

February 14, 2024  
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Program Manager

In-Progress = Yellow  
Complete = Green  
With the Board = Blue  
Needs Attention = Red

Acronyms:

PWG- Program Work Group  
ACC- Accreditation and Certification Committee  
ICE- Inspector Certification Exam  
ADWG- Academy Development Work Group  
LMS- Learning Management System  
TIRE- Technical Information, Research, and Education  
PM- Program Manager  
IRMC- Insurance and Risk Management Committee  
AR- Administrative Reviewer  
TR- Technical Reviewer

PRM- PR and Marketing Work Group  
API- Adventure Park Insider  
VARTTF- Vendor Accreditation Reviewer Training Task Force  
VAP- Vendor Accreditation Panel  
OR- Operation Reviewer  
CEU- Continuing Education Units  
QCPTF- Qualified Course Professional Task Force  
TF- Task Force  
VAPDTF- Vendor Accreditation Program Design Task Force

Extra Projects			
Project	Summary	Progress	Needs
Program Work Group	TOR was put together and reviewed/approved by the board. We had two meetings with the Program volunteers to provide information, updates, and opportunities to ask questions. We opened the application and have recently closed it and reviewed the applicants. These applicants have been reviewed, and we have put together a transition plan that was presented to the ACC. We will start the transition process once all volunteers are made aware of the plan.	In-progress	
Program Transition	<ul style="list-style-type: none"> <li>Step 1: Initial call to do introductions and to share information about filling out documents such as the Conflict of Interest / Tech Use forms.</li> <li>Step 2: Transition current Task Forces to be under the Program Work Group (Qualified Course Professional Task Force, Universal Portfolio Task Force, Vendor Auditor Training Task Force)</li> <li>Step 3: VAP can be transitioned out as soon as the review of all Annual Reports are completed.</li> <li>Step 4: The Operation Accreditation Panel can transition as soon as March.</li> <li>Step 5: The Inspector Certification Panel will be the last of the Panels to transition out. This is because of the higher volume of renewals for this year. The strategy discussed was to have an ICP member paired with a PWG member to review Level 2 Professional applications together. Keeping in mind that the PWG member is learning, in the end, the PM will follow the recommendation of the ICP member to ensure the forward motion of the application. This would</li> </ul>	In-progress	

	<p>happen through the Spring Testing Event to ensure multiple opportunities for practice and shadowing. After the Spring Event, the ICP will transition out, and the PWG will transition into the role of reviewing applications with the PM in an effort to be ready for the Summer Testing Event.</p> <ul style="list-style-type: none"> <li>• Step 6: Through all the prior steps, the Chair of the ACC and the Program Manager will keep in communication with each other to gauge progress. Following the transition of the final Panel, the Program Manager, the Chair of the ACC, and the Board Liaison will collaborate to determine the final steps for a thorough handoff and the subsequent dissolution of the ACC.</li> </ul>		
<b>Website Translations</b>	<p>Working with Jason and his team on getting translations for Inspector Certification on the ACCT Website.</p> <ul style="list-style-type: none"> <li>• Spanish</li> <li>• Malay</li> <li>• Korean</li> <li>• Japanese</li> <li>• German</li> <li>• Hindi</li> <li>• Chinese</li> </ul> <p>With changes in the program (Insurance), we have needed to do additional translations</p>	<b>In-progress</b>	Consider putting a translation group together to work on extending our translation scope and abilities
<b>LMS</b>	<p>ICE: I am still in the process of moving the current ICE Prep Course content to the LMS. The Academy Development WG (ADWG) has been assisting. Staff will get the ADWG in the LMS to assist with building and testing.</p> <p>Operation Reviewer Training: The classroom portion will shift to the LMS system after conference in-person training</p>	<b>In-progress</b>	
<b>Programs/TIRE Project</b>	<p>Once the current ICE Prep is in the LMS, the TIRE committee will assist the PM with the new Standards Education Course that will replace the current ICE Prep</p>		

<b>Vendor Accreditation Program</b>			
<b>Current Accredited Vendors: 34</b>			
<b>Applications in progress: Paused</b>			
<b>Project</b>	<b>Summary</b>	<b>Progress</b>	<b>Needs</b>
<b>Vendor Agreement</b>	The agreement has been reviewed by ACCT Legal, Insurance, IRMC, and the Board. Comments are being reviewed, and a decision should be made soon.	<b>With the Board</b>	<b>Vote</b>
<b>Vendor Accreditation Policy</b>	Rohan, Mike Smith, and I put together the Vendor Accreditation Policy as requested by the Board. This is currently being reviewed by IRMC and the Board. A decision will be made soon	<b>With the Board</b>	<b>Vote</b>

<b>Vendor Accreditation Approval Package</b>	The Vendor Accreditation Approval Package was sent to the ACC for their approval by the VAPDTF. The ACC approved it and sent it to the Board. The package has been reviewed by the board. The Board has accepted the content and approved staff to start with education and Vendor Auditor Training. The package is still with the board, waiting for any other supporting approvals.	<b>With the Board</b>	
<b>Application Fees</b>	The application cost has not changed! However, it has been reallocated to correlate with the new model. \$200 for the application fee and \$300 per service area. (1 service area = \$500, 5 service areas = \$1700)	<b>With the Board</b>	<b>Vote</b>
<b>Auditor Designation</b>	After initial conversations with Insurance and our Accountant, we have been working towards Vendor Auditors being Contract Laborers. In the past month, ACCT has received information about Federal changes with Contract Laborers. ACCT leadership is reassessing and soliciting information and designation suggestions from IRMC, insurance representation, our accountant, and current Accredited Vendors.	<b>With the Board</b>	<b>Vote</b>
<b>Auditor Compensation</b>	Staff broke down the audit process and analyzed the past role with ARs and TRs, and compared it to the new program and how the shift in work will streamline the audit process. Hours per audit and compensation have been sent to the Board for their review and feedback.	<b>With the Board</b>	
<b>Education</b>	(This is public education), I am currently working on videos about the application process from start to finish that will go on the ACCT Vendor Accreditation web pages. Working with volunteers, we will add education, breaking down each service area.	<b>In-progress</b>	
<b>Marketing</b>	PR M drafting release information that will be sent out once the program is approved. We are waiting for a brand/logo. I have a marketing budget that will be used for API. I also want to draft letters to regulators	<b>In-progress</b>	
<b>Updates to Website</b>	I am almost done with the new web pages that will replace the old pages on the ACCT website. These pages will look similar to other Program pages	<b>In-progress</b>	
<b>Community Engagement</b>	Still trying to keep in contact with past inquiries while the updated program is nearing the end of development. We are up to potentially 16 companies interested in the new program.	<b>In-progress</b>	
<b>Vendor Auditor Training</b>			
<b>Training Syllabus</b>	This was submitted to the Board with the Vendor Accreditation Approval Package as requested by the Board.	<b>With the Board</b>	
<b>Training Curriculum</b>	This has been drafted and is with the VARTF. The curriculum correlates with the LMS. This is being worked on with the VARTF	<b>In-progress</b>	
<b>Training Content</b>	This is being worked on with the VARTF	<b>In-progress</b>	
<b>Vendor Auditor Guide</b>	This is being worked on with the VARTF	<b>In-progress</b>	

<b>Industry Information</b>	This is dependent on what the designation of Vendor Auditor will be, but I am preparing what announcing the job to the industry will look like and sending information to Accredited Vendors, and past TRs.	<b>In-progress</b>	
<b>Acceptance of Application</b>	This is dependent on when the application fees are approved, but I am preparing to open the application to the public once we are officially able to do so.	<b>In-progress</b>	
<b>Vendor Accreditation Panel</b>			
<b>Annual Reports</b>	The VAP has reviewed Annual Reports. Emails are actively being sent for questions, clarifications, updates to reports, and submission as final.	<b>In-progress</b>	
<b>Upcoming Reaccreditation</b>	10 companies that are up for reaccreditation in 2024. I would like to schedule a Zoom call with these 10 after the conference to help answer questions and assist in getting ready for the new process.	<b>Not Started</b>	

<b>Operation Accreditation Program</b>			
<b>Current Accredited Operations: 21</b>			
<b>Applications in progress: 5</b>			
<b>Project</b>	<b>Summary</b>	<b>Progress</b>	<b>Needs</b>
<b>Forms</b>	Transferring forms to Adobe for better user experience	<b>In-progress</b>	
<b>Tutorials</b>	Updating tutorials and content on the website	<b>In-progress</b>	
<b>OA Manual</b>	Updating Operation Accreditation Manual with more description and to look similar to the Vendor Accreditation Applicant Manual	<b>In-progress</b>	
<b>OA Procedures Manual</b>	Once Vendor Accreditation is complete, I will be writing a procedures manual for this program.	<b>Not Started</b>	
<b>OR Guide</b>	Review and revision of Operation Reviewer Guide	<b>In-progress</b>	
<b>OR Training</b>	Hosting an in-person OR training at the conference on Sunday. We have 6 participants.	<b>In-progress</b>	
<b>Marketing</b>	We had a quarter-page ad in API's print edition. I will work with PRM and Brittany to continue putting content together. The potential target markets are travel and parent magazines.	<b>In-progress</b>	
<b>Operation Reviewer</b>			
<b>Approved Operation Reviewers: 27</b>			
<b>Renewals</b>	We have shifted renewals from every year to every 2 years. This will still require 32 CEUs.	<b>Complete</b>	

<b>Training</b>	Working on getting the classroom portion of OR training in the LMS and hosting the scenarios and conversation portion in-person or virtual.	<b>In-progress</b>	
<b>Reviewer Report</b>	One of our Operation Reviewers adjusted our Review report to be more user-friendly.	<b>Complete</b>	
<b>Operation Accreditation Panel</b>			
<b>Application Review</b>	The Panel has been assisting with the review of applications.	<b>On-going</b>	
<b>Reaccreditation</b>	We have been reviewing the Accredited Operation Reaccreditation process to ensure overall success with those companies that will be going through the process.	<b>On-going</b>	

<b>Inspector Certification Program</b>			
<b>Current Inspectors:</b> Pro- 172 In house- 48			
<b>Project</b>	<b>Summary</b>	<b>Progress</b>	<b>Needs</b>
<b>Education</b>	I have worked with identifying content at the conference that could be recorded, and I am working with different groups to identify educational content that can be added to the LMS.	<b>On-going</b>	
<b>Forms</b>	Transferring forms to Adobe for better user experience	<b>In-progress</b>	
<b>Test Consistency</b>	Reviewing exams to ensure virtual exams match the in-person exams.	<b>Complete</b>	
<b>Application Review</b>	I have put together a Google form that will assist in application review to streamline the process and to keep consistency.	<b>Complete</b>	
<b>Florida Support</b>	Melissa, Korey, and I have been working with different individuals to create a plan that will assist ACCT Professional Inspectors with the Qualified Inspector qualifications. A letter has been drafted and reviewed by Florida Regulators and their legal representation. We have our final review and will be sending information out to the community.	<b>In-progress</b>	
<b>Insurance</b>	The Insurance Attestation has been added to the Supervisor Attestations and the application.	<b>Complete</b>	
<b>Prep Course</b>	See Extra Projects		
<b>Inspector Certification Panel</b>			
<b>IC Guidelines</b>	The panel has been working on updating the guidelines. We are in the final revision. This will be used to help the PWG.	<b>In-progress</b>	

<b>Non-Conference CEUs</b>	The panel has been reviewing submitted Non-Conference CEUs. I have been keeping track and making a list that can be published for people to reference.	<b>On-going</b>	
<b>PWG Assistance</b>	See Extra Projects		

<b>Other Related Groups</b>			
<b>Project</b>	<b>Summary</b>	<b>Progress</b>	<b>Needs</b>
<b>QCPTF</b>	This Task Force has been meeting twice a month, every 2nd and 4th Thursday. Our group has confirmed the CORE definition and specific requirements for each discipline. These have been sent to the ACC for review before Conference Presentations are done. This TF will have 1 workshop and two lunch forums to gather any residual feedback. This group is hoping to submit for approval within the near future.	<b>On-going</b>	
<b>Universal Portfolio</b>	This TF will be on hiatus until the QCP task force has updated QCPs. I am hoping that we can start getting this group back up after the conference to work with the QCP group for information and pass it off once QCPTF is complete and approved		
<b>TIRE</b>	I have been Staff/ACC liaison to this group. See New Projects above and the TIRE Board Report	<b>On-going</b>	
<b>Accredited Operations Affinity Group</b>	The Accredited Operation Affinity Group meets on the first Thursday of the month. They have been meeting about specific topics they would like to discuss as a group. They have created an agenda for the Conference symposium and are looking into a Fall symposium in Singapore.	<b>On-going</b>	
<b>PRM</b>	I have been working with PRM on potential marketing plans for Vendor Accreditation and will soon bring the topic of Operation Accreditation marketing back up soon.	<b>On-going</b>	
<b>PVM Symposium Planning Group</b>	Dick has been doing a great job trying to get the group to add input on their symposiums. Registration was open and has already closed. This group still needs to plan some topics and logistics pieces.	<b>On-going</b>	