S CREDENTIAL EXPANSION INTO AUSTRALIA AS THE BASIS TO DISCUSS LEGAL ISSUES INVOLVED IN INTERNATIONAL CREDENTIALING.

In subsequent years, NOCA conducted seminars and gathered and analysed information on the international issues surrounding certification. This work resulted in a poll conducted in the summer of 2003 that further validated the need for certifying bodies to explore international opportunities. The poll indicated that approximately 66 percent of the 186 organisations that responded certified candidates in countries and regions such as Asia, Australia, Canada, Central America, Europe, and Mexico.

In fact, organisations that administer certification programs are in a unique position in the global marketplace to capitalise on new ventures and take advantage of new revenue sources. That's because credentials help certifying bodies establish a presence in countries where training and education are becoming top priorities in the private and government sectors. Certified public accountants, national certified counselors, and chartered financial analysts are only a few of the professional credentials that have wide international appeal. By establishing an international presence, certifying organisations help achieve their organisational missions, solidify their roles as experts in the industry (both nationally and internationally), develop new membership bases, and potentially benefit from new sources of revenue.

Clearly, international initiatives will continue to dominate the certification industry as the

demand for international programs and expertise increases. But how do organisations new to the globalisation race establish quality international programs that not only fulfil their organisational missions but also effectively use and contribute to their resources and overall strategic plans? A clear-cut answer to this question does not exist. Effective international programmes depend on variables the organisation is able to control (such as budget and staff resources) and those it is unable to control (such as the business environment and global politics) as well as on sound strategies for program development. And while globalisation may be the watchword of the certification industry, as new international markets emerge and certification programs are rushed to market, organisations face the pitfalls inherent in premature projects and incomplete planning. Fortunately, a better starting point is found in the knowledge and lessons learned of internationally experienced organisations representing different fields, membership sizes, operating budgets, and missions or visions. Following are some of their recommended strategies for developing effective international certification programs.

BE PATIENT

Expanding certification programs into foreign markets is a complex undertaking that takes patience--and often requires that organisations revisit the basics of their credentialing programs.

Rely on established standards. The National Board for Respiratory Care, Lenexa, Kansas, established its credential (certified respiratory therapist, or CRT) based on the Standards for the Accreditation of Certification Programs developed by the National Commission for Certifying Agencies (NCCA), NOCA's accrediting body. When an international group approached NBRC to export the credential, the leadership used those standards--which focus on ensuring that policies and procedures meet current industry standards and are psychometrically sound--as a guide to formulate the correct strategy.

Although the NBRC board of directors had discussed possible international projects, it was the strength of their credential and brand that brought international groups to them. 'We did not push the NBRC credential into a new market or assume the position of industry expert,' says Gary Smith, CEO and executive director of NBRC, immediate past-president of NOCA, and former NCCA chair. 'Our role was educating others on the evolution of certification practices for our particular industry in the United States.'

More than two years after talks began, NBRC has helped to create a coalition of seven Latin American countries that will administer an exam tailored to the respiratory care industry in that region. To educate the new coalition on NBRC's certification practices, Smith and other NBRC officials spent countless hours on consultations, negotiations, and research, while benefiting from the combined expertise of psychometricians, local health care professionals, cultural and subject-matter experts, and others to reach this point. According to Smith, the length and detail of the project was 'well worth' the results: a psychometrically sound and effective exam. Establish criteria for expansion. In 1993, leaders of the National Institute for Automotive Service Excellence (ASE), Leesburg, Virginia, also found themselves investigating options for interna-

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tional expansion of their ASE-certified technician's credential. They embarked on the first of three international testing attempts in Canada. Bill Kersten, ASE senior vice president of operations and NOCA president-elect, believes that the incremental plan eased board members' reservations regarding expansion.

'When we were initially approached by members of the Canadian automotive industry, we quickly worked toward administering one series of ASE's 47 exams,' Kersten explains. 'Unfortunately, we learned too late in the process that our Canadian partners did not have full cooperation from each provincial government--a key set of stakeholders--and the project suffered.'

Whether an organisation is approached or initiates the project, first steps to launching successful international programs should not be rushed and should include 1) evaluation of current organisational resources and 2) full disclosure of the resources needed for a successful venture. After its experience in Canada, ASE established a new globalisation model that included

- + working with a coalition of stakeholders (for ASE these stakeholders include automobile dealer associations, vehicle manufacturers, government representatives, and service technician associations);
- + defining with the volunteer leadership the dedication of financial resources and potential revenue involved in expansion;
- + evaluating the staff resources required to establish and administer the program; and
- + determining what is a sound and viable venture.

Deliberately explore expansion. Similar to NBRC and ASE, the National Board for Certified Counselors, Greensboro, North Carolina, was ap-

proached by international groups before it began its currently active foreign agenda. However, unlike the groups profiled earlier, NBCC has taken a deliberate approach to international expansion by fostering an organisational environment open to globalisation. It has acknowledged the sensitive issues that organisations encounter in international markets by electing a diverse board that regularly investigates international opportunities.

'NBCC's board of directors is adventurous and actively participates in international conferences, joins staff on trips around the globe, and meets with interested parties,' says Susan Eubanks, associate executive director of NBCC and NOCA president. 'The nature of counselling and the openness of our board to outside opportunities make it considerably easier for NBCC to remain true to its mission and still explore and execute expansion.' As a result of the group's efforts, countries such as China, Hong Kong, Japan, Mexico, New Zealand, Romania, and others in Africa and South America use NBCC standards for the national certified counsellor and the global career development facilitator programs as a basis for their own programs.

Using the board of directors to assess the international landscape can determine legitimate leads and help establish a network with potential international partners. However, launching international programs before educating yourself, your staff, and leadership on the variables involved drastically reduces your opportunity for success and makes international expansion risky.

REVIEW FINANCIAL RISKS

The National Institute for Automotive Service Excellence learned from its bumpy attempt in Canada that an international credential does not guarantee a lucrative source of revenue. The association now bases the decision to ap-

prove or disapprove a request to export their program to other countries on these additional criteria: 1) their service industry will benefit from the ASE program; 2) existing ASE staff will be able to handle the additional tasks related to developing a new program administered outside the United States--and in another language; and 3) ASE will be able to show at least some financial gain for its efforts through a licensing agreement.

Certifying organisations have different operational and financial models open to them when considering international expansion, including but not limited to

- + **Licensing.** The certifying organisation signs a licensing agreement for its examination allowing a foreign entity to administer the exam.
- + **Coalition.** The certifying organisation works with aligned international organisations to create a coalition or federation that implements the certification program.
- + **Program retention.** The certifying body maintains all aspects of the certification program as a U.S.-based operation.

The solution for ASE and other similar groups has been to help establish a foreign-based, financially sound entity and then license the certification examination to that entity. In 1996, with the assistance of major industry constituent groups, ASE established ASE-Brazil to manage the operation of its Brazilian program. ASE licensed its exam to the organisation and worked with cultural and subject-matter experts to localize the exam. ASE-Brazil handles all exam administration logistics.

According to Kersten, the creation of the licensed organisation helped ASE avoid the pitfalls that it experienced earlier when trying to administer the examination from its domestic headquarters in Leesburg, Virginia. For example, language barriers and the fact that candidates work with different automobiles are no longer problems. The licensing option also draws less on the current employees and operational budget, since ASE-Brazil is staffed and run independently from ASE.

The National Board for Respiratory Care established a similar licensed entity in Latin America, allowing Gary Smith's group leeway to conduct

international business without overextending the resources needed to provide support for U.S. certificants. Establishing licensed entities can not only help preserve the financial security of the organisation, but also it may eliminate the perception of an aggressive U.S. machine pushing its product to an unsuspecting audience, while opening the door for new, international organisations to build on existing experiences and expertise.

CONSIDER CULTURAL CONSEQUENCES

A common pitfall of globalisation is not fully understanding the culture of the target country or region. This often translates into a failure to localize the exam and program to the education and skill levels, official language, and business environment of the targeted country. Hence, as a certifying body examines its own resources to determine the viability of a global opportunity, it must also research the culture and the profession's place in the culture.

The National Commission for Certifying Agencies requires that organisations applying for third-party accreditation of their certification programs conduct a thorough job analysis to determine the core competencies that the certification requires and the education and training required to achieve an acceptable knowledge level for each of the job's tasks. When the National Board of Respiratory Care and its partnering Latin American coalition conducted a job analysis of respiratory therapists in the region, they determined that the candidates' education level did not match that of U.S. candidates due to the lack of continuing education and training.

'It was simply not fair to test candidates using an exam [designed for individuals with better training opportunities] without consulting content experts in the region to adapt the exam to the local skill level,' Smith says.

Subject-matter or content experts play an important role in developing and administering exams internationally. NBRC (an allied health organisation) used content experts and translators to ensure that the exam tested the skills needed to perform the job in that country based mostly on the current education and training level.

The automotive group's content experts focused less on the training candidates received and more on the specifics of the vehicle fleet. And before employing experts to review the translation of the exam items, the organisation used them to determine if U.S. exams could be adapted to fit the target country's fleet or if new tests had to be developed from scratch.

The old saying, 'The devil is in the details,' applies nicely to globalisation. International projects can quickly derail if the parties involved do not pay attention to cultural details, such as understanding the local economy or conducting business on an international clock. Based on location, nine-to-five may not work; 24-hour availability may be necessary.

RESIST MODELING UNIQUE PROGRAMS

The credentialing industry is constantly reinventing itself. A strategic plan may come together successfully for one organisation and prove ineffective or even destructive for another. Globalisation of credentialing programs is a perfect example. The process of establishing a licensed entity and employing content experts to localize and translate an exam worked for several of the organisations in this article, but for the Association for Investment Management and Research, Charlottesville, Virginia, globalisation meant controlling as many factors as possible to preserve the value and strength of the chartered financial analyst (CFA) designation.

AIMR administers nearly 100,000 exams annually in 83 countries. All exams are given in English, all logistics of the exam administration and development are staffed at AIMR headquarters, and all content aspects of the credential are identical worldwide. Many association leaders would be delighted if their international certification programs could mirror their current domestic programs as AIMR's does. However, they shouldn't count on it. According to Jan Squires, vice president of examination development for the CFA program, internationalization of AIMR's designation may be unique because of the industry it serves.

Squires says, 'The investment profession is increasingly global and based on international

markets where English is the predominant language and the skills required to conduct business successfully are not geocentric.' She adds, 'International financial epicentres such as Zurich, London, and Singapore logically became some of the first international exam sites. From those beginnings, AIMR leadership initiated a more formal globalisation business model that preserved those fundamentals of the U.S. exam and designation that represented the knowledge and skills necessary for an analyst to work anywhere on the globe. At the same time, the model systematically built non-U.S. perspectives into all the key CFA program processes.'

DON'T EXPECT A SILVER BULLET

Clearly, some of the best minds in the certification business are addressing globalisation--and doing it in different ways. In an ideal world, certifying bodies would have access to the exact formula needed to successfully globalise their program. Instead, a dominant theme has emerged among certification programs that have already made or are making the leap to international credentialing: Determine the value of your program internationally the same way you determined its value domestically.

Whether establishing a certification program at home or abroad, the same motivating factors apply and can be adjusted according to the country. To determine program viability, conduct detailed analyses and have discussions with all relevant stakeholders. This exercise might lead to the conclusion that the certification is beneficial to the country, individual, or industry; it provides value; and it promotes the mission and vision of the industry or organisation. If it does not, you may not be ready to expand or international expansion may not be right for your program at all.

At the end of the day, while analyzing the landscape and evaluating the experience of others sometimes creates more questions than answers, such investigation may result in ideas that will strengthen your existing program. And it may even lead you to the conclusion that your organisation is, in fact, ready to take its credentialing program on a long-distance journey.

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