

Report of the Professional Development Committee

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Reference
 Key Number

400 INTRODUCTION

This is the report of the Professional Development Committee (hereinafter referred to as "Committee" or PDC) for the 90th Annual Meeting of the National Conference on Weights and Measures (NCWM). It is based on the Interim Report offered in NCWM Publication 16, testimony heard at public hearings, comments received from the Regional Weights and Measures Associations and other parties, the Addendum Sheets issued at the Annual Meeting, and actions taken by the membership at the Voting Session of the Annual Meeting. The informational items presented below were adopted as presented when the Committee’s report was approved.

Table A identifies the agenda items in the Report by Reference Key Number, Item Title, and Page Number. The item numbers are those assigned in the Interim Meeting Agenda. A voting item is indicated with a “V” after the item number. An item marked with an “I” after the reference key number is an information item. An item marked with a “D” after the reference key number is a developing issue. The developing designation indicates an item has merit; however, the item was returned to the submitter for further development before any action can be taken at the national level. An item marked with a “W” was withdrawn by the Committee and generally will be referred to the regional weights and measures associations because it either needs additional development, analysis, and input or does not have sufficient Committee support to bring it before the NCWM.

Note: The policy of NIST is to use metric units of measurement in all of its publications; however, recommendations received by the NCWM technical committees have been printed in this publication as they were submitted and may, therefore, contain references to inch-pound units.

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**Details of All Items
(In Order by Reference Key Number)**

401 EDUCATION

401-1 I National Training Program (NTP)

Source: The Committee

The Board of Directors established the Committee at the 2003 NCWM Annual Meeting in Sparks, Nevada. The first critical charge given to the Committee was to develop a national weights and measures professional development program in cooperation with its partners including:

- State and local weights and measures departments;
- Private industry at all levels; and
- Technical advisors from NIST Weights and Measures Division and Measurement Canada

The NTP will address the following tasks in order of priority:

1. The education and professional development of weights and measures officials and the promotion of uniformity and consistency in the application of weights and measures laws and regulations;
2. The education of industry personnel with regard to weights and measures laws and regulations, including all areas from device manufacturer to service technician;
3. Quality standards for weights and measures activities and programs;
4. Safety awareness for weights and measures-related activities; and
5. Development of a firm partnership with the state and local weights and measures departments, private industry at all levels, and the NCWM. It is critical that NIST Weights and Measures Division (NIST WMD) partner with the Committee and, where appropriate, provide technical advice. Measurement Canada is also encouraged to participate in Committee activities.

Discussion: The Committee began developing the concept of a National Certification Program for weights and measures officials during the 2004 NCWM Annual Meeting (see developmental Item 401-8 below). In December 2004 several Committee members met in Harrisburg, Pennsylvania, to further develop the Committee’s overall strategic direction of a National Certification Program. The participants agreed that the NTP should take the following directions:

- The training responsibility should fall directly on state and local jurisdictions.
- Administrator training must be added to the curriculum.
- The Committee should consider looking outside the NCWM for training and structure.
- The Central Weights and Measures Association (CWMA) will assist the Committee in determining what knowledge and prerequisites are required for three tiers of the NTP: beginning, intermediate, and advanced.
- The Western Weights and Measures Association (WWMA) recommended the Committee establish identifiable course outlines that would result in shorter training courses.

The strategic direction is summarized in Appendix A.

At the Annual Meeting comments from the floor indicated support for the Committee's direction on the item. Other comments indicated that the Committee should not lose sight of training of supervisors, managers, and service personnel. A recommendation was made to set parameters and benchmarks and let the states do the work in training the inspectors.

401-2 W Professional Development

Source: The Committee

Discussion: The Committee withdrew this item because the scope and content of this item is inherent in the tasks outlined in the information items on the agenda.

The Committee created and distributed an informational survey during the 2004 Annual Meeting to identify the needs of jurisdictions and to create a consensus position in the development of the National Training Program. The Committee reported the results of the survey at the 2005 Interim Meeting. The data showed that a Handbook 44 course was a top priority followed by a course on small scales. The state of California offered its support and the training material used in that state. The CWMA agreed that Committee's efforts to establish a training and certification program should be the first step of providing professional development for all NCWM stakeholders.

401-3 W Identify Partners

Source: The Committee

Identify appropriate roles in implementing an educational process for each of the partners (e.g., NCWM, state and local weights and measures jurisdictions, private industry at all levels, NIST Weights and Measures Division, and Measurement Canada).

Discussion: The development of a training program should follow the steps listed below:

1. Study training programs of outside agencies, as well as those of state and local jurisdictions.
2. Establish knowledge goals for weights and measures officials and administrators.
3. Develop curriculum based upon the findings and results of the steps 1 and 2.
4. Develop exams or tests.

The Committee moved "the development of training program steps" to Item 401-4 and withdrew this item.

401-4 I Create a Curriculum Plan

Source: The Committee

The Committee agreed the following steps must be addressed for the NTP to be viable:

- (a) Develop and maintain a curriculum plan in cooperation with our partners that establishes uniform and consistent training objectives for weights and measures professionals in all fields and at all levels.
- (b) Develop objectives of the curriculum plan representative of a consensus of our partners and organize those objectives by scope, sequence, and level of complexity to assist those developing the curriculum materials.

The development of a training program should follow the steps below:

1. Study training programs of outside agencies, as well as those of state and local jurisdictions.
2. Establish knowledge goals for weights and measures officials and administrators.

3. Develop curriculum based upon the findings and results of the steps 1 - 2 above.
 - (a) Coordinate the development of curriculum materials to be used in the delivery of training (i.e., lesson plans, digital presentations, slide shows, testing guides, etc.) using a variety of formats (e.g., self-study, traditional instruction).
 - (b) Consider creating a network of interested parties to establish priorities, share training resources, foster cooperation to reduce redundancy, and promote uniformity and consistency.
4. Develop examinations, quizzes or tests based on the content of the materials developed under Item 3.
5. Gather and share information from trainers on highly effective techniques, visual aids and other materials that have been used to facilitate learning. Use as many of these resources as available.

The Committee reviewed the notes from the NIST-sponsored administrators' workshops held in Denver, Colorado, and Baltimore, Maryland, and plans to explore many of these ideas.

Discussion: During the 2004 Annual Meeting, the Committee discussed the idea of using work groups to develop courses that could be used for self-study or for traditional classroom settings. The Committee agreed that the initial priority should be high profile devices (e.g., motor-fuel dispensers and retail computing scales). The Committee will study the survey results to determine the membership's needs and desires.

There were several recommendations submitted by the regional associations. The CWMA commented that the Committee should draw upon other sources, both external and internal, for establishment of curricula. The WWMA recommended the Committee review current training courses on the NIST website at <http://www.nist.gov/owm> to establish and identify various levels of training. They also suggested the Committee review and update all existing NIST training courses and post them on the NIST website. The Northeast Weights and Measures Association (NEWMA) recommended the Committee set standards for education that include provisions for field tests.

During the 2005 Interim Meeting the Committee received recommendations to develop course curriculum with specific learning objectives and develop tests to determine mastery of the learning objectives. The responsibility for providing training to meet the objectives would rest with the jurisdictions. It was also recommended the Committee develop tests to be administered at the end of each course. Upon successful completion of the tests, individuals would be issued certificates. Schemes for controlling the tests and preserving the integrity of the system would need to be developed.

At the 2005 Annual Meeting the State of New York indicated that it will provide the Committee with information on this subject.

401-5 W Curriculum Coordination

Source: The Committee

In order to achieve the goal of curriculum development, the Committee discussed the following:

- (a) Coordination of the development of curriculum materials to be used in the delivery of training (i.e., testing guides, digital presentations, slide shows, lesson plans, etc.) using a variety of formats (e.g., self-study, traditional instruction).
- (b) Creation of a network of interested parties to establish priorities, share training resources, foster cooperation to reduce redundancy, and promote uniformity and consistency.

The Committee should consider curricula from other sources to develop a National Training Program. The CWMA agreed that the Committee should draw upon several sources, both external and internal, for the establishment of curricula.

Discussion: Since this item had substantial overlap with the preceding item, the Committee withdrew it and placed portions of it in Item 401-4.

401-6 W Training Innovations

Source: The Committee

To achieve the objective of developing creative training innovations, the Committee agreed to gather and share information from trainers on highly effective techniques, visual aids, etc., that have been used to facilitate learning and to use as many resources as available. The Committee reviewed the notes from the NIST-sponsored administrators' workshops held in Denver and Baltimore and plans to explore many of these ideas.

The CWMA Professional Development Committee recommends focus groups be used to identify training innovations and that each group be assigned at least one person with teaching or training background to ensure different learning styles are recognized and utilized in developing the final product.

Discussion: The Committee incorporated some information from Item 401-6 into Item 401-4 and withdrew this item.

401-7 D Instructor Improvement

Source: The Committee

One goal of the Committee is to coordinate with all interested parties activities to improve the competence of instructors and the uniformity of delivery of the curriculum.

Discussion: The Committee concluded there are two parts of an instructor—improvement strategy. The first part is educating trainers in effective methods of instruction. A variety of courses and training methods are available from state, federal, and private sources to develop instructional skills and techniques. Jurisdictions are encouraged to seek out and send selected staff to this type of training.

The second area of instructor improvement is to provide trainers with the knowledge of the technical aspects of all types of devices. The Committee will look to NIST WMD for leadership and participation as a valuable asset in this aspect of training and recommends that WMD assume the task of providing the technical training of instructors. The Committee will look to WMD as a resource to consult with trainers and to work with the Committee on keeping the curricula current as changes to the Handbooks occur, new technologies are deployed, and emerging issues develop. The Committee invites discussion from WMD on this topic. The Committee decided this is currently a low priority for 2005. However, the item will be retained as a developing item.

At the Annual Meeting industry representatives offered continued support on training for the new weighing and measuring device technology. WMD indicated that they would continue to provide technical training for the trainers.

401-8 D Certification

Source: The Committee

The Committee believes that an NCWM certification program should be developed based on the curriculum plan with measurable levels of competency.

Discussion: The Committee agrees that weights and measures officials must pass written examinations to receive certification. Certificates could be presented at the Annual Meeting to administrators and weights and measures officials who complete training classes and pass the course examination. In 2004 Chairman Dennis Ehrhart expressed his support for certification and indicated the Board of Directors would consider requests to fund training. The Committee is exploring certification of weights and measures officials as a means to demonstrate competency.

The WWMA and CWMA submitted extensive comments and recommendations regarding this item prior to the 2004 NCWM Annual Meeting. The Committee has designated this item as developmental.

At the Annual Meeting the Committee considered and agreed to include the following proposal on state-issued certification.

State-Issued NCWM Certification Proposal

Background

The PDC strategic direction has established a plan for a certification program for individuals and programs. The Professional Development Committee has been charged with developing an NCWM certification program based on the curriculum plan with measurable levels of competency.

A full certification proposal was developed and submitted for consideration at the NCWM 2005 Interim Meeting. Questions were raised over the availability of NCWM resources needed to maintain a full NCWM certification program. Feedback from the membership in attendance showed there was interest in development of the state-issued certificate of competency since the states already have responsibility for maintaining training records and are ultimately responsible for the competency of inspectors in their jurisdictions. This proposal is for a state-issued certificate based upon a National certification testing program.

During the open discussion some members indicated they would prefer NCWM issue the certificates and the states be responsible for the training.

Implementation

Step One: Each State Director will identify a State Certification Coordinator (SCC) for its state to work with the PDC and NCWM. The SCC would be the main state contact and collection point for materials and information related to certification. The SCC would be responsible for:

1. Assisting the PDC in developing:
 - a. Test questions (or recommending work group members who could)
 - b. Test protocol
 - c. Certification criteria
 - d. Certification templates
2. Implementing certification testing in their state.
3. Maintaining confidentiality of testing and test materials
4. Scoring certification tests
5. Issuing state certificates
6. Reviewing their state's submitted questions annually for adherence to the handbook changes
7. Maintaining state certification files

Step Two: The PDC will establish work groups to identify core competencies and knowledge requirements for basic (beginning) and advanced (journey level) inspectors for a general W&M inspector, for specific devices and W&M disciplines as identified in the training outline already developed by the PDC. The PDC and SCC can work together to assist in establishing work groups for specialty areas to ensure the correct level of expertise.

Step Three: The work groups will develop certification tests and field competency verification methods to test the core competencies and knowledge requirements as established in step two. Allow members of the work groups to utilize a secure area of the NCWM website to conduct their work without having costly meetings or conference calls. Each work group would submit questions to be used in the development of the test that would demonstrate the core competencies and knowledge requirements. This will establish a pool of potential questions for the PDC and SCC to use in development of certification tests. Use the ISWM 900-Question model and others for "developing," "recycling" and "updating" test questions as needed. SCCs should review the questions they developed annually and update if necessary. This will ensure that as handbook requirements change all questions will remain current

and in agreement with the conference documents. Reviewing only a few questions should not be overly burdensome on any one jurisdiction or organization. Development of the tests must also include the testing minimums for certification of every test for each device and discipline for certification (i.e., must pass 75 % of the questions to be certified).

PDC would maintain a master list of questions for each test to be given, who submitted each question, when it was last reviewed and then generate the test questions using a random selection method. The test would be changed annually. Once a test has been developed, the PDC would submit the test questions (along with the answers) to the SCC for their use in certification.

Step Four: The PDC will establish confidentiality, testing and field verification protocol for the tests to ensure the integrity of the test and testing validity are maintained. This is crucial given the wide scope of testing and the need to offer testing in every state. This ISWM testing protocol and other successful testing procedures should be studied to build on current successes. PDC or BOD determines what, if any, involvement the NCWM will have in the actual printing and issuance of Certificates and what recognition, if any, the NCWM will give to certificate holders. The SCC in each state will be responsible for printing all testing materials and instructions, giving the tests, and grading the tests, the SCC must monitor to see that testing protocol is followed.

Certification program expected outcome: consistency of enforcement, uniformity, respect, integrity, and acceptance of end product. Inspectors will be able to compete in marketplace for fair wages and be recognized as professionals in their field.

Other things to consider:

1. Each state must also ensure field competency along with certification.
2. Should certificates be required to be renewed?
3. Should there be a fee associated with certification as a revenue source or to cover the basic cost of administering the test?
4. Should study guides or workshops be developed as a revenue source for the NCWM or as increased value to NCWM membership and attendance at meetings?

401-9 W NCWM Training

Source: Western Weights and Measures Association (WWMA)

Recommendation: The WWMA recommended that the NCWM establish and maintain a database of classroom training programs completed by individual weights and measures officials where the training uses NCWM courses (or equivalent) and certified trainers. The NCWM should also issue certificates to individual weights and measures officials for course completion.

Background: The WWMA recognized the value of formal training for inspection staff and the credibility these programs provide. Some jurisdictions have formal licensing programs for weights and measures staff and rely on informal programs. The WWMA recognized that the NCWM is a logical entity to provide standardized training and accreditation programs.

Discussion: The Committee acknowledges the comments from WWMA. Such comments will be taken under advisement during the formulation of any training effort. The Committee would like to know if NIST will participate in the NCWM training and certification program and would like to see a NIST liaison added to the Committee. The Committee would like to maintain NIST involvement with the National Training Program. NIST reported they have and will continue to develop training materials that will be made available for use in a wide variety of training classes. The standards used to inspect devices are technical; therefore, the training and development of these standards require a wide variety of technical expertise. NEWMA stated technical and administrative support for the Committee should come from NIST. The Committee will solicit partnerships with other interested parties.

During the 2005 Interim Meeting, it appeared there was a consensus among the membership that this should be a responsibility of the states. Based on that consensus, the Committee withdrew this item.

401-10 D Recommended Topics for Conference Training

At the 2005 Interim Meeting, the Committee recommended a number of topics for possible training seminars, round tables or symposia that would be suitable for presentation at the 2006 National Conference.

They are:

- Risk-based inspections,
- Marketplace surveys,
- Auditing the performance of field staff,
- Device inspections using a sampling model, and
- Emerging issues.

Will Wotthlie, MD, volunteered to lead a session on auditing field staff.

Robert Williams, TN, volunteered to present their state's RMFD testing program.

Jerry Buendel, WA, volunteered to lead a session on marketplace surveys.

All members are encouraged to submit their ideas for topics to the Committee members and to volunteer to lead, present or moderate a topic.

402 PROGRAM MANAGEMENT

402-1 W Voluntary Quality Assurance Assessment

Source: The Committee

The Committee will continue to promote the development of quality programs through the Voluntary Quality Assurance Assessments (VQAA). The Committee would like to see more participation in the VQAA. The Committee discussed the use of the ISO/IEC/EN 17025 "*General Requirements for the Competence of Calibration and Testing Laboratories*" for state and local field enforcement programs but concluded that the ISO 17025 standard does not apply to state and local field enforcement programs. The Committee recommends that the NCWM develop its own certification standards for state and local field enforcement programs. The Committee encourages all member states to utilize the VQAA and provide information to the Committee. The assessments can be a valuable tool in determining training needs. The Committee noted that in 2003 several certificates were presented at the Annual Meeting, but no requests for review were received in 2004. The Committee would like to remind the membership that the VQAA forms and other information are available on the NCWM website and the results are confidential. The CWMA believes jurisdictions interested in having the assessments made have already done so and reported that there is no interest among its membership in developing additional VQAAs checklists.

Discussion: The Committee has withdrawn this item because of inactivity or lack of interest for the past three years. The forms can still be obtained on the NCWM website or by contacting one of the Committee members.

402-2 W NCWM Associate Membership Scholarships

Source: The Committee

In past years when funding was available from the Associate Membership Committee (AMC), the Committee oversaw a system to evaluate applications and award scholarships. The Committee then provided a report on the scholarships awarded each year. No funds were made available for scholarships for the calendar year 2004. Guidelines for the Associate Membership Committee scholarships can be found in NIST Special Publication 992, Report of the 87th NCWM (2003). Continued interest in scholarships has been expressed by several state and local jurisdictions. The WWMA expressed appreciation to the AMC for its continued support of various NCWM needs and encourages the associate membership to fund training scholarships in the future if possible.

Discussion: The Committee withdrew this item. The Associate Membership Committee will decide how its money is to be used and define the criteria for applying for the funds and the NCWM's management company will provide administrative support.

402-3 I Safety Awareness

Source: The Committee

In the past the Committee's responsibility extended to the identification of safety issues in the weights and measures field and included efforts to increase safety awareness.

Recommendation: This is an area where activities should be increased to promote safety awareness.

Discussion: Past-Chairman Dennis Ehrhart explained that the Voluntary Quality Assurance Assessment program, the NCWM Associate Membership Scholarships, and Safety Awareness efforts were carryover items from the Committee on Administration and Public Affairs and recommended that the Committee make training its highest priority.

The Committee encourages jurisdictions to send the safety reports and issues to their regional safety liaison, who in turn forwards them to Charles Gardner, the NCWM Safety Coordinator, who recommends the reports or summaries of the reports be published in the NCWM newsletter. At the 2005 Interim Meeting a CD-ROM on safety produced for the U.S. Environmental Protection Agency was made available for review. The Committee agreed to ensure that safety awareness is a part of every aspect of training for NCWM stakeholders.

402-4 I Standard Categories of Weighing and Measuring Devices

Source: Western Weights and Measures Association

Discussion: The Western Weights and Measures Association (WWMA) Administration and Public Affairs (A&P) Committee recommended that standard categories of weighing and measuring devices be adopted to facilitate development of technical standards, inspector training, data collection, and program management.

Background: The final report of the *Survey of Inspection Statistics Collected by State Weights and Measures Programs [2002]*, conducted during mid-2003, observed the absence of standard categories for weighing and measuring devices was a serious obstacle to data collection. For example, the way weights and measures programs categorize scales by type, use, or capacity and capacity ranges often vary considerably. Retail motor-fuel dispensers are currently being counted either by dispenser, grade, or number of hoses or meters. The need for reliable weights and measures statistics is summarized in the final report conclusion as follows:

Accurate statistics would be helpful in many ways at both the state and national level. For instance, it is difficult to develop performance measures without statistics. Also, work plans require accurate and detailed statistics. In addition, budget, staffing, and other elements of each state program demand statistics on inspection workloads. Finally, neither individual states nor the NCWM will be able to estimate and advertise the value of the nation's weights and measures programs unless reliable statistics are available.

To correct this problem, the WWMA has developed *Standard Categories for Weighing and Measuring Devices* and recommends that standard categories for weighing and measuring devices be adopted to facilitate the development of technical standards, inspector training, inspection data collection, and weights and measures program management.

At the 2005 Interim Meeting the Committee agreed this item should remain informational at this time because standardized categories of weighing and measuring devices have merit and should be considered in the future.

At the Annual Meeting NEWMA recommended use of the categories from Handbook 44 instead of recreating new ones. The WWMA Administrative and Public Affairs Committee drafted the following recommendation for consideration by the Committee. The standard categories of weighing and measuring devices are based on capacity ranges rather than type or use. It is assumed that the inspection test procedures for scales and meters within these capacity ranges are generally similar. Weights and measures programs can adopt the recommended standard categories without changing the manner in which they presently keep records of device inspections by simply adding an extra data field.

NCWM DEVICE CATEGORY CODES

| DEVICE CODE | CATEGORY | CAPACITY | EXAMPLES |
|-------------|--|----------------------|--|
| SP | Scale, Precision | < 5 g scale division | jewelry, prescription scales |
| SS | Scale, <u>S</u> mall | < 100 lbs. | retail computing scales |
| SM | Scale, <u>M</u> edium | 100 – 5000 lb | dormant, platform scales |
| SL | Scale, <u>L</u> arge | > 5000 lb | livestock, recycler scales |
| SV | Scale, <u>V</u> ehicle | >40 000 lb | vehicle, railway track scales |
| MS | <u>M</u> eter, <u>S</u> mall | <30 gpm ¹ | retail motor fuel dispensers |
| MM | <u>M</u> eter, <u>M</u> edium | 30-100 gpm | loading rack, vehicle-tank meters |
| ML | <u>M</u> eter, <u>L</u> arge | >100 gpm | agri-chemical meters |
| MF | <u>M</u> eter, <u>M</u> ass Flow | All | heated tanks of corn syrup (soft drinks) |
| MW | <u>M</u> eter, <u>W</u> ater | All | water sub-meters for mobile homes & apartments |
| MG | <u>M</u> eter, <u>LPG</u> | All | propane sales |
| MT | <u>M</u> eter, <u>T</u> axi | All | Taximeters |
| DT | <u>D</u> evice, <u>T</u> iming | All | clocks in parking garages |
| DL | <u>D</u> evice, <u>L</u> ength Measuring | All | cordage meters |

Two-letter device category codes could be employed to categorize devices in weights and measures jurisdictions for reporting to the NCWM during annual surveys. Otherwise, the data collection procedures already in place would be unaffected. It would be helpful also to add the two-letter device category code to inspection reports.

Other measuring devices (e.g., MFM, LPG, LMD, etc.) may not require capacity-based categories like scales or liquid measuring devices.

This briefing paper was provided by the WWMA to serve as a basis for further discussion and development of this item.

¹ Retail motor-fuel dispenser counts should be based on meters except that mid-grades should be added for blenders.

Additional Considerations:

The Committee recognized that many aspects of their work would need to be documented and presented. The Committee and Board should consider the publication of a handbook or similar document.

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Jerry Buendel, Washington
Agatha Shields, Franklin County, Ohio
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Professional Development Committee

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Appendix A

Strategic Direction for the Professional Development Committee

The Committee developed their strategic direction to define its roles and responsibilities to the NCWM and the weights and measures community. The Committee members wrote principles to guide them in their deliberations and defined four main areas to focus their efforts. The Committee recognizes that its direction and responsibilities may be changed by the Board of Directors.

The guiding principles of the group were:

- Keep things simple,
- Develop programs that are realistic and achievable,
- Minimize redundancy and administrative tasks,
- Recognize that no one size fits all, and
- Meet the needs of W&M officials, service companies, industry and manufacturers.

The four main areas for focusing their efforts were:

National Training Program – the focus of the national training program would be to increase technical knowledge, strengthen credibility and improve the professionalism of the individual weights and measures official. A strong national training program will work to promote uniformity across the nation.

National Certification System – a national certification system would be developed to recognize or accredit weights and measures programs as competent or capable. The program would include requirements around individual training, proper test standards, use of national handbooks and a data gathering system.

Conference Training Topics – the Committee would be the focal point for gathering and recommending workshops or symposia on leadership, management and emerging issues to be presented during the annual conference. These topics would provide a forum for the exchange of ideas and discussion of changes in the marketplace.

Uniformity of Data – the Committee would work to develop standard categories for devices and inspection areas so that such things as the number of devices, compliance rates, frequency of inspection and other areas could be compiled and compared at the national level. These statistics could be used to benchmark organizations and to communicate the value of weights and measures to the public and to decision makers (see Item 402-4).

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