



Focusing on Credentialing Outcomes with J. David M. Rozsa

Leading Learning Podcast Transcript for Episode 305

David Rozsa (00:00):

And I think that, ultimately, is where the credentialing industry will have to go, rather than focus on whether somebody has knowledge or whether they have previously done certain things within the context of their work—knowledge-based or competency-based credentialing—to really focusing on the outcomes piece of it.

Celisa Steele (00:24):

I'm Celisa Steele.

Jeff Cobb (00:31):

I'm Jeff Cobb, and this is the Leading Learning Podcast. Welcome to episode 305, which features a conversation with J. David M. Rozsa. David is CEO of Metacred, an association management company, or AMC, dedicated to developing, managing, and growing the best credentialing programs in the world by bringing the best credentialing practices, staff, and vendors within the reach of all organizations. Metacred acts as the certification or accreditation department for its clients, which include both not-for-profit associations and for-profit companies. As you might guess, David and Celisa focus their conversation on credentialing. They talk about what goes into getting a credential off the ground, the current state of credentialing, the threat that the rejection of expertise poses, the importance of involving stakeholders beyond potential applicants, the necessity of marketing, and how to demonstrate the impact of credentials. It's a good conversation, chockfull of tips and insights that will benefit learning businesses. David and Celisa spoke in March 2022.

Celisa Steele (01:49):

So I know in your e-mail signature, I think there are at least three certifications listed. You're a CAE, a Certified Association Executive; an ACA, an Advanced Certification Administrator; and an ICE-CCP, so an Institute of Credentialing Excellence Certified Credentialing Professional. And then I know from looking at your LinkedIn profile that you hold other credentials as well. So I think it's very clear that you are walking the walk when it comes to credentials. And so would you just talk a little bit about how you describe the role of and the value of credentials?

David Rozsa (02:26):

Absolutely. And I appreciate you recognizing that, in addition to my professional credentials, I also am scuba-certified up to Rescue Diver currently—looking for that Master Scuba Diver certification next. But, listen, credentials advance consumer safety and protection. They advance

*This transcript accompanies the episode of the Leading Learning Podcast
available at www.leadinglearning.com/episode305.*

stakeholder risk management of outcomes in practice and workforce development gaps in the labor market and, ultimately, economic development. So the value of credentials is really to provide third-party validation of competencies as a risk management tool for consumers, for employers, and other stakeholders, as well as a way for workers themselves to improve their chances of earning higher compensation.

Celisa Steele (03:15):

And so I'm guessing that you've been part of getting quite a few credentialing programs started and off the ground. And I'm sure that each is distinct in some ways, but would you be able to talk through at a high level what goes into getting a successful credential started?

David Rozsa (03:33):

Of course, it has to start with a needs analysis, whether formal or informal, like any professional development product. And once you've determined that there is significant demand for third-party validation of competencies for an occupational role, that there's also a large enough universe of potential applicants who earn enough to invest in their professional growth that the certification program will be able to charge exam fees sufficient to be a net-positive revenue center for the organization, then you can really dive into program development. So next you will want to identify all of the stakeholder groups that have an interest in the occupation to be credentialed. That includes potential applicants themselves, but it also includes their employers, their customers, or patients, business partners, suppliers, and vendors up and down the supply chain, related advocacy groups, government regulatory authorities, et cetera. So once you've figured out who all the stakeholder groups are, you figure out what each of those groups would value in a credential for this profession.

David Rozsa (04:46):

And that then informs your definition of the credential program purpose, which in turn drives all other decisions about developing the new program. Specifically for a personnel certification program, as opposed to a certificate program, a microcredential, or an accreditation, the next step for personnel certification is to conduct a formal job analysis to define the knowledge and skills that are necessary for competent practice of the certified occupational role, and that job analysis then determines the topics for the exam and the period for recertification. Combined with your program purpose, you can then set the eligibility requirements and the recertification standards.

David Rozsa (05:36):

So next up you're going to train subject matter experts in that particular occupational role as item writers and have them draft exam questions, then have a diverse group of subject matter experts serve as your exam committee and refine those draft questions. You then data-test the exam, fix or retire any poor performing items, construct your final exam forms, and set the passing point through a formal test score study. And, throughout this whole process, of course, you market and promote the new program to the various segmented audiences of stakeholders to encourage uptake.

Celisa Steele (06:14):

Wow. Well, there's a lot going on there. Thank you, though, for that overview of the process.

David Rozsa (06:20):

You said “top-level.” I could get into detail.

Celisa Steele (06:23):

Yeah, absolutely. Well, no, already there, I can imagine how complicated it can get and get quickly. I mean, just the sheer number of stakeholders, identifying them, convening them, doing all of that sounds like a tremendous amount of work but also very important work so that you get all those perspectives represented, and then you also have them as potential avenues for disseminating the credential once it is off the ground.

David Rozsa (06:52):

Exactly. And it is very complicated. It’s complex, and so are taxes. Right? People’s eyes tend to glaze over. They either get very bored or a little scared when you talk about taxes or certification. And both of these are just large complex sets of rules that if you’re really passionate about them are straightforward and easy to do.

Celisa Steele (07:18):

Again, you’ve been involved in a lot of different programs with a lot of different organizations. Are there common missteps or mistakes, things that organizations tend to get wrong about credentialing or maybe overlook about trying to get started with a credential, whether that’s a certification or something else?

David Rozsa (07:38):

I think the biggest myth is failing to consider the needs of stakeholders other than potential applicants. That is very common. I would say it’s a small minority of certification programs, for example, that involved employers in the job analysis or customers or patients. So, when you only think about the universe of potential applicants when you’re building the credential program, you end up with a program that doesn’t really align with what employers and customers and the other stakeholder groups care about. So then the practitioners don’t have external pressures on them to earn the certification. You don’t have employers requiring the certification, et cetera, and, ultimately, that results in lower application rates, smaller profitability, if any, and often the program eventually fails. The ASAE Foundation’s ForesightWorks research, especially the action briefs on Education 3.0 and microlearning offer some great insights into aligning credentials with workforce development needs.

Celisa Steele (08:52):

Well, thanks for mentioning those resources, and we’ll make sure that we link to some of those in the show notes that will accompany this episode. Because it’s so important to work with employers and other stakeholders, why do you think it doesn’t happen all the time? Is it just a matter of insufficient time and energy?

David Rozsa (09:13):

I think part of it is insufficient time and energy, and part of it is that it just isn’t widely considered. And I think there are a lot of people who are working in credentialing and professional development more broadly who aren’t really focused on the marketing side of it, the business side of it. And they can be great subject matter experts in the legal defensibility or quality of the credentialing program, but, if the business aspect of it isn’t considered, it may not last long, and it certainly won’t be one of the cash centers of the organization. So I think it’s largely a matter of it feeling overwhelming. Right? “Oh, man. Now I’ve got to think about ten

different stakeholder groups and find representatives of each group that can tell me what they care about, and all of this at the front end, before we even start the job analysis survey?" And building a program that aligns with those needs of the different stakeholder groups takes a little bit more work but tends to get much greater support and be much more successful.

Celisa Steele (10:37):

Is there any sort of typical timeline from the conception phase around the idea for a credential to walking through all those steps that you laid out at a high level?

David Rozsa (10:49):

Yeah, I've seen it personally take as short as four months—which is incredible—and as long as four years, roughly three and a half. And it really depends on the willingness of the organization to invest both money and time and the volunteer leaders', the subject matter experts' availability to do meetings. So we had an organization come to us, and one of the large IT companies had been certifying the salespeople who sold and configured their high-level, off-the-shelf computer application. And then that IT company decided they weren't going to be in the certification business anymore, leaving a large population of people who were already certified and those salespeople and configuring installers really wanting that credential. So they got together and informed an association, but they didn't really know certification. So they approached our AMC and said, "Can you help us out? This IT company is going to sunset its certifications in four months and has a large annual user group conference. We'd love to launch the new certifications (three of them, by the way) in four months."

David Rozsa (12:22):

And so we said, okay, and it's the old improv rule. You never say, "No," you say, "Yes, and." Yes, and do you have subject matter experts who are going to be available for daily meetings for the next four months? And that's what we did. And we successfully launched in four months, having gone through the formal process with the job analysis survey construction and survey being out there and everything. So that was a big win. On the other hand, we've had organizations where the volunteer leaders are not that engaged and, "Oh, the summer months are not available to me" and things like this, and that stretches things out.

Celisa Steele (13:06):

And so, if you just think about the current moment and where we are as a society, how would you characterize the current state of credentialing? What do you see as the big opportunities or the big threats?

David Rozsa (13:22):

There are significant opportunities for globalization and localization, as well as microcredentialing and developing credentialing ecosystems that provide learning pathways aligned with the needs of employers and consumers again. So you have, for example, microcredentials leading up to larger certificates that ultimately result in a certification at a certain point with then regional endorsement modules and specialty post-certification credentials. That's the type of ecosystem that I'm referring to and I think really aligns well with the game theory approach to learning that has been proven to be pretty successful recently. The largest threats to credentialing, I would say, are the undercurrent of anti-intellectualism. So there's actually one of those ASAE Foundation ForesightWorks action briefs on the rejection of

expertise. And I think that's a growing threat, as well as the economic recession, both of which cause a reduction in individuals' investment in their own skills and growth.

Celisa Steele (14:38):

Fascinating, that rejection of expertise and anti-intellectualism. I will look forward to digging in a little bit more. You've been involved in credentialing for a long time. How have you seen credentialing evolve over the course of your career? And I'm guessing that there've been some recent changes, perhaps prompted by COVID, but, beyond that, any other sort of trends that you've noticed unfold during your years working?

David Rozsa (15:03):

Interesting. Yeah. So it's been a couple decades since I've been involved with certification and accreditation, and I've seen a marked improvement in legal defensibility across all credentialing programs, so certifying organizations investing in having a rational basis for every program development decision, such as the job analyses and cut-score studies. There's also been significant international expansion and just international collaboration across credentials. More and more organizations are recognizing the need to align their professional development products with the needs of employers and other stakeholders. And, of course, more recently, one of the effects or impacts of the COVID-19 pandemic has been the acceleration of adoption of live remote proctoring for certification exam administration, which previously had been resisted by the organizations that accredit personnel certification programs for many years because of exam security concerns, but, due to the pandemic, it was necessitated. And the uptick in application rates, once we launched live remote proctoring as an option for certification customers, was very significant.

David Rozsa (16:30):

So during 2020, we actually, for the largest association whose certification program we manage, their volume of applications in 2020 ended up being almost exactly the same as it had been in 2019, and most of that was from a big surge that we got when we announced the availability of live remote proctored exams.

Celisa Steele (16:59):

And is that live remote proctoring something that will be able to be carried forward, or were some of the credentialing bodies a little more, I guess, only making exceptions for a certain period of time, and so it's unclear whether that might remain in place?

David Rozsa (17:12):

So certainly when the Institute for Credentialing Excellence, NCCA—that's the body that accredits personnel certification programs along with ANSI ISO/IEC 17024—when ICE's NCCA came out with its initial acceptance of live remote proctoring in the context of the COVID-19 pandemic, it was intended to be temporary, but, due to pressure from certifying organizations that are the members of ICE, that has been made permanent. So I think the intent for both some certifying organizations and ICE/NCCA was that it was going to be temporary, but the adoption, the convenience to the customer, I think has outweighed those security concerns. And, ultimately, those security concerns are legitimate. An exam that is administered at a brick-and-mortar test center with a proctor actually watching the candidate in a controlled environment is more secure than a live remotely proctored exam where it's the candidate's environment, and you're viewing the security of that room through remote viewing

technologies like Web cams. So the exam security concerns are real and legitimate, but, ultimately, I think customer convenience has won that argument.

Celisa Steele (18:49):

Are there any innovative approaches or really successful credentialing program examples that you can share with us?

David Rozsa (18:59):

I think one of the more interesting recent trends is trying to assess an individual's soft skills. We are researching whether there is an objective way to do this, and we believe that employers and customers would really appreciate the value of a certification that validates that a practitioner is, what have you—innovative, collaborative, creative, et cetera. We are also measuring the impact of credentials on actual outcomes in practice to ensure that the credentials have real-world value.

David Rozsa (19:31):

So we are asking applicants to tell us about their current outcomes in practice, using whatever metrics their stakeholders would care about for that particular profession, at the point of application and then again at the point of recertification, so that we can determine whether there's a correlation between somebody earning the credential and all of the study and preparation that goes into passing the exam, as well as meeting the eligibility requirements and then subsequently doing all of the continuing professional development that goes into the periodic recertification, on the one hand, and how well they're performing on the job in ways that matter to their stakeholders, on the other hand.

David Rozsa (20:18):

And so far we've seen significant correlation. And I think that ultimately is where the credentialing industry will have to go, rather than focus on whether somebody has knowledge or whether they have previously done certain things within the context of their work—knowledge-based or competency-based credentialing—to really focusing on the outcomes piece of it.

Celisa Steele (20:48):

I think that's fascinating. And, yes, it would be a lovely nut to crack, wouldn't it? To be able to say, definitely, look at these. These are the outcomes that those who are served by these credential holders, these are sort of the benefits that they're able to realize because of that. How have you found participation in your work to get that information about outcomes that those credential holders are seeing? Is that something that you ask them to voluntarily participate in? Is it something that you bake into some of their recertification requirements? How are you seeing participation levels, and what are you doing to incentivize those credential-holders to share that outcomes data with you?

David Rozsa (21:27):

That's a great question. So I believe the largest incentive is to make something mandatory, and so we have baked it in not only at the points of recertification, but at the point of application for initial certification as well. And it's actually twofold. It's both outcomes in practice, and it's salary. So we do require that applicants for most of our managed credentialing programs tell us what their salary is, and we have various ways of collecting the data on their outcomes in

practice, whether it's self-reported by them or reported by employers or customers. And then again at the points of recertification. So they can't actually submit an application for initial certification or an application for recertification without completing that data. So the participation rate is 100 percent, I'm happy to report.

David Rozsa (22:23):

And I will say that it did not negatively impact any application rate or recertification rate when we introduced those requirements. So we were a bit concerned with, oh, if people have to report their salary, are they going to decide not to apply? Or the extra work in getting their employer to validate what their current performance levels are on the job, they may be a little reticent to do that. Is this going to negatively impact application rates? But we didn't find that at all.

Celisa Steele (22:55):

Well, great. Wonderful. Thanks for sharing that. And I was going to ask about the economic incentive for the credential-seeker, so I'm glad that you brought up the salary data that you're also tracking.

David Rozsa (23:07):

Yeah. Because we want to be able, from a marketing perspective, to make that argument as well. So not only to the employers and customers, et cetera, that, "Hey, look, somebody earning this credential actually improves their outcomes in practice," but also, to the potential applicants as the primary stakeholder group to say, "You know, people who earn this credential on average earn this much compared to the average salary for your profession, which is only this much."

Celisa Steele (23:35):

What high-level advice do you have for learning businesses to help them get their credential programs right? I realize that's a big question, wide open. So, if you want, feel free to tailor that advice. Maybe you might say one thing to a learning business looking to launch its first credential versus an organization that has a lot of credentials under its belt and some certificate programs or certification already on offer, and they might be in a different place. You might have slightly different advice for them.

David Rozsa (24:06):

For a new program, I would suggest that the organization be really aware that certification program development is an expensive proposition, especially due to the legal defensibility requirement of having to conduct that job analysis. And ongoing management of the program also requires specialized expertise that is in short supply. Certification directors tend to be very well compensated, as do psychometricians. And investing in marketing is critical. I've seen a lot of credentialing programs that were high-quality, really well-developed, engaged all different stakeholder groups and budgeted zero for marketing, thinking, "If you build it, they will come." And, five years later, those programs get eliminated from the association's activities. And investing in marketing is necessary.

David Rozsa (25:05):

The partnering with other organizations to help share investment costs or management workload is a good approach. And, ultimately, listen, remember to have a rational basis for every decision, maintain the firewall between certification and education—and that could be its own podcast—and follow your own policies consistently. Do what you say you're going to do.

Hopefully your program's purpose is focused on consumer protection and workforce development needs. So sleep well, knowing that you are making the world a better place.

Celisa Steele (25:43):

I don't think you've mentioned digital badges at this point. Do you have any thoughts or views on where things stand with digital badges, the value or the lack of value in them?

David Rozsa (25:55):

Yeah, I think digital badges are definitely inevitable. So I guess I haven't mentioned them because we just consider them a standard part of the business. So we digitally badge all of the credentials of all of our clients' credentialing programs that we manage, and we have a strategic partnership with Credly for this. And the only difference really between a digital badge and any other indicia of a credential is that the digital badge has real-time verification of the fact that it's still valid. So you click on the digital badge, and the digital badge hosting organization will tell you whether that particular credential is still in effect. So I think it is significantly high-value compared to a piece of paper certificate or any other indicia of the credential, and it's very low-cost, so I don't see any argument against digital badging.

Jeff Cobb (27:07):

David Rozsa is CEO of Metacred and an expert in credentialing. You'll find links to learn more about Metacred in the show notes for this episode at leadinglearning.com/episode305.

Celisa Steele (27:16):

At leadinglearning.com/episode305 you'll also find a link to connect with David on LinkedIn. His profile name on LinkedIn is simply the word *credentialing*, which gives you some added insight into just how passionate and committed to credentialing David is.

Jeff Cobb (27:35):

In the show notes you'll also see options for subscribing to the Leading Learning Podcast. And we'd be grateful if you would subscribe, if you haven't yet, as subscriptions give us some data on the impact of the podcast.

Celisa Steele (27:47):

We'd also be grateful if you would rate us on Apple Podcasts, especially if you find the Leading Learning Podcast valuable. Jeff and I personally appreciate reviews and ratings, and they also help this show show up when people search for content on leading a learning business. Go to leadinglearning.com/apple to leave a rating.

Jeff Cobb (28:06):

Lastly, please spread the word about Leading Learning. At leadinglearning.com/episode305, there are links to find leading learning on Twitter, LinkedIn, and Facebook.

Celisa Steele (28:16):

Thanks again, and see you next time on the Leading Learning Podcast.

[music for this episode by DanoSongs, www.danosongs.com]

This transcript accompanies the episode of the Leading Learning Podcast available at www.leadinglearning.com/episode305.