ICE Digest: 2014 Winter Edition

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This is the time of year when it’s common for many of us to reflect back and share our plans for the year to come. 2013 has been a busy year for ICE and the credentialing industry. We celebrated a great year with record attendance at the ICE Exchange this November — more than 550 individuals participated either in person or through the virtual conference. From the first-time attendee reception through the closing plenary session, the level of interaction was tremendous. Although the post-meeting survey responses have not yet been formally analyzed, I can personally report that the energy throughout the conference was fantastic. We continue to see the growth of the credentialing profession at every meeting.

As an organization, ICE is committed to providing a platform for interaction, innovation, collaboration, education and networking. From all accounts, 2013 was a year where we achieved this goal. We saw a variety of learning opportunities that focused on all the domains of our profession — from entry-level to the CEO. (Check out the ICE Academy for information on some of these opportunities) Our Research and Development Committee continues to produce the relevant research needed to guide credentialing programs and organizations to the next level, releasing two new reports this year.

A revision process of the current NCCA Standards is currently underway. We anticipate sharing a public comment draft later in 2014. We’ve developed a CEO Series for 2014 that will include an invitation-only summit in February as well as a full year of educational opportunities (webinars, quarterly conversation and more). We have also been working on an expansion of the Certification 101 course to include another level, Certification 201.

These are just a few of the highlights of what has been a fantastic 2013 for our organization. ICE is well-positioned to have another great year. We thank all our volunteers for their engagement and enthusiasm. On behalf of the entire ICE Board of Directors, I encourage you to engage with colleagues and the ICE staff and board through our online platform. Together we will continue to grow ICE and the credentialing industry.

Denise Fandel, CAE, MBA
ICE Chair
We’ve all seen the AT&T commercials in which the “AT&T guy” asks elementary school students, “What’s better, more or less?” The answer is not complicated. Children get it. We know it. More is better than less. However, we in the testing industry frequently choose to offer very limited test-delivery options to specific candidate populations, and we group certain programs into specific methods of test delivery.

The aim of this article is not to argue for or against any specific model, but rather to make the claim that it is OK, and oftentimes highly beneficial, to offer test delivery method choices that fit the needs of your stakeholders. Simply put, more is better than less.

Freedom to choose is liberating. Even in the seemingly mundane world of test delivery, breaking free from the convention of providing only one test delivery option can be energizing to both candidate populations and sponsoring organizations. In working with a number of programs that have added testing options for their candidates, I have yet to see a program experience a decrease in the number of participants each year or a decline in the satisfaction rate of the candidates after a new option was introduced as a supplement to an existing option.

**Choices and Decision Factors**

There are more options than ever before to deliver high-stakes tests in a secure fashion. Sponsoring organizations routinely choose to limit test delivery to one of these common methods:

- **Paper-based testing (PBT)**
  - Annually, semi-annually, monthly, on-demand
  - Through a testing vendor’s delivery channel or through the test provider’s partner channel
- **Internet-based testing (IBT)**
  - During windows or on-demand
  - Through a testing vendor’s delivery channel or through the test provider’s partner channel
- **Live online proctoring (LOP)**
- **Device-based testing (DBT)**

To determine if it is appropriate for your program to add more test delivery options, consider the following factors:

- **Candidate location (urban, rural, regional, national, international):** The more widespread the candidate population, the greater likelihood that limited options are preventing the program from reaching the maximum number of potential candidates.
- **Test security:** Rapid technological advances have made newer testing methods much more secure. Before quickly dismissing an option, be sure to learn about the new security features that have recently rolled out to the market.
- **Business needs:** Some options allow for more continuous cash flow throughout the year while other options may motivate candidates to register by requiring specific registration deadlines.
Accreditation aspirations: At this time, not all delivery options have been fully vetted for approval by accreditation groups. Over time, accreditation bodies will be making formal decisions.

Candidate population’s technology acumen: Some candidate populations may not be as comfortable with online testing methods, while others may already be making demands for more Internet-based options.

Accessibility of technology to your candidates: Some options, such as live online proctoring (LOP), require candidates to provide their own computers.

Knowing that flexibility and choice are demanded by the younger generation entering the workforce, it is time to take a fresh look at each of these factors and reconsider which test delivery options will work best for your candidates and your certification program.

Finding Balance

Taking a test is not an event that anyone enjoys. The test is a necessary hurdle an individual seeking to grow professionally must jump over. However, for a test provider, security and the organization’s financial, psychometric and operational livelihood must trump the candidate’s convenience. So how do you find a balance that can work for the test provider and the candidate?

The good news for both test providers and candidates is that the technological advances within the marketplace have opened the door to great freedom in choosing multiple delivery options rather than just staying with the traditional, one-delivery method per examination program. Currently, there are a number of flexible online test delivery systems, convenient live online proctoring systems, and highly configurable candidate/credentialing management systems that combine in a way that enhances a program’s ability to provide superior services and choices, attract more candidates and satisfy a candidate’s need for convenience.

There are several key stakeholder groups to consider when making decisions for which types and how many delivery methods to offer to a particular candidate volume. Having more options available may be a win-win-win solution for candidates, test providers and test delivery vendors.

Offering multiple test delivery options is a win:

- For the candidate
  - Scheduling convenience
  - Lower overall expense (potentially less travel, less time off work, less arranging for dependent care, etc.)
  - More prompt retake options upon receiving a fail result
- For the test provider
  - More continuous cash flow
  - Ability to reach a greater number of candidates
  - Potentially greater revenue
- For the test delivery vendor (when the customers win, vendors win)

The reality is that making a decision about test delivery methods is complicated due to the fact that you need to get buy-in from each of your key stakeholders. Nevertheless, ask yourself what you want to do now that you know you have a number of tools at your disposal in the marketplace that allow you to
more effectively manage and track candidate data, seamlessly control test delivery and registration logistics, and generate customized reports.

It’s not complicated — more is better — so continue to ask for and demand highly flexible online test delivery systems and highly configurable candidate management systems. And with today’s test delivery technology, there is no reason why you can’t have it.

Scott Greene is the vice president of Test Delivery at Castle Worldwide Inc. and has more than 20 years of test delivery experience: first through his role as a high school counselor and then more than 16 years with Castle. He earned his bachelor’s degree in psychology and his M.Ed. in school counseling from the University of North Carolina in Chapel Hill. He is a long-term member of the National College Testing Association (NCTA) and currently serves on the NCTA strategic planning committee. Greene oversees the team at Castle responsible for test delivery via Internet-based testing, paper-based testing and live online (remote) proctoring.
Why would two certification corporations want to jointly partner in the development and ownership of a new certification program? The Board of Certification for Emergency Nursing (BCEN®) and the Pediatric Nursing Certification Board (PNCB®) were both interested in developing a pediatric emergency nursing certification. Therefore, instead of each certification corporation developing a competing certification program, BCEN and PNCB decided to jointly investigate the need for a pediatric emergency nursing certification. Both certification corporations were financially strong, somewhat equivalent in certification size, and well established within the emergency and pediatric nursing communities, respectively. It made perfect sense to collaborate, especially after understanding each organization’s corporate and board cultures.

Reaching an Agreement

It was apparent from the very beginning that the best results for both organizations involved equivalent ownership. In order to ensure that the relationship between the two organizations was an identical fiduciary affiliation, an agreement was needed for the exploratory phase of this project. Chief staff executives from both organizations met to consider a collaborative agreement for investigating the need for the certification along with potential development and joint ownership. The agreement contained provisions for next steps as well as a “Values Statements Guiding the Development of a Pediatric Emergency Nurse Certification” that was signed by each board president and chief staff executive.

The values statement contained statements and specifics pertaining to quality, equity, diversity, fairness, honesty and ethical standards. The parties concurred that the values statement would guide all business and operational decisions between the two organizations. Therefore, all future collaborative agreements between both organizations used the values statement to guide ongoing contract development. The mantra between the two organizations was and remains today: “joint ownership, joint expenses and joint revenue” along with “equal risks and rewards.” Of course, this meant frequent electronic communications, phone conversations and face-to-face meetings, especially in the beginning.

Conducting a Needs Assessment

Once an agreement was reached between the two certification corporations to investigate a pediatric emergency nursing certification, BCEN and PNCB sought the professional services of Applied Measurement Professionals (AMP) to conduct the needs assessment. The chief staff executives, board leaders from both corporations, and AMP met to develop the discussion guide for future focus groups that would serve as the basis for the needs assessment questions. There were two focus groups, one each held at an emergency nursing annual conference and a pediatric nursing annual conference in 2005. A 16-question needs assessment survey was distributed electronically to approximately 12,000 email addresses provided by both organizations in 2006. There were more than 3,000 respondents (28 percent response rate). The following were some of the pertinent questions both corporations considered when deciding upon further development of a joint certification.

- Would you seek certification in pediatric emergency nursing?
  - 57 percent said “yes.”
- If yes, how soon after the certification program was available would you apply?
  - In the first year of offering: 63.2 percent
  - In the second or third year of offering: 28.8 percent
Later than the third year of offering: 8.1 percent
• If you earned a certification as a pediatric emergency nurse, would you maintain another nursing related certification?
  • 74.1 percent said “yes.”

The BCEN and PNCB boards voted to proceed with a role delineation study/practice analysis for the development of a jointly owned certification. History was in the making! Expert panels were convened in 2006 to design the role delineation study survey and later to evaluate the results upon which the exam content outline/blueprint was developed. Following the conclusion of the role delineation study, both boards voted to proceed with the development and delivery of a joint certification. AMP would be the test development and delivery vendor providing registration services, customer service and acting as a conduit for the two certification corporations to share revenue and expenses.

Negotiating a Jointly Owned Certification Agreement

There were many meetings between key staff leaders to negotiate a jointly owned certification agreement. Once an agreement was reached between BCEN and PNCB relative to the joint ownership of the Certified Pediatric Emergency Nurse (CPEN®) credential, then negotiations commenced and an agreement was reached among BCEN, PNCB and AMP to develop and deliver the exam. This agreement represented another significant milestone involving mutual respect along with give-and-take compromises.

The expert panel meetings provided BCEN and PNCB with the opportunity to assess the panelist contributions and to invite some of the panelists to serve on the exam committee. All panelists, including those who served as exam committee members, initially served as item writers for a couple years to ensure that there was a robust item pool developed. BCEN and PNCB also put out calls for additional item writers. Item writing training took place in 2007, followed by exam construction. Pilot testing occurred in 2008, and the maximum number of 200 beta candidates was reached after exam registration was open for only 45 minutes.

The CPEN exam subsequently launched in January 2009 and has been gaining momentum ever since, with more than 3,400 CPENs today. Since the launch of CPEN, there have been subsequent agreements pertaining to recertification and a role delineation study/practice analysis resulting in new exam specifications early in 2013. Those who were amongst the first to become CPEN certified are now recertifying. To date, this jointly owned certification program is the only one of its kind between two nursing certification boards.

Conclusion

What have been our lessons learned since embarking on this project in 2005? Strong leadership and long-term commitment from all three organizations were needed. Education of staff and board in understanding the joint relationship and differences in the CPEN credential versus each corporation’s proprietary credentials was also important. An openness to negotiate on decision points such as recertification cycles, recertification requirements and volunteer benefits was key. At all of the content expert panel meetings, item writing training sessions, and exam committee meetings board representatives from both organizations participate, as well as a chief staff executive. BCEN and PNCB are in it for the long haul and committed to “getting to yes” in all negotiations. However, there will always be a focus on maintaining humor and having fun along the way.
Francine (Tancy) Stanbery, MSEd, CAE, is the chief executive officer of the Board of Certification for Emergency Nursing. She is responsible for the development and implementation of strategic and operating business plans for the corporation, which includes oversight of the organization’s four certification programs. She is also responsible for the business relationship with the Pediatric Nursing Certification Board relative to the jointly owned Certified Pediatric Emergency Nurse exam.

Margaret (Peg) Harrison, MS, RN, CPNP, is the chief executive officer of the Pediatric Nursing Certification Board. She has served on the board since 2011 and previously served as PNCB’s executive vice president for general practice exam development from 2006 to 2011. She is responsible for carrying out the mission and strategic plan of the organization and providing leadership and overall management of the budget, marketing, and activities and programs associated with four certification programs.

Lawrence J. Fabrey, PhD, is the senior vice president of psychometrics at Applied Measurement Professionals, a national testing company located near Kansas City. He also serves as the project director for real estate licensing programs as well as several nursing specialty and health care related certification programs. He was a voting psychometrician for the National Commission for Certifying Agencies (NCCA) for six years and chair of the NCCA for three, while also serving on the Board of the National Organization for Competency Assurance.
In September 2013, the International Society for Performance Improvement (ISPI) announced updates to the Certified Performance Technologist (CPT) certification. A panel discussion with practicing CPTs followed the announcement by ISPI’s president, Lisa Toenniges, CPT.

The panelists, who represented military, business and international organizations, presented examples from their project experience. A common theme quickly emerged: The CPT certification represents a high standard of work, and CPTs can be called on to consistently produce high-quality outcomes.

For managers and executives, this means CPTs can be assigned projects with less supervision and higher expectations. This theme also underscores the need for credentialing professionals to frequently reassess the work practices certifications are based on.

Offered since 2002, CPT is a performance improvement credential based on a comprehensive demonstration of real-world experience and competence across multiple projects as well as a commitment to a code of ethical practice. CPTs must also demonstrate their ability to satisfy 10 standards of performance technology. The standards describe human performance technology (HPT) as applied by a competent certified performance technologist. They include:

1. Focus on results or outcomes.
2. Take a systemic view.
3. Add value.
4. Work in partnership with clients and stakeholders.
5. Determine need or opportunity.
6. Determine cause.
7. Design solutions including implementation and evaluation.
8. Ensure solutions’ conformity and feasibility.
10. Evaluate results and impact.

Three practice analyses have been done to determine the validity of the 10 standards. The first, an analysis of HPT, was completed in 2000 and resulted in the 10 CPT standards and certification program. The second began in 2008 but was not completed (1).

The third validation study was completed in 2012. It employed a mixed-method design, including quantitative and qualitative research data acquired through an online survey, interviews, focus groups and literature review. The study captured the responses of 797 people from 24 countries. The participants included CPTs, non-CPTs, ISPI members and nonmembers, managers, practitioners and employers (2).

The study asked two questions:

1. Do the 10 standards reflect current practice?
2. Do practitioners consider the social environment, marketplace, workplace and worker in the application of the standards?

The answer to the first question was yes. The study concluded the standards reflect current practice and identified three opportunities for strengthening them. The first recommendation was to add performances related to consulting and project management where appropriate. The second was to
clarify the distinction between two types of analysis: needs (gap) and cause. The third recommendation was to modify one standard to reflect a change in how CPTs participate in solution development. All three recommendations were implemented.

The answer to the second question was also yes. While HPTs have always considered the work, worker and workplace in their approach, the study indicated that factors outside the workplace — like the social environment, marketplace and world — were becoming increasingly more important in HPTs’ work.

Unlike skills and knowledge, which may remain constant for a long time, work practices can change rapidly based on technological, regulatory and societal changes. This makes it critical for credentialing professionals to frequently assess certifications based on professional work practices, like the CPT.

The 2012 practice analyses suggested that smaller and more frequent studies focusing on fewer standards should be completed to identify trends and changes in a timely manner (3). This recommendation is still being considered.

References


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Planning Your Own Chaos  
By Deborah L. Dickinson

These days, regulatory mandates and changes to standard practices are the norm, leaving many professionals looking for ways to feel accomplished in this new environment.

Planning for chaos is a business strategy that does just that. In order to be successful at planned chaos, though, you must be able to laugh at yourself and the circumstances in front of you.

Why Create Chaos?

The business climate, regulatory mandates, new standards, vendor changes and our own business needs drive change. Change happens continuously, and with change — even sought-after change — comes varying degrees of chaos. Chaos becomes out of control when organizations don’t expect or prepare for the unexpected. Thus, being prepared and planning for chaos allows organizations to grow and, as a result, grow more than ever.

Four steps guide teams through the chaos: Plan, Anticipate, Brand and Survive (PABS).

- Plan for chaos to move through needed changes faster.
- Anticipate chaos to show strength of readiness and adaptability.
- Brand the chaos to communicate and have anchor messages during difficult times.
- Survive the chaos to prove possession of super powers or, at least, admirable resiliency.

How Do You Create Chaos?

To plan for chaos, follow the PAINLESS process.

1. Pick your moment.

   - Build confidence by finishing or removing old to-dos.
   - Admit when you are short-staffed and have no budget for a proposed change.
   - Move forward — obstacles are meant to be overcome!
   - Balance — you may need to set some things aside to create capacity for chaos.

A note on deleting old tasks: Thirty-four years ago, some investors announced plans to build a “Gone with the Wind” theme park nearly 30 miles outside Atlanta. Those plans never came to fruition. Instead, 20 years ago, the area became a beautiful, residential development built around a lake and golf courses. Thousands of people made their home there.

However, the city council continues to discuss and debate the theme park idea, even spending hundreds of thousands of dollars on traffic studies. The residents of the new community are now the cash cow for the city. The would-be theme park investors have long since died or lost interest, and the land where it was scoped is no longer available. The outdated traffic plan would rip the community in two and route 18-wheelers past homes and neighborhood shopping. Yet, money and resources continue to be wasted.

As we reflect on this small town political drama, we must ask ourselves: If a plan never takes shape, was it the right or best plan? One of the factors for deciding the right timing for your planned chaos is to assess your projects. What old projects are draining your resources? Get rid of them! Your team and finances will thank you, and you will be ready to take on new challenges.
2. Act with purpose — know your steps, milestones and timeline.

- Expect that some important things will not happen as planned.
- Look for the golden nuggets of opportunity that surface.
- Discuss and discern the best action for both of these situations.

We all look for signs to see if we are on the right road. A map does not list every business or point of interest along the way. Leaders define steps and milestones and work with the team to agree on a timeline.

Likewise, you must coach your team to anticipate possible detours. Give people latitude to determine the best route. Checkpoints or milestones are reference points to keep the overall plan on track. Expect that in some areas the plan will not be working well. In some cases, previously unknown opportunities may take shape. Be ready to discuss and discern the best course of action.

3. Involve.

- Ask and affirm with the team, customers and others you trust and respect.
- Be specific in your questions so that answers lead to decisions.
- Remember, this is about making the most of chaos.
- Rework the plan based on the valuable input received.

Thankfully, no one likes a know-it-all. Thus, you do not have to have all the answers.


- Readdress priorities, as needed, but stay the course
- Ask what else needs a redo now that you have the benefit of hindsight.

There will be moments when you want to give up on the entire project. Remember that setbacks happen. As you encounter obstacles, think about how to improve. Learn from the experience. What do you know now that you didn’t know before the setback? Be daring. Now that you have the benefit of hindsight, ask yourself: What else needs reworking?

5. Listen.

- People have opinions — seek them and use what fits.
- Show appreciation by crediting the ideas to the thinkers.

Showing appreciation for the thinkers also gives us another reason to celebrate and let the world know that we are on track and doing fine.

6. Emphasize the goals.

- Working and reworking something new is exhausting.
- Limit the scope to the stated, agreed-upon goals.
- Be the visionary.
- Champion the work and the workers, including yourself.
People cannot stay productive and deliver high-quality work if the chaos seems to have no end in sight. Plan a start and an end. Be open, flexible and amiable in the interim.

7. See the value.

- Make the goals real: visual, tangible, exciting.
- Have every person involved write and publically rehearse “elevator” speeches.

Every person in your organization should know and understand the “elevator” speech that explains why and what you are doing and how the organization is improving. Each person’s speech must be in their own style and describe their contribution to the project — in 90 seconds or less. On the reality show “The Voice,” 90 seconds is all the contestants get to show they have the whole package. Practice your 90 seconds with others on your team.

8. Seize the day

- Each new day will have a new challenge — don’t be surprised by it.

We avoid change because we fear the unknown. We retreat from chaos because it’s hard and confusing and we get lost. How is that productive? It isn’t unless you plan and prepare a PAINLESS process for yourself and your team.

I once overcame fear by seeing the thing I was afraid of in a new light. As a newlywed, I took scuba-diving lessons because my husband loved diving in Guam, the Philippines and other beautiful places around the world. It scared me terribly. But once I learned that humans really could breathe underwater, I found it adventurous. You’re just breathing — in and out. Even buddy-breathing, which is nothing more than sharing air, builds a trust that we treasure. Breathe in, hold for a few seconds, let it out and breathe again. It will take you from 100-feet below water to the surface, up to the dive boat that delivers you safely back to dry ground.

Beware the Resistance

If chaos is so natural and beneficial, why does it get such a bad rap? Rewriting rules and reshaping thinking are Herculean tasks. Getting people to actually behave differently is an even greater challenge. However, those are the very reasons to pursue chaotic change — to move through the chaos with minimal difficulty, speed and agility.

What vital change is expected or needed in your near future? Before you start to tackle this challenge, remember to plan for chaos, and you will be successful.

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Financial Planning Standards Council (FPSC®) is a not-for-profit organization that develops, promotes and enforces professional standards in financial planning through Certified Financial Planner® certification. As a certifying body, FPSC ensures CFP® professionals and candidates meet appropriate standards of competence and professionalism.

The path to CFP certification includes these two examinations:

- Financial Planning Examination Level 1 (FPE1®), composed of multiple-choice questions.
- Financial Planning Examination Level 2 (FPE2®), composed of multiple-choice and constructed-response (CR) questions.

This article will focus on best practices in developing CR questions and outline key elements to consider when developing these types of questions to ensure efficient and accurate scoring.

What Are CR Questions?

CR questions are composed of a case narrative, which outlines a request, situation or financial planning problem. It also lays out a common scenario in the world of financial planners.

The case narrative is followed by a series of questions candidates must respond to. Candidates respond to the questions by filling in templates that provide guidance on how to format the answer.

Each CR question must include a sample response, a scoring table and a rationale section, as these are used to score the CR questions. The sample response provides an example of a correct response to the question and is used to guide scorers on which answers are acceptable. The scoring table breaks down the correct response into each element or indicator to be scored and provides detailed information on marks allocation. The rationale provides information or reasoning supporting the correct response or discounting any incorrect responses.

Key Elements to Consider when Developing CR Questions

One key element to consider when developing a good CR question is to ensure the question specifies the task and defines the parameters of the expected response. The question should indicate how the response should be structured, what issues should be addressed, how long the response should be, and what format it has to follow. It should clearly define a task for candidates to be able to provide a structured answer.

Questions should not contain any ambiguity, and candidates should be able to clearly understand them. The questions are designed to test the candidate’s competence, not their ability to decipher what the question is asking.

A common mistake in writing constructed response questions is failing to make the task sufficiently clear to candidates. Candidates need to understand completely how they are expected to respond to a question or their responses could be incomplete or off-target.

An efficient way to ensure candidates understand what is required of them is to provide a response template. A response template is a structured table or form in which candidates record their responses. It provides further guidance on what is required and where to write answers.
During the first iteration of our development process, our CR questions included generic templates. We received feedback that it was very confusing and unclear about how responses should be formatted. In addition, scoring of the CR questions was more challenging as answers were provided in an unstructured manner. Structured response templates not only provide clear guidance to candidates but also facilitate the scoring process as scorers know where to look for the answers.

Below is an example of a question and its corresponding response template. The template would follow a complete case narrative providing a financial planning scenario.

*Identify the three current issues of the highest priority for the client. Briefly describe what will be the impact on the client’s financial position if no action is taken on these issues. (4.5 marks)*

<table>
<thead>
<tr>
<th>Current Issue (1.5 marks)</th>
<th>Financial Impact if no action is taken (3 marks)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td></td>
</tr>
<tr>
<td>2.</td>
<td></td>
</tr>
<tr>
<td>3.</td>
<td></td>
</tr>
</tbody>
</table>

In this example, candidates are asked to identify three issues and then briefly describe their impact. A table like this helps candidates ensure they have included all the required parts of the response (and understand the number of marks allocated to each element of the answer).

Another key element to provide as part of CR question development is a sample response. A sample response provides the correct answer to a question or the expected format and content of a response. Sample responses should be provided in the same format as the response template to ensure accurate and consistent scoring. It should include, when possible, all potential answers to the question.

Building on the example provided above, here is an example of a sample response:

<table>
<thead>
<tr>
<th>Current Issue (1.5 marks)</th>
<th>Financial Impact if no action is taken (3 marks)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Cash flow</td>
<td>Need to increase debt to maintain lifestyle</td>
</tr>
<tr>
<td>2. Debt</td>
<td>Non-manageable payment if interest rates increase</td>
</tr>
<tr>
<td>3. Risk management</td>
<td>Financial risk if loss of salary incurred</td>
</tr>
<tr>
<td>4. Asset allocation</td>
<td>Investment not suitable considering risk profile leading to larger potential loss</td>
</tr>
<tr>
<td>5. Will</td>
<td>Inefficient transfer of estate assets leading to possible over-payment of taxes</td>
</tr>
<tr>
<td>6. Power of attorney</td>
<td>Loss of control of finances if incapacitated</td>
</tr>
</tbody>
</table>
The sample response is used by scorers, in conjunction with a scoring table, for scoring purposes. The scoring table provides the breakdown of marks for the question or the structure of the scale to be used in rating the question. The scoring table identifies the details of the written response to be evaluated and indicates the number of marks assigned to each element of the required answers.

Once again building on the example above, here is a sample scoring table used by the scorers to allocate marks:

<table>
<thead>
<tr>
<th>Task</th>
<th>Indicator #</th>
<th>Indicator Description</th>
<th>Mark</th>
</tr>
</thead>
<tbody>
<tr>
<td>Identifies three current issues of the highest priority for the client.</td>
<td>1</td>
<td>First current issue</td>
<td>0.5</td>
</tr>
<tr>
<td></td>
<td>2</td>
<td>Second current issue</td>
<td>0.5</td>
</tr>
<tr>
<td></td>
<td>3</td>
<td>Third current issue</td>
<td>0.5</td>
</tr>
<tr>
<td>Describes impact of identified issue on the client’s financial position if no action is taken</td>
<td>4</td>
<td>Description of financial impact for first issue</td>
<td>1</td>
</tr>
<tr>
<td></td>
<td>5</td>
<td>Description of financial impact for second issue</td>
<td>1</td>
</tr>
<tr>
<td></td>
<td>6</td>
<td>Description of financial impact for third issue</td>
<td>1</td>
</tr>
</tbody>
</table>

This scoring table ensures structured scoring and provides clear direction on how marks are to be allocated to the candidate’s answer.

In sum, a detailed and structured sample response (using the response templates provided for the candidate’s answer), a structured scoring table providing clear breakdown of mark allocation, and a detailed rationale for the correct answers and incorrect answers are critical elements to assist in more efficient and consistent scoring.

Takeaways on the Development and Scoring of CR Questions

- Below are key takeaways on the art of developing and scoring CR questions:
- Developing clear and unambiguous CR questions and structured response templates will lead to more consistent and structured candidate answers, which will then lead to more efficient and accurate scoring.
- Developing a detailed sample response within the established response template will provide clear guidance to scorers as to the acceptable answers and expected format.
- A structured scoring table with a clear breakdown of marks will limit score interpretation and increase scoring accuracy.
Isabelle Gonthier holds a doctorate in cognitive psychology from the University of Ottawa. She has been providing her expertise in assessment and testing and measurement for more than 10 years and in research, statistics and data analysis for more than 15 years. As the director of certification process and examinations at FPSC, Gonthier oversees the development of the two FPSC examinations leading to the CFP® designation. Gonthier also oversees the organization’s certification process and policies.
The Public’s Perception of Certification
By Dottie Jeffries

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Read The Public’s Perception of Certification

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