Welcome to the SES/ANSI September Webinar

Certification of Standards Professionals

Wednesday, May 17, 2017
12:00 - 1:30 pm ET

Guest Speakers:

Roy Swift, Executive Director at Workcred
Lee Webster, Director, Employee Relations at University of Texas Medical Branch (UTMB)
Donggeun Choi, Principle Researcher, Korean Standards Association (KSA)
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Roy Swift, Workcred

Certification Overview

Roy Swift
Executive Director
Workcred
Personal History with Certification

- Started as an item writer for the Occupational Therapy Assistant Certification examination
- Provided formal training by Dr. Jim Popham at UCLA and CEO of Instructional Objectives Exchange, a clearinghouse for behavioral objectives for educators and test developers
- Served as CEO of the National Board for Certification in Occupational Therapy (NBCOT) that creates the national certification examinations for the Therapists and the Assistants
- Came to ANSI to create an accreditation program for certification using the ISO/IEC Standard 17024 – Conformity Assessment – General requirements for bodies operating certification of persons
  - General Requirements – Legal, Decisions on Certification, Impartiality, Finance and Liability
  - Structural Requirements
  - Personnel Requirements
  - Records and Information
  - Certification Schemes for Persons
  - Certification Process requirements
  - Management System requirements
Selected by the Secretary of Veterans Affairs to serve on the Professional Certification and License Advisory Committee

Served on the Board of Directors of the Institute of Credentialing Excellence

In 2014, launched Workcred as a separate 501(C)(3) of ANSI focused on workforce credentials

Regularly serve as a national speaker on quality certifications

Served on Connecting Credentials Task Force on “Building Trust in the Quality of Credentials”

Currently chairing the Certification and Licensure Advisory Group of Credential Engine
Mission: To strengthen workforce quality by improving the credentialing system, ensuring its ongoing relevance, and preparing employers, workers, educators, and governments to use it effectively.

Vision: A labor market which relies on the relevance, quality, and value of workforce credentials for opportunities, growth, and development.
SDBok Progress

Lee Webster
Director of Employee Relations
University of Texas Medical Medical Branch (UTMB)
Business Case

• Need to improve the professionalism of Standards Developers
• Need to make the certification program relevant to the professional development of SDs
• Need to improved the rigor and credibility of the certification program to stakeholders
• Need to establish a certification that is agile and keeps up with current practice and technology in the field
• Need to establish a certification that reveals effective execution in the field
• Need to establish a certification that inspires research, training, and professional development in the field
• Need to communicate the value of SD to the stakeholders
Standards Development Body of Knowledge ("SDBoK")
Levels of Knowledge

• **Core**: Known by all participants in the standards development process to be effective. Sufficient knowledge to run a committee or working group.

• **Professional**: Known by any participant who is responsible for managing the workflow of the standards development process. Sufficient knowledge to run a committee or program.

• **Strategic/Specialized**: Known by any participant who is responsible for integrating and advancing standards initiatives with external stakeholders. Sufficient knowledge to run a committee, program, or portfolio (including conformity assessment)
Standards Development Body of Knowledge ("SDBoK")

Limited availability of:
- Ideas
- Experts
- Funding
- Time

Pressure

Environmental Influences
- Technological change
- Social change
- Innovation
- Market needs
- Legal effects
- Industry interests
- Consumer interest
# Knowledge Groups

<table>
<thead>
<tr>
<th>Core</th>
<th>Technology</th>
<th>Marketing and Sales</th>
<th>Infrastructure</th>
<th>Human Capital</th>
<th>Logistics</th>
<th>Operations</th>
<th>Strategy</th>
<th>Services</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Teleconferencing</td>
<td>Business Plan writing</td>
<td>Voting/Balloting</td>
<td>Recruiting experts</td>
<td>Document archiving</td>
<td>Essential Requirements</td>
<td>History of Standards</td>
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<td></td>
<td>Virtual Meeting</td>
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<td>Forms and documents</td>
<td>Recruiting Committee Leaders</td>
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<td>ANSI Procedures</td>
<td>U.S. Standards System</td>
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<td></td>
<td>Knowledge management software</td>
<td>How to join a committee</td>
<td>How to start a committee</td>
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<td>Document writing</td>
<td>Negotiations</td>
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<td>Document editing</td>
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<td>Committee Management</td>
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<td>Codes/Ethics</td>
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<tr>
<td>Professional</td>
<td>Technical writing</td>
<td>SDO management</td>
<td>Cross cultural communications</td>
<td>Meeting management</td>
<td>Program Management</td>
<td>Sourcing project ideas</td>
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<td></td>
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<td>US TAG Management</td>
<td>ISO TC Management</td>
<td>Visa Management</td>
<td>Meeting budgeting</td>
<td>Dispute Resolution</td>
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<td>Managing appeals</td>
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<tr>
<td>Specialized</td>
<td>Standards pricing</td>
<td>Secretary duties</td>
<td>Convener duties</td>
<td>Chair duties</td>
<td></td>
<td>Strategic Standardization</td>
<td>Conformity Assessment</td>
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<td></td>
<td>Product development</td>
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<td>Patent and Trademark</td>
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Subgroup Clusters

• Standards Management and Strategy:
• Human Capital and Expert Management:
• Marketing and Sales:
• Technology and Infrastructure:
• Logistics and Planning:
• Operations:
Finding Knowledge Elements

• By Role
  – Sponsor
  – Participant
  – Management
  – Adopter
• By lifecycle
  – Pre standards
  – Development
  – Publication
  – Adoption and Renewal

What do you need to know to perform in each stage?

I need to know X to do . . . ?
Example SDBok

A Guide to the Standards Development Body of Knowledge (SDBoK)

A publication of

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# Example SDBok

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## 3 Standards Development Body of Knowledge ("SDBOk")

The Standards Development Body of Knowledge divides below into functional areas. Each functional area outlines the responsibilities of and knowledge needed to work as a participant (both professional and non-professional) in an area of practice.

<table>
<thead>
<tr>
<th>SD Functional Areas</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Standards Management and Strategy</strong></td>
<td>Developing standards that contribute to supporting the sector’s or organization’s mission, vision, strategic goals, and objectives; formulating policies, guiding and leading the change process and evaluating organizational effectiveness after adoption of the standards.</td>
</tr>
<tr>
<td><strong>Human Capital and Expert Management</strong></td>
<td>xx</td>
</tr>
<tr>
<td><strong>Marketing and Sales</strong></td>
<td>xx</td>
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<tr>
<td><strong>Technology and Infrastructure</strong></td>
<td>xx</td>
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<tr>
<td><strong>Logistics and Planning</strong></td>
<td>xx</td>
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<tr>
<td><strong>Operations</strong></td>
<td>xx</td>
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</tbody>
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Example SDBok
Benefits

• Clarified what standards developers need to know at all levels
• Source of questions for certification exam
• Foundation for Standards Developer competencies
• Competencies are a foundation for training, compensation and other SD career activities
• Supports research
Next Steps

• 2017
  – Flesh out the knowledge Groups
  – Add and complete the definitions
  – Write the descriptions of knowledge
  – Review and edit the descriptions
  – Prepare for sharing and discussion at the conference

• 2018
  – Refine descriptions and circulate to professional community
  – Draft questions for certification
  – Validate question and create a draft exam

• 2019
  – Validate exam
  – Implement a pilot
Donggeun Choi, KSA

Certified Standards Professionals, Korea’s Experience and Vision

Donggeun Choi (Ph.D)
Principle Researcher
Korean Standards Association (KSA)
1. Global Overview: Certifying Standards Professionals

<table>
<thead>
<tr>
<th>Certification Programs</th>
<th>Competency Requirements</th>
</tr>
</thead>
<tbody>
<tr>
<td>• USA - SES (2005~2017)</td>
<td></td>
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<tr>
<td>– Astd (entry leve), Cstd (through, experienced)</td>
<td></td>
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<tr>
<td>– <a href="https://goo.gl/vo27iF">https://goo.gl/vo27iF</a></td>
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<tr>
<td>• Korea - KSA(2013~2017)</td>
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<tr>
<td>– CSP1 (advanced), CSP2(entry)</td>
<td></td>
</tr>
<tr>
<td>– Competency Requirements + Test Item Pool</td>
<td></td>
</tr>
<tr>
<td>• China</td>
<td></td>
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<tr>
<td>– It was reported that a few Chinese local authorities and universities started professional certification programs</td>
<td></td>
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<tr>
<td>• CEN Guide 14 (2010)</td>
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<tr>
<td>– Common policy guidance for addressing standardisation on qualification of professions and personnel</td>
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<tr>
<td>– <a href="https://goo.gl/ZK0LGK">https://goo.gl/ZK0LGK</a></td>
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<tr>
<td>• Japan – KIT(2013):</td>
<td></td>
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<tr>
<td>– Skill standard – Evaluation for skills of human resource required for standardization</td>
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<tr>
<td>– <a href="https://goo.gl/F6ZaFD">https://goo.gl/F6ZaFD</a></td>
<td></td>
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<tr>
<td>• China – CNIS (2011~2017)</td>
<td></td>
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<tr>
<td>– Knowledge System of Standard Science</td>
<td></td>
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<tr>
<td>– <a href="https://goo.gl/i1BmWR">https://goo.gl/i1BmWR</a></td>
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</tbody>
</table>
2. KSA’s CSP Program: In Support of KATS

**National Competitiveness**
- Human resources are considered one of the most vital factors of economic and social development
- Create a rich pool of standards professionals

**Career Development**
- To provide career development opportunity to standards professionals

**Certified Standards Professionals**

**Profession**
- To promote standards as a profession
- To acquire and retrain quality talents

**Networking**
- To promote a strong network among standards professionals
### 3. KSA’s CSP in Two Levels: Currently 38 CSP1 + 139 CSP2

<table>
<thead>
<tr>
<th>CSP 1</th>
<th>CSP 2</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Certified Standards Professionals 1st Class (Higher)</strong></td>
<td><strong>Certified Standards Professionals 2nd Class (Lower)</strong></td>
</tr>
<tr>
<td><strong>Requirements</strong></td>
<td>Completion of CSP level 2 course (36 hours)</td>
</tr>
<tr>
<td><strong>Related Course</strong></td>
<td>Available (CSP level 2 preparation course) (36h)</td>
</tr>
<tr>
<td><strong>Exam</strong></td>
<td><strong># of Questions</strong></td>
</tr>
<tr>
<td></td>
<td><strong>Test time</strong></td>
</tr>
<tr>
<td></td>
<td><strong>Pass</strong></td>
</tr>
<tr>
<td><strong>Evaluation Criteria</strong></td>
<td>Basic occupational knowledge regarding the planning, development, and application of standards</td>
</tr>
<tr>
<td></td>
<td>Advanced knowledge of unit-specific and sector specific standards</td>
</tr>
<tr>
<td><strong>Exam fees</strong></td>
<td>$10</td>
</tr>
<tr>
<td><strong>Issuing Organization</strong></td>
<td>KSA</td>
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</tbody>
</table>
4. Future Vision 2025

Standards Professionals Globally

- Recognition as Independent Profession
- Competency Requirements Publicly Available
- Career Vision/Roadmap Publicly Available

In ICES, APEC, ISO, IEC, PASC

- Korea’s Collaboration with the USA
- KATS, KSA with NIST, ANSI, SES, ASTM, IEEE...
5. Future Cooperation

**ICES 2017**
Chicago, USA
- 9 Aug – ICES-SES
- 10 Aug – ICES
- 11 Aug - WSC

**APEC Projects 2017-2018**
- Career Map
- Career Path
- Workshop in Singapore 2018

**IEC GM 2018**
- Oct 24-25
  - Conference
  - Exhibition
  - Paper Competition
Q & A
Wednesday, June 21, 2017 at 1:00 PM EDT

Henry Wixon, Chief Counsel at NIST and Kim Turner, Senior Director Client Services at Virtual, Inc.

**Understanding about Intellectual Property Rights (IPR) and Standard-Essential Patents (SEPs) in Standards Setting**

*Watch for news of SES webinars coming for Fall 2017*

Visit the SES website at [http://ses-standards.org](http://ses-standards.org) for webinar information

*Statements and opinions expressed by speakers are not necessarily those of SES, and the Society is not responsible for same.*
Thinking about becoming an SES Member?

Did you know? For the cost of two webinars you could become an Individual Member

SES Membership is open to anyone interested in the principles, techniques and effects of standards and standardization.

**SES Membership Types**

**Individual Membership:** Receive the bimonthly journal, *Standards Engineering*, attend conferences and training courses at reduced rates, and take advantage of professional growth opportunities.

**Organization Membership:** Register up to ten employees as Individual Members of SES who will receive the bimonthly journal, *Standards Engineering*, attend conferences and training courses at reduced rates, and take advantage of professional growth opportunities for one membership fee.

**Student Membership:** For college students preparing for a career working with standards. Receive the bimonthly journal, *Standards Engineering*, attend conferences and training courses at reduced rates, and take advantage of professional growth opportunities. *Student Membership is only $15 per year!*

Visit [www.ses-standards.org](http://www.ses-standards.org) for more information!
66th Annual SES Conference

Building Alliances in Standards and Conformity Assessment

The Drake Hotel, Chicago, IL
August 7 – 10, 2017

Visit www.ses-standards.org for more information and to register

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SES Course at Annual Conference

Register now for the educational offerings at the 66th Annual Conference

Visit www.ses-standards.org for more information!

Monday, August 7, 2017
Fundamentals of Standards and Conformity: Basic Knowledge and Tools for Today’s Professional

This full-day course provides fundamentals on standardization, along with tools and resources to be used throughout one’s career. The format features a series of instructors presenting on expert topics, followed by an interactive simulation on standards development facilitated by instructors. Attendees will earn 15 credits towards the SES Certification program for standards professionals.

- Introductory Concepts on the fundamentals of standards and conformity assessment
- IEEE Standards University’s Mars Space Colony Standardization

NOTE: Half day registration is available for either the morning or afternoon sessions, for those who do not wish to attend the entire day.

For more information and to register, visit the Annual Conference page on www.ses-standards.org

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Your Feedback is Requested

Thank you for attending today’s webinar

We appreciate your response to our Webinar Aftermarket Survey – watch your email following the webinar!