



Taskforce – Badges and Achievements

Report to the Board April 2024

Report to the Board on Achievements and Badges

Taskforce Members: Cameron Brister, Tracy Hardin, Heather Johnson, Jason Thomas, Karl Palachuk (chair)

In attendance: Nicole Singleton (Executive Director)

We met several times and produced the following proposals, which we would like the Board to accept. We propose that the following be implemented as soon as practical. While these might be rolled out one at a time for practical reasons, we think they should be announced as a group.

The first proposal is a set of Badges and Achievements. The second proposal relates to the terms used regarding members and evolved from the discussion of the “Professional” achievement. The third proposal is focused on the future of the organization.

Note: At this point, the Taskforce would like to continue meeting monthly (rather than weekly) to assist in working out the details of implementation for these proposals.

Proposal One: Badges and Achievements

1. **Leader** Badge – This is an individual badge

- For those who serve on the board of directors, committees, and special taskforces.
- Designation of most recent year served (e.g., 2024).
- Verification:
 - Process for Elected Leaders: Tracked by staff (Bolder)
 - Verification for Elected Leaders: Tracked by staff (Bolder)
 - Process for Appointed Leaders: Tracked by staff (Bolder)
 - Verification for Appointed Leaders: Communication with committee chairs; tracked by staff (Bolder)



2. **Client Endorsed** Badge – This is a company badge

- For companies that have uploaded two or more client letters of recommendation.
- Designation for most recent year achieved. Can display up to three years. For example, a 2024 Client Endorsement will not be displayed after December 2026.



- Note: We have 87 of these folks today.
 - Verification:
 - Process: Fill out form and upload documentation
 - Verification: Simple verification by staff reviewing uploaded documents and tracking in spreadsheet
3. **Founding Member** Badge – This is both an individual and vendor badge
- Only paid members and vendors are eligible to display this.
 - Verification:
 - Process: Joined Prior to 1/1/2023
 - Verification: Self-defined by first membership
4. **Ambassador** Badge – These are individual badges
- These badges require special designations. Designations are:
 - Recruitment – For bringing in five or more new paid members in the last twelve months
 - Volunteerism – For activity over and above as a volunteer
 - Social Media Hero – For great society promotion on social media
 - Future sub-type = Community Contributor – For active participation in our forums. Future achievement.
 - Verification:
 - Process: Nominated by leadership, another paid member, or self. Nominations ongoing. Badges are awarded quarterly at next member meeting. Recruitment verification will require some implementation work by Bolder staff. There will be forms and specific criteria for various types of Ambassadors.
 - Verification: Will vary by sub-type. To be defined
5. **Continuing Education** Badge – This is an individual badge
- Available to paid members who attend NSITSP webinars. Zoom tracks registration and actual attendance. Members must attend the live webinar in order to earn CE hours.
 - We can set a minimum number of hours/webinars expected to be maintained over the previous twelve months. For example, five hours of webinar hours is required to earn and maintain this badge.
 - Verification:
 - Process: Tracked by staff (Bolder)
 - Verification: Tracked by staff (Bolder)



6. **Professional** Badge – This is a company badge

- Prerequisites:
 - Must have achieved the Client Endorsed badge
 - Have a Code of Ethics posted on their web site (NSITSP or another COE). Applicant will provide a link for verification.
 - Agree to follow the NSITSP Code of Ethics posted on our web site. Applicant will provide a link for verification.
- Full Professional Status requirements:
 - Proof of Insurance - Liability (upload)
 - Sec State - EIN or TIN [proof of incorporation or registration as a business] (upload)
 - Proof of Workers Comp (upload)
 - Business License (upload)
 - Future years might require E&O and Cybersecurity Insurance
- Verification:
 - Process: Fill out form and upload documentation
 - Verification: Simple verification by staff reviewing uploaded documents and tracking in spreadsheet. For example, Proof of Insurance could be a certificate from the insurance company.

----- End of Proposal One -----

Proposal Two: Use of the Term *Professional*

Background: We currently refer to paid members as Professional members. And we tend to casually refer to members as professional members. As we discussed the name for the Professional badge above, it became clear that this is an opportunity to clarify what we mean by that term.

1. Going forward, we will refer to members as Paid and Free members. Stop referring to paid members, or all members as “Professional” members.
2. New paid members will be referred to as Provisional members until they complete the requirements for the Professional badge.

Notes: This change will take a little time, and will require a thorough change of terminology used in our web site copy. The current Free/Professional members will become Free/Paid members. Professional companies will have the Professional badge designation, as will their associate members.

Bolder Strategies is empowered to work out the details, with advice from the Governance Committee, the Board of Directors, the web developer, and other NSITSP bodies as appropriate.



----- End of Proposal Two -----

Proposal Three: Professional Development Moving Forward

The Taskforce agreed that the next step for our organization on the topic of “achievements” is to develop a program for recognizing and acknowledging continuing education and Professional Development of our members. The details need to be worked out, of course, but we ask the Board to approve the following:

1. The taskforce that started out as the “Badges and Achievements” Taskforce will continue and will be renamed to the Professional Development Taskforce.
2. The Professional Development Taskforce will be charged with developing a program for awarding Continuing Education credits. This will involve ...
 - a. Setting criteria for education providers that wish to be acknowledged as providers of continuing education classes and programs for NSITSP members.
 - b. Determining vetting processes and fees for these continuing education providers. This may include discussions and collaboration with these providers.
 - c. Determining the mechanisms for verifying CE hours completed, tracking, etc.
 - d. Working with the Executive Director’s office for implementation and tactics.
 - e. Reporting to the Board on all activities and seeking approval for important changes to the CE program going forward.

----- End of Proposal Three -----