

The New Credentialing Process: An Update



As presented at the 2018
NAP National Training
Conference
September 8, 2018



Members of the NAP Commission on Credentialing

Burke (Thomas) Balch, PRP, Commission Chair

Gail Knapp, PRP, Commission Vice Chair

Frances Jackson, PRP, Commissioner

Rosalie Stroman, PRP, Commissioner

Gayla Stone, PRP, Commissioner



Where we started; Where we are; and Where we are going

- I. Some History and Definitions
- II. The Criteria for Credentialing Document
- III. The New Assessment Process in General
 - A. Comparison between the current system and the new one
 - B. Grandfathering and switching from the old system to the new one.
- IV. Beginning the New RP Assessment Process
 - A. Step One
 - 1) What is required
 - 2) Alpha Testing and Beta Testing
 - B. Step Two
 - 1) An in depth review of requirements
 - 2) Alpha and Beta Testing
 - C. Step Three
 - 1) Overview of probable system
 - D. Alpha and Beta Testing
 - E. Questions and Comments



New Definitions of RP and PRP



The most important first decisions made by the Commission when it was created three years ago required looking at the reality of what actual skills RPs and PRPs needed to have in order to fulfill the job responsibilities that are currently what RPs do and what PRPs do.





New Definitions of RP and PRP

Both the RP & PRP are expected to demonstrate qualifications to serve as a parliamentarian for organizations:

RP:

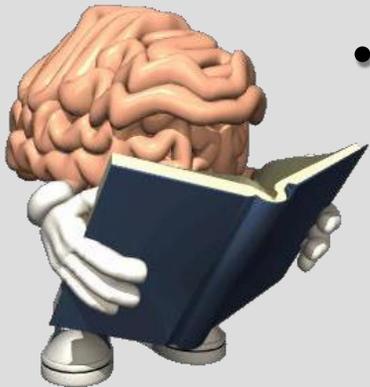
- **Most ordinary meetings under usual circumstances**
- **Commonly needed parliamentary advice to ordinary organizations**

PRP:

- **Meetings dealing with less common or more complex parliamentary issues**
- **Expert parliamentary advice to organizations dealing with unusual or complex issues**

Categories of Knowledge and Skill

- **What should the parliamentarian be able to know and apply during a meeting without having to consult RONR?**
- **What should the parliamentarian be able to rapidly look up in RONR and apply during a meeting?**
- **What should a parliamentarian be able to do outside a meeting while consulting RONR?**
- **Different levels for RPs (ordinary meetings, commonly needed outside-of-meeting advice) and PRPs (more complex meetings, unusual outside-of-meeting advice)**





A Summary of The New Assessment Process

There will be three steps for each candidate to complete before earning the credential. At present the Commission is completing the RP assessments. Once this is well established, a comparable process will be created for the PRP.

- **Step One – Online multiple choice tests predominately of knowledge and application of specific rules.**
- **Step Two– Assessment of things that parliamentarians do outside of meetings. They will include a series of written assignments with full use of references.**
- **Step Three – Demonstrates skill in applying the rules in a simulated meeting situation.**

Each Step (and each Part within each step) must be successfully completed before moving on to the next Part or Step, but retakes to achieve success will be provided for each Part of the assessment. Detailed feedback will be provided to assist in later success.

The Whole Process and What you Need to Know

- Based on the Body of Knowledge developed by the Special Committee on Education and Credentialing
- Highly specific references to page and line numbers in RONR and other sources
- Clear distinction between those standards whose rules the candidate will be expected to be able to know and apply without consulting the source, and those the candidate will be expected to be able to apply while consulting the source

The Criteria for Credentialing document is available on the NAP Website: Go to <http://www.parliamentarians.org>>Documents>Member Resources>Criteria for Credentialing Second Preliminary Edition (2017)

A Word about Terminology as Used in the Credentialing Document

- **Assessment:** A test to determine whether the candidate has the required knowledge or skill.
 - **Competency:** A broad basic skill. Candidates must show proficiency in all competencies identified for each credential in order to obtain that credential.
 - **Objectives:** Pieces of each competency. Objectives show all the steps to acquiring the competency or all the skills required to accomplish that competency.
 - **Performance Assessment Tasks:** The actual test used to measure whether the candidate has achieved the relevant competencies.
 - **Performance Expectations:** Identification of the relevant written material from RONR or other identified source where the particular information about that particular skill is described.
- 

Why Use Performance Assessment Tasks (PATs)?

-  Only being able to answer multiple choice questions does not indicate actual skill serving as a parliamentarian.
-  There are some things that a parliamentarian should have learned so thoroughly that using references to find answers to questions should not be required.
-  But, there are other questions that concern topics that are less frequently needed. An ethical parliamentarian will not trust his/her memory, but will check with references before answering those questions.

Why use PATs? Continued

 Memorization of RONR is not the same thing as having useful skills as a parliamentarian. It is important to have good skills of analysis and identification of problems and solutions as well as some writing and analysis skills.

 Some skills, like the research section of the RP exam, have become outdated with new technology.

 We assume that the PRP will continue to have the skills and knowledge of an RP. So PRP testing will include skills identified as those of an RP.

Why add the Steps to the process?

-  Starting with easier material and moving to more challenging testing is logical.
-  The testing is divided into smaller stages rather than a stress-producing marathon. Since the candidate will need to successfully complete each part before moving on to the next step, the emphasis will be on success rather than on failure.
-  Dividing the material into small, identifiable pieces makes the study process more productive.

Why use steps? Continued

-  **The Standards provide information about exactly what text needs to be mastered for each Step. They are color coded with exact pages and line numbers.**
-  **Candidates who have deficiencies in specific skills can be identified and given opportunities to gain those skills they are lacking before being retested.**
-  **Material in RONR that is only needed under very unusual circumstances is not included in the testing. The Commission assumes that individuals who are skilled at using reference material can access that material when and if needed.**

Will the new process be easier or harder than the current one?

OR

Should You Be Afraid of the new process?

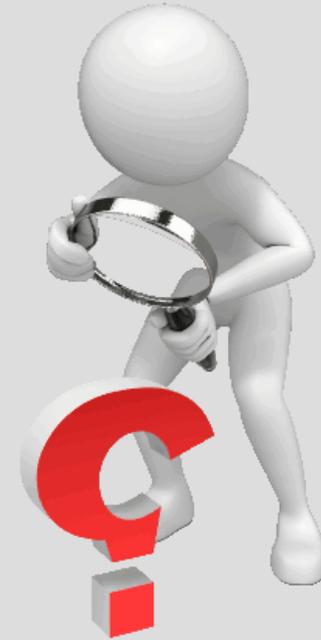


It will be different. And different can be scary. But you should *like* the new process.



What happens during the transition from the existing system to the new one?

- 1. Current RPs and PRPs**
- 2. Candidates in process of obtaining RP or PRP credentials**
- 3. After the Grandfathering period is over.**



What Remains the Same



For Current PRPs & RPs

- No requirement to go through new process to *retain* RP/PRP status for anyone with that status on the date the new process is implemented.
- The current process for *retaining* RP/PRP status remains the same for “grandfathered” RPs & PRPs

For Those in Transition - RPs

RPs will be “grandfathered” if they already have earned the credential:

There will be an approximately 2 year grace period *after* the implementation date to attain PRP under current process.

(Exact period to be announced when the implementation date is announced)

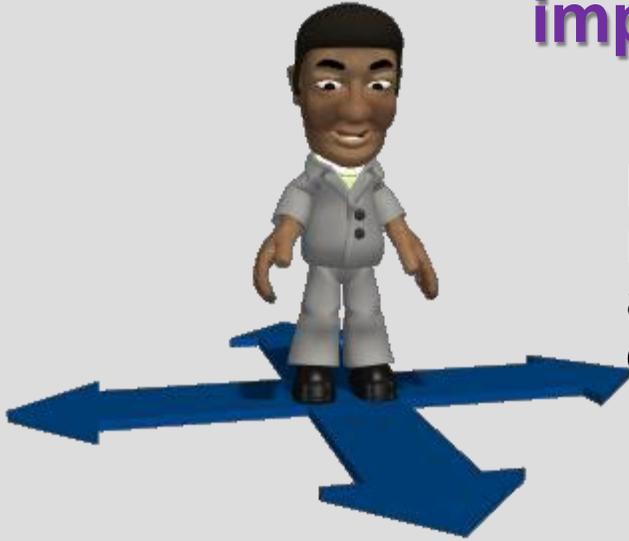


Those in Transition who have not completed the RP:

Members in process of attaining RP on implementation date:

If member has completed *two or more* parts of then-current registration exam (other than the open book part), may attain RP status by completing then-current registration exam in accordance with time limits then in effect.

Members in process of attaining a PRP on the implementation date are covered by an approximately 2 year grace period since they already have the RP credential.



After the grace period:

- ✓ In order to be qualified to attain PRP thereafter, a new candidate will be required to first go through new process to attain an RP, then new process for PRP.
- ✓ A grandfathered RP who fails to complete new process for attaining RP, *will not lose RP status* as long as s/he continues to fulfill requirements for renewal.
- ✓ However, s/he can't go on to earn the PRP until successfully completing the new RP process.





The **The New RP** Process
Process Step One—
Multiple Choice

Presented by
Gayla Stone, PRP
Commissioner





Introduction to the New RP Assessment

There are Three Steps with parts in Steps One and Two. Each part must be successfully completed before the next part, and each Step must be successfully completed before the next Step. At every evaluation point, retakes and feedback are available to gain skill and maximize final success.

- ✓ **Step One- A series of eight multiple choice tests taken online emphasizing knowing and applying the rules in the Criteria for Credentialing Booklet for RP Step One.**
- ✓ **Step Two- A series of written assignments with an emphasis on the things a parliamentarian does outside of meetings.**
- ✓ **Step Three- A live online conference with candidate and two evaluators where the candidate demonstrates skill as a parliamentarian in a simulated meeting.**



How the new Step One will be different from our current system of assessment:

- **There will be eight tests each on a different topic with the rules being tested on that topic provided in the Criteria for Credentialing booklet.**
- **While there will be some factual questions that only test knowledge of the rules, there will be a new emphasis on application of the rules.**
- **The candidate will successfully complete each small part of the assessment before continuing to the next part. If the candidate is not successful on any piece, a different version of that piece may be retaken so that success is achieved.**



How the new Step One will be different from our current system of assessment:

- All eight tests will be provided online with feedback at the end of each Part. These tests will be completed using the Honor System without proctors whenever and wherever the candidate chooses.**
 - The candidate may not use any references for Parts 1-7. These are questions that a parliamentarian should know from memory. For Part 8, referring to RONR or RIB or other resources is acceptable since these will be questions that only happen infrequently in meetings.**
 - Although there will be a record of the time taken for each Part, only Part 8 will have time limits of two minutes for each question.**
- 

Step One concentrates on objective testing of basic information and can be completed online using new Schoology software.

- **There will be eight multiple choice tests with 40 questions on each test.**
 - **Each test will cover one area of parliamentary knowledge and will be completed in order of increasing knowledge.**
 - **The exact references to the rules to be included on each test are provided in the credentialing booklet.**
 - **The test will be scored immediately after completion, and references to the rules will be provided for any missed questions.**
 - **If the candidate is not successful on any part, there will be opportunities to take another similar test.**
 - **Each part must be successfully completed before going on to the next part.**
- 

Comparison of Current Questions with New Questions

Actual question from the current 1200 RP question bank that only refers to the rule not the application:

Some assemblies provide in their rules for the automatic referral of all main motions to specified standing committees:

- A) Dealing with all classes of subjects**
- B) Dealing with certain classes of subjects**
- C) After a certain number of amendments has been proposed**
- D) Unless the subject deals with financial obligations**

2+2=4

We decided to save some less often used topics for the PRP

For Example, the rule for this question from the current RP question bank will not be used in the current system. We have identified exactly which rules need to be learned for each part of the RP assessment.

A variation of the motion to commit that is usually most suitable for ordinary societies whose meetings are not large is the motion to

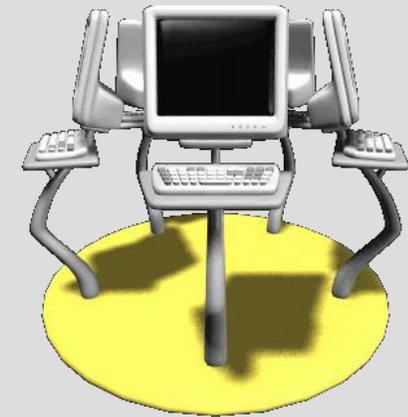
- A) Go into executive session**
- B) Go into a committee of the whole**
- C) Go into quasi committee of the whole**
- D) Consider informally**

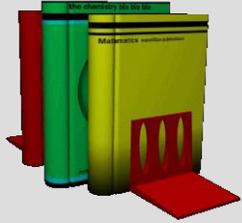


Sample New Question with more emphasis on application

The main motion pending before the monthly regular meeting of the Alpha Club is whether to buy a new computer and a new desk for the office. Nan Nod wants the desk, but she really doesn't think the expense of a new computer is worth it. What motion can she make so that she can vote for the desk but not for the computer?

- a) Divide the Question**
- b) Division of the Assembly**
- c) Point of Order**
- d) Consideration by Paragraph or Seriatim**



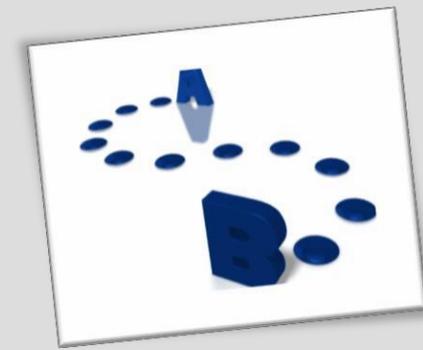


Another Sample emphasizing application

At the monthly meeting of the Book Lovers Association, the assembly voted to donate a bookcase filled with classics to the local elementary school using the services of the Best Builders Company. Next month, Camille Craven moves to amend this by striking out Best Builders Company and inserting United Carpenters. She has had some negative experiences with the Best Builders and some great ones with United Carpenters. May she explain these experiences as she speaks in favor of the amendment?

- a) Yes, debate on Amending Something Previously Adopted may go into the merits of what is proposed.**
- b) No, she is clearly biased in her opinion, and must limit her comments to objective matters.**
- c) She may not engage in debate at all except to propose her amendment.**
- d) Since the motion was already adopted at the last meeting, the chair should declare her amendment out of order.**

Topics of the RP Step One Parts:



- ✓ Part one: Motions in General and Main Motions
- ✓ **Part two:** Subsidiary and Privileged Motions
- ✓ **Part three:** Incidental Motions and Motions that Bring a Question Again Before the Assembly
- ✓ **Part four:** Conduct in Meetings
- ✓ **Part Five:** Voting, Nominations and Elections
- ✓ **Part Six:** Being a Professional Parliamentarian, Serve as a Professional Parliamentarian in Meetings and Teaching
- ✓ **Part Seven:** Boards and Committees and Writing and Interpreting Bylaws
- ✓ **Part Eight:** Selection from all topics where “Consult references” is indicated by a letter (C) in the Criteria for Credentialing booklet.

All of the rules being tested on each part are listed in the Criteria for Credentialing booklet with page and line numbers in *RONR* or *RIB* or sometimes to pages in NAP publications *Professional Practices in Parliamentary Procedure* and *Parliamentary Playbook*.

Each Part is one test and must be successfully completed before moving to the next Part.

Why this is a good system

system The Commission is committed to providing the most accurate system of assessment possible where

system of assessment possible where

Everyone has an opportunity to succeed because

- Each step is small and only requires learning very specific rules.
- Candidates don't move on to the next part until they are successful at the last one.
- There are ample opportunities to retake parts.
- Feedback is given to improve performance on retakes or next part.
- There are no "unknowns." Every candidate will know exactly what to expect.

The RP will be more meaningful because

- It will reflect what is currently happening in the real world.
- The assessments will require actual use of the rules not just memorization of them.
- Only those rules that need to be memorized will be tested that way. Other rules will be tested with use of the appropriate reference material



The New RP Process Step Two—Written Assignments

**Presented by
Rosalie Stroman, PRP
Commissioner**



Overview of Step Two Requirements

- ✓ **Step Two consists of a series of five Parts which emphasize things that a parliamentarian does outside of meetings. The Parts must all be successfully completed in sequence, and each Part must be completed before the next Part is attempted.**
 - ✓ **All of these Parts are completed at home and submitted in writing to the Evaluators who will provide feedback on each test in each Part. Any test that is deficient may be repeated with a new version on the same topic until success is achieved.**
 - ✓ **Some of the tests will be assigned while for others there will an opportunity for the candidate to choose from options.**
 - ✓ **Candidates will be provided with Scoring Guides for each test and sample questions and answers while they are preparing for the test. The actual test questions will be similar to the sample, but they will not be the same questions.**
 - ✓ **Candidates are expected to use whatever reference material they would properly use when serving clients in real world situations.**
- 

The Five Parts in Step Two

- Part 1:**
- I. Draft a resolution.
 - II. Answer three short answer questions
 - III. Essay on primary amendments
 - IV. Essay on Organization and Conduct of Meetings
 - V. Essay on Governing Documents

- Part 2:**
- I. Interpret Bylaws
 - II. Write four brief scripts

Part 3: Major Project.

Part 4: Teaching

Part 5: Ethics and Business Practices



The Details for Step Two

Very detailed instructions about what is required for each test in each part will be provided to the candidate.

This will include:

- 1. The exact requirements for each test in that part.**
- 2. The options when the candidate has a choice.**
- 3. The rules that are being assessed for each test with reference and/or RONR page and line number.**



The Details for Step Two

Continued



4. **A copy of the scoring guide that will be used. An example of the scoring guide will be provided.**
 - a) **Scoring guides indicate all the things that the evaluator is looking for.**
 - b) **Scoring guides indicate the number of points that will be awarded for each competency shown in the answer.**
 - c) **The total number of points required to be successful in each test will be indicated. (*Please notice that this will vary based on what is being evaluated.*)**

5. **A sample test will be provided for each test including an excellent answer with scoring guide filled in as an evaluator should do this.**



The New RP Process
Step Three - Meeting
Simulation

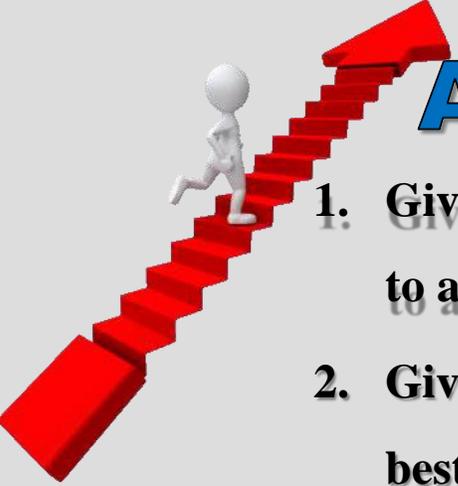
**The New RP Process
Step Three - Meeting
Simulation**

Presented by

Gail Knapp, PRP

Commission Vice Chair





Aspirational Goals for Step Three

- 1. Give each candidate an opportunity to demonstrate that they are sufficiently skilled to be able to apply their knowledge of RONR to a simulated real life situation.**
 - 2. Give the evaluators an opportunity to provide feedback that will help the potential RP do the best job possible when they are actually offering their services as a professional.**
 - 3. Make this assessment as comprehensive as possible including a wide variety of situations and rules where the candidate must respond immediately just as they must if they are serving a client in an actual meeting.**
 - 4. Make this assessment readily available and at reasonable cost while still accomplishing the other goals.**
 - 5. Provide maximum opportunity for retesting for anyone who needs or requests this.**
 - 6. To have as objective a measure as possible of the candidate's actual skill level.**
 - 7. To assist all candidates to achieve their goal of becoming a Registered Parliamentarian if they are willing to do the knowledge and skill development required.**
-

The Plan for Step Three

1. The candidate who has completed Step Two will register for a testing time and date.
2. Two trained evaluators will be assigned to the test that will be online using Adobe Connect in real time.
3. One of the several video meeting options that will be created will be shown on a screen to the two evaluators and the candidate being tested.
4. The video will have a chair and members of a fictional organization with an agenda for the particular meeting being held.
5. The candidate will have been provided with the bylaws and meeting agenda before the test. The candidate will also have an opportunity to ask questions about the organization or the issues on the agenda before the actual test begins.



The Plan for Step Three Continued

5. The candidate will also be told the number of questions that the chair will be asking him/her during the video and the number of procedural errors that the candidate is expected to identify and correct.
6. The video will be played and paused whenever the chair asks a question or the candidate interrupts to advise the chair.
7. The two evaluators will use provided score sheets to give points for correct responses. The scoring sheet will be provided to the candidate before the test.
8. The candidate will be given feedback on their answers.





Alpha and Beta Testing of Steps One, Two and Three

**Presenter: Dr. Frances Jackson, PRP
Commissioner**



Alpha Testing Progress



- 1. What is Alpha Testing?**
- 2. How were the testers identified?**
- 3. What are the testers providing for us?**
- 4. What did we do with the data they have created?**
- 5. Alpha testers have completed testing initial parts of Step One.**
- 6. We have now completed writing all of Step One.**
- 7. The Commission has approved the questions for all 8 parts of RP Step One, subject to future modifications based on analysis drawn from alpha and beta testing.**

Alpha Testing

Many already credentialed NAP members have given us hours of assistance on drafting committees to write questions for Part One and as Alpha Testers for the first tests.

We will be asking them to help us again to test the rest of the Step One questions. Any NAP member with an RP or PRP credential who is willing to help is eagerly sought. The more good feedback we have, the better our tests will be.

Thank you!!



Email your interest to Gail Knapp at gail.knapp1@gmail.com



Beta Testing

- **Soon after the Alpha Testing for RP Step One is complete, Regular NAP members who are willing to help perfect the new system while attaining their RP credential will be asked to begin Beta testing.**



A Statement of Commission Values:

- We are doing everything systematically, carefully and using the most up to date psychometric tools.
- We are doing Alpha and Beta testing of each assessment before it is implemented.
- The members of the Commission are dedicated to making sure that every “T” is crossed and every “i” is dotted.
- We have included a total of over 65 credentialed NAP members who have so far volunteered to make this the best assessment we can possibly have. And we are very grateful for their help.





Working on Success

- 1. Because the candidate will only complete one Part at a time, and will receive feedback on that Part before progressing to the next Part, the Commission believes that learning the needed skills will be easier.**
- 2. Retesting is available for any Part or test within a Part that achieves fewer points than required. Only tests that do not earn enough points for success will need to be repeated.**
- 3. The tests and Parts are designed to build on earlier skills and to apply the rules mastered in Step One to simulated real life situations. That is why they must be completed in the designated order.**
- 4. All tests in each Part must be successfully completed to progress to Step Three. The Commission believes that once the candidate has completed all of Step One and Step Two s/he should be adequately prepared for the demonstration of skills required in Step Three.**



What Is Next?

- 1) **The Commission has already completed and approved all of the questions for Step One, subject to future modifications based on Alpha and Beta testing. The final parts will be placed in the Schoology program and available to complete testing following the NTC.**
- 2) **Previous Alpha testers for the next questions will be contacted to see if they are willing to do more tests.**
- 3) **New Alpha testers are being recruited now. Let us know if you are interested!**
- 4) **Evaluators for Step Two are currently being recruited and training for evaluators was begun at this NTC.**
- 5) **Negotiations with videographers has begun, and scripts are being written for Step Three.**
- 6) **Beta testing with actual candidates for the RP credential is expected to begin in early 2019.**



In Conclusion

**We are happy to
answer your
questions!**



The Five Parts in Step Two

- Part 1:**
- I. Draft a resolution.
 - II. Answer three short answer questions
 - III. Essay on primary amendments
 - IV. Essay on Organization and Conduct of Meetings
 - V. Essay on Governing Documents
- Part 2:**
- I. Interpret Bylaws given a set of bylaws and a question from the president about them.
 - II. Write four brief scripts based on assigned topics
- Part 3:** Major Project. Candidate will choose ONE of the following topics:
- I. Organization and conduct of meetings
 - II. Nominations and elections
 - III. Serving as a parliamentarian
 - IV. Bylaw Amendments
 - V. Boards and Committees
- Part 4:** Teaching. Candidate will choose ONE of the following topics:
- I. Main motion
 - II. Concept of when issues are raised again
 - III. Responsibilities of officers
 - IV. Committees
 - V. Boards
 - VI. Procedure in committees and boards
 - VII. Procedure in conducting an election
- Part 5:** Ethics and Business Practices- assigned questions



Beta Testing

Soon after the Alpha Testing for RP Step One is complete, Regular NAP members who are willing to help perfect the new system while attaining their RP credential will be asked to begin Beta testing.

The NAP Board recognizes that since this is a test, and there may be problems to be worked through as we start the new system, any candidate who is willing to volunteer will not have to pay the usual testing fee. And if they are successful, they can be awarded the RP designation upon completion of the process.