WILD About Testing

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A newsletter aimed at certification professionals interested in continuously improving the certification experience for their certificants and other stakeholders (employers or government agencies that might use the certificate).

From the Editor

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Welcome to the fourth issue (already) of **WILD about Testing**. I am delighted to report that during the four months of producing this e-zine I've learned three things. **First**, people really like and want information on improving quality in testing. **Second**, my colleagues are generous in their willingness to contribute ideas and content through interviews (for example, thank you to Roger Brauer, Susan Case, Catherine Davis, and Liz Koch who contributed ideas for this issue.) **Third**, and most importantly, people love the idea of the constant input area (right on my website at **www.wildandassociates.com**) 24/7 to let me know what is on their mind and what they want me to write about next.

As with earlier issues, content of the newsletter has been shaped by reader feedback. (Anyone who would like to provide additional feedback may go to **www.wildandassociates.com** to help with the design of future issues.)

One of the top requests for continuous improvement tips from our readers was setting priorities for continuous improvement. In earlier issues we talked about identifying areas of continuous improvement – internal audits, evaluating costs of poor quality, and customer feedback. This month's tip will talk about **setting priorities**.

The Benchmarking Code of Conduct will be the focus of this month's benchmarking article. We will also talk about the use of task forces for quality improvement.

Enjoy the newsletter and share it with your colleagues. Please use the "Forward to a Friend" link in and help me reach out and find everyone who can benefit from years of great experience, which I am delighted to share.

Continuous Improvement Tips:

Setting Priorities for Continuous Improvement: The Selection Matrix

As the leader of a certification body you now have collected a lot of information including customer feedback, information on cost of poor quality, including feedback from audits. You need to identify the priority project. The selection matrix is a tool for identifying the priority projects.

List the projects that are proposed based on the data.

The first step is to identify the possible projects. (They go into the left hand column of the sample matrix.) You will need a description of each project. Not

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Continuous Improvement Tips *(Continued from Page 1)*

only do you need the purpose, but you need to know what areas (people) need to be involved.

Determine your criteria for project selection. Common criteria include how closely the initiative is related to the organizations current goals, the cost savings as a result of the project, the likelihood the project will improve customer satisfaction or customer service, etc.

Decide who will be involved in setting the criteria. Usually your leadership team is involved in setting priorities for selection of projects. It is important to involve all affected areas in setting the criteria. You can imagine that people who work in the call center may identify different criteria than the psychometrician or your director of marketing. You might have a leadership team develop the criteria and ask staff for comments or suggestions before implementation.

An example of a selection matrix. The table below provides an example of a selection matrix comparing three projects and the criteria are defined below the table. The criteria are essentially:

- Reducing customer complaints,
- Reducing operational costs, and
- Reducing cycle time for customer services.

Each criterion is rated based on the scale provided and the criteria are multiplied to provide the weighted score in the fifth column. In this example, the project to decrease the time for processing checks is weighted the highest (5 X 2 X 5) because it receives a high score on both the first and third criteria.

It will reduce the number of customers complaints (customers call to see why they have not received a response after submitting their checks) and it is highly related to the corporate priority of reducing cycle time for customer interactions.

A Caution
The leadership team should critically analyze the results of the selection matrix before making a final decision. Conflicting resource needs of the selected projects should be considered.

For example, the two projects with the highest priority may both require significant involvement from your information technology staff. The information technology staff might have sufficient time to support one, but not both projects.

Or the environment may have changed since the criteria were identified. If your biggest state client suddenly passes a law requiring scores be reported within 45 days, then the priority of the projects will likely change.

The selection matrix is a method of quantifying decision making but it should never be used as a substitute for common sense.

PROJECT	CRITERIA			WEIGHTED SCORE
	1	2	3	
(1) Reduce the time for mailing pass/fail results from 60 days to 45 days	3	2	5	30
(2) Reduce the cost for processing applications by 25%	1	3	2	6
(3) Decrease the time for processing checks from 3 weeks to 1 week	5	2	5	50

Criteria:

1. Will reduce the number of customer complaints either in writing or by telephone. 1= little or no impact (less than 5% reduction); 2=5 to 9% reduction in letters or calls; 3=10 to 14% reduction in letters or calls; 4=15 to 19% reduction in letters or calls; 5=more than 20% reduction in calls.

2. Reduce the overall operational costs. 1=little or no impact; 2=3 to 5%; 3=6 to 8%; 4=9 to 12%; or 5=more than 12% savings.

3. Relates to corporate goal to reduce the cycle time for customer services. 1= little or no relationship; 3=some relationship; 5=high relationship.

Benchmarking: The Benchmarking Code of Conduct

Previous benchmarking columns have covered identifying the goals of your benchmarking study, identifying your benchmarking team and conducting secondary benchmarking, and selecting benchmarking partners. Just like you ask your item writers and committee members to sign confidentiality agreements, you and your benchmarking partners will want to have an agreement on the sharing of benchmarking information.

The APQC is a nonprofit organization that sponsors consortium benchmarking studies for their members. ***The Benchmarking Code of Conduct: Guidelines and Ethics for Benchmarkers*** (2004) is available free at **www.apqc.org** (search the knowledge database). This document is an excellent resource for organizations wishing to conduct benchmarking studies.

As APQC suggests, "adherence to this Code will contribute to efficient, effective and ethical benchmarking." Often, organizations request that all participants in a benchmarking study sign an agreement to abide by the ***Benchmarking Code of Conduct.***

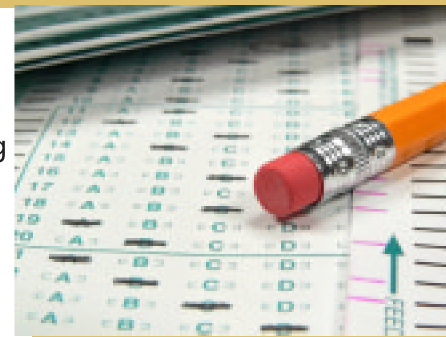
There are eight areas of the benchmarking code of conduct:

- **LEGALITY**
  Avoid any actions that suggest restraint of trade, breach of security, or obtaining trade secrets. Don't share the results of the study in a way that would violate anonymity.

- **EXCHANGE**
  Don't ask for information you wouldn't be willing to provide to your benchmarking partner, be honest with the information you exchange and abide by schedules and agreements.

- **CONFIDENTIALITY**
  A company's participation in benchmarking is confidential as are the results of a benchmarking study. Obtain permission prior to sharing information.

- **USE**
  Contact lists should be used only for the benchmarking study and information obtained through benchmarking should be used for only for the agreed upon purposes.



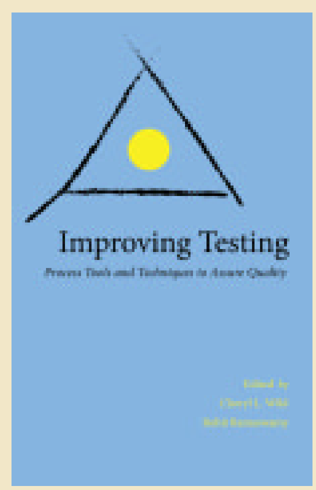
- **CONTACT**
  Respect your benchmarking partners and agree on procedures in advance. Maintain confidentiality of contact information and obtain agreement before sharing a contacts name for any reason.

- **PREPARATION**
  Provide your benchmarking partner with a questionnaire and agenda before the meeting and respect your partner's time by being fully prepared for meetings.

- **COMPLETION**
  Follow through on your commitments.

- **UNDERSTANDING AND ACTION**
  Understand how your benchmarking partner would like to be treated and how he or she would like to have their information shared and behave consistently with this understanding.

Benchmarking is an ethical and systematic method of learning from our colleagues. **The Code of Conduct is an excellent tool to make sure everyone in a benchmarking partnership understands and agrees to the rules of the information exchange.**



Technical Task Force

I just finished facilitating a task force meeting for a certifying body in the financial arena. Nine high level measurement professionals from best practice certificating organizations and related organizations – individuals with expertise in psychometrics, score reporting, certification operations, certification management, and vendor management convened for a one and a half day intensive meeting.

The benefit to the convening organization was tremendous – they have a report and recommendations that, when implemented, will make them a best in class organization.

More important than the specific recommendations, however, is the momentum that such a task force can create with your volunteer board and committees.

Volunteer committees are subject matter experts – in the field of your certification (finance, medicine, law, auto mechanics, food service, etc.).

Members of the examination committee participated in the task force and learned that other organizations faced similar issues, such as:

- Conflict of interest for test committee members,
- How to recruit volunteer item writers and committee members,
- What are effective item types, and appropriate roles for volunteers, certification staff and the psychometric vendor.

The task force results provide the certification organization with comparisons of what is considered best practice by multiple other organizations.

Both members of the task force and the convening organization benefit.

Why Articulate the Purpose of Your Certification?

What is the purpose of your certification?

This is such an innocent, simple sounding question, yet it isn't always easy to find in published literature. Many web sites describe the content of the examination without generally stating its purpose.

What do I mean by purpose?

Merriam Webster's Collegiate Dictionary (10th Edition) gives one definition of purpose as:

"something set up as an object or end to be attained: intention"

To define the purpose of the certification program, then, the purpose needs to include the objective of using the program. Many certification programs have the purpose of identifying applicants who have a minimum knowledge of a specific field.

However, other programs may have the purpose of identifying professionals with specialized expertise.

Catherine Davis, Director of Global Research and Test Administration at CGFNS International indicated that their purpose statement, although not labeled as such, is published on their web site, in marketing and promotional material, and in the information provided to candidates.

Their purpose statement from their web site (**http://www.cgfns.org/sections/programs/cp/**) is as follows:

> **The CGFNS Certification Program is designed specifically for first-level, general (registered) nurses educated outside the United States who are eligible to practice as registered nurses in the United States. The program is comprised of three parts:**
>
> **(1) A credentials review, which includes an evaluation of secondary and nursing education, registration and licensure;**

(2) The CGFNS Qualifying Exam℠ a test of nursing knowledge offered three to four times a year in over 50 test sites worldwide, also satisfies one of the immigration requirements for securing an occupational visa to work in the United States; and

(3) An English language proficiency examination.

The CGFNS Certification Program Certificate is required of internationally educated registered nurses by a majority of U.S. states in order to take the NCLEX-RNR licensure examination.

Purpose Statement

As an example of a purpose statement, Liz Koch, Chief Operating Officer of the Dental Assisting National Board, Inc., shared the following purpose statement for their Infection Control Examination (ICE):

> **The test is designed to evaluate a candidate's minimum competency level of knowledge, skills and abilities to discern proficiency in infection control, including Occupational Safety and Health Administration (OSHA) requirements, as well as recommendations from the Centers of Disease Control and Prevention (CDC) and the American Dental Association (ADA) for personnel performing procedures in the dental office.**
>
> **Earning a certificate of competency in ICE demonstrates that the individual meets the national standard for knowledge.**
>
> **Because certification is voluntary, the choice to take the exam exhibits pride in the profession, the desire to be recognized for mastery of infection control, as well as an ongoing commitment to quality patient care.**

Ms. Koch indicated that this purpose statement is included in their technical reports and suggested that a clear purpose statement had three important uses.

- First it helps state agencies and educators understand the intended purpose of the certification.
- Second it helps prevent misuse of the examination. State agencies sometimes want to use the examination for a purpose other than the intended use, so a clear purpose statement is important.
- Finally, the purpose statement also helps you sell your exam. It gives a preview of what is in the examination and sets expectation. The purpose statement can intrigue potential users and encourage them to read further.

Susan M. Case and Beth E. Donahue (***Journal of Legal Education***, September, 2008, p. 4) indicate that:

In the case of the Multistate Bar Examination, the purpose of the exam is to assess the examinees' readiness, in terms of applying fundamental legal principles to fact scenarios, for the beginning practice of law.

Case and Donahue indicate that the primary consideration is selecting the question that is relevant to the purpose of giving the examination (they are talking about scenarios or vignettes, but it could be the stem of any question) .

The purpose statement of an examination is fundamental to the design of the test. It should be a primary consideration in the design and implementation of the job/task/practice analysis and the development of the exam blue print.

It influences the selection of participants in cut score studies and the setting of cut scores. It influences validity studies of the examination.

Speaking of benchmarking – we all learn from studying examples from other organizations. **If you have a purpose statement that you are willing to share with other readers, or additional ideas for the use of a purpose statement, please send them to me at cheryl@wildandassociates.com.**

In The News

A new blog is available and may be of interest to some readers:

http://advancingthenonprofit.blogspot.com

It is aimed at Executive Directors of nonprofit organizations – which includes many certification bodies. Please join us in discussions.