

# **North American Registry of Midwives**

## **2015 Annual Report**

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This annual report can also be found on the web at [www.narm.org](http://www.narm.org).

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**North American Registry of Midwives**

**N A R M**

# Board Members 2015

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## NARM Board of Directors

**Ida Darragh LM, CPM**  
*Chairperson*  
*Testing*

**Shannon Anton LM, CPM**  
*Vice-Chairperson*  
*Accountability*

**Carol Nelson LM, CPM**  
*Treasurer*  
*Applications*

**Debbie Pulley LM, CPM**  
*Secretary*  
*Public Education & Advocacy*

**Miriam Atma Khalsa LM, CPM**  
*Policies and Procedures*

**Kim Pekin LM, CPM**

**Elan McAllister**  
*Public Member*



# Reports 2015

## Executive Summary

*Ida Darragh CPM, Chairperson*

The North American Registry of Midwives (NARM) is the leading certification agency for direct-entry midwifery in the United States. The NARM Certification credential and/or the NARM Written Examination are required for licensure in most of the states that license direct-entry midwives and in all the states that license midwives specifically for out-of-hospital birth. NARM's midwifery certification is a state-of-the-art, legally defensible certification program. NARM's CPM certification program is accredited by the National Commission for Certifying Agencies (NCCA), the accrediting division of the Institute for Credentialing Excellence (ICE). ICE/NCCA accreditation means that our certification process was reviewed in detail and meets or exceeds the standards set by ICE for certifying agencies. The NARM Board is responsible for overseeing the operations of the certification program, including processing applications and recertifications, test development and administration, finances, accountability,

public education and advocacy, publishing a newsletter, and maintaining up-to-date policies and procedures for all departments.

NARM contracts with Dr Gerald Rosen for psychometric oversight and guidance, and with ProvExam for computer administration of the NARM Written Examination. NARM maintains a web site ([www.narm.org](http://www.narm.org)) for distributing information to candidates, certificants, and the general public. In 2015, the NARM Test Department, under the direction of Ida Darragh, oversaw the administration of the NARM Written Examination to 238 certification or licensure candidates.

By the end of 2015, the exam had been administered by computer for over 18 months and changed from three testing dates per year at 20 testing sites, to a continuous cycle of testing dates at over 100 computer testing centers. Computer based testing has been well received by the candidates, especially due to the increase in test sites and the convenience of year-round testing.

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NARM participates in several major conferences each year representing the CPM credential via attendance, sponsoring an educational booth, or teaching workshops. In 2015, NARM representatives participated in public education about midwifery in exhibit booths at these conferences: The Midwives Alliance of North America (MANA), the American Public Health Association (APHA), the American College of Nurse-Midwives (ACNM), and the National Conference of State Legislators (NCSL). NARM representatives attended or presented at additional conferences, such as the US MERA workgroup, the American Association of Birth Centers (AABC), the Institute for Credentialing Excellence (ICE), and the Council for Licensure, Enforcement, and Regulation (CLEAR).

As chair, Ida Darragh also spoke at these conferences: American College of Nurse-Midwives, May, 2015, on the CPM credential; Council on Regulation, Licensure, and Regulation, September, 2015, Ask the Experts panel; Midwives Alliance of North America, October, 2015,

NARM's Midwifery Bridge Certificate; Institute for Credentialing Excellence, November, 2015, Getting your Message Through to Legislative Audiences.

The NARM Applications Department is under the direction of Carol Nelson with assistance in evaluating and processing applications by Sally Nelson and Kate Foreman and several part-time assistants. The NARM Applications Department reports that the number of printed applications mailed continues to drop as more applicants choose to download application materials from the web. The total number of new CPM certifications issued in 2015 was 183, and 501 recertifications were issued. Of the 199 CPMs who were due for recertification but did not recertify, 134 claimed Inactive Status, 8 claimed retired status, and 57 credentials expired. The total number of midwives who have received the CPM certification by the end of 2015 is 2851.

Treasurer Carol Nelson reports that NARM is financially solvent. NARM's income is received from NARM application and recertification fees,

# Reports 2015

and from test sales to candidates taking the exam for licensure. The total income during 2015 was \$366,703. Operating expenses ran \$369,565. The cost overruns, unusual in any given year, were due to the increased costs of attending conferences and national meetings. NARM retains savings to cover cost overruns, such as needed in 2015, and for future projects such as updating the website, purchasing office equipment, or planning for the Job Analysis.

Shannon Anton directs NARM's Accountability Department which handles complaints against CPMs and follows a formal Grievance Mechanism. Complaints are handled first in local peer review and then by the NARM Grievance Mechanism, if needed. This process has worked exceptionally well in the resolution of grievances and in assuring the accountability of CPMs.

NARM Accountability received two complaints in 2015. One was addressed and resolved through Complaint Review with recommendations to the CPM. The second new complaint was received

in the 4<sup>th</sup> quarter of 2015 with Complaint Review pending in 2016. Three complaints carried over procedurally from 2014 and had Complaint Review sessions pending for 2015. Each resulted in recommendations to the CPM. Since 1995, NARM has addressed 36 complaints through the accountability process. Six CPM credentials have been revoked.

Debbie Pulley, in Public Education and Advocacy, also acts as secretary to the board. She handles hundreds of phone calls and e-mails every month from CPMs, candidates, and the general public. She keeps the board minutes of the weekly board conference calls and any other board meetings. Debbie manages the web site and all of NARM's documents including the Application Packet and the Candidate Information Bulletin.

Elan Vital McAllister is the public member of the NARM Board. Elan is the director of Choices in Childbirth in New York City, and serves as a public advocate for birth options and as a doula.

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Miriam Khalsa is responsible for keeping records of all policy decisions made by the board during our weekly phone calls and twice-yearly board meetings. She organizes all current policies that define how NARM operates.

At the end of 2014, Tomasina Oliver, CPM, retired from her position on the board, and Kim Pekin, CPM, began her first board term in January, 2015.

A major accomplishment for NARM in 2015 was the continuation of work with the U.S. MERA (United States Midwifery Education, Regulation, and Association) organizations, seven midwifery organizations representing professional associations, educational accreditation, and midwife credentialing in the U.S. Begun as a result of conversations at the annual meeting of the Midwives Alliance of North American in Toronto in 2011, following the International Confederation of Midwives recommendations in June of 2011, representatives have met yearly to discuss improving midwifery options for all mothers, most specifically through the

licensure of CPMs. Organizations participating are: Accreditation Commission for Midwifery Education (ACME), American College of Nurse-Midwives (ACNM), American Midwifery Certification Board (AMCB), Midwifery Education Accreditation Council (MEAC), Midwives Alliance of North America (MANA), National Association of Certified Professional Midwives (NACPM), and North American Registry of Midwives (NARM). NARM looks forward to continuing to work with the organizations in the future.

As part of the work with US MERA, NARM created the Midwifery Bridge Certificate, a certificate awarded to CPMs who complete 50 hours of continuing education in specific subject categories. The Midwifery Bridge Certificate is mentioned in the US MERA statement on legislation as a path to licensure for CPMs who received their education through a non-accredited program. While not required for all CPMs, the Midwifery Bridge Certificate may be required in the future in states that include the requirement

# Reports 2015

in their statutes or regulations. The Midwifery Bridge Certificate is available to all CPMs who complete the required continuing education. The Midwifery Bridge Certificate was announced in October of 2015. Four applications were received by the end of 2015, with an expectation of more to arrive in 2016.



## NARM Income and Expenses

*Carol Nelson LM, CPM, Treasurer*

The year 2015 was a good year for NARM from a fiscal standpoint. We ended the year with all expenses paid. The certification process has taken a lot of financial resources and continues to take more as we grow in numbers.

NARM occasionally receives grants for specific projects, such as the 1995 and 2001 Job Analysis surveys. Most years, our income is based on receipts from certification applications, recertification applications, and testing fees..

Our total income for 2015 was \$366,703. NARM's main sources of income are from Test Sales and Applications. Applications income includes fees for processing applications, certifications, and recertification. Our income from the Applications Department in 2015 was \$312,109. Test Sales are from the states that use the NARM exam in their Licensures/Certification process. Income from the test sales in

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2015 was \$ 54,594. The amount received from test sales decreases each year as more and more states now require their licensure candidates to complete the CPM process, so those candidate's fees are now reflected in the applications income rather than test sales. Expenditures for 2015 were \$369,565 and include categories such as Applications staff, office expenses, contracts with our psychometrician and testing company, and legal consultant, membership and fees for regulatory and credentialing organizations, and the many conferences that NARM attends to promote the CPM credential.

As the Treasurer for NARM, I believe meeting current expenses and planning for anticipated future expenses is the only fiscally responsible way to run our organization. We need to not only cover current costs, but we must think ahead to future projects, both mandated and innovative, and must therefore ensure that reserve funds are available for those projects. The Job Analysis is one such project, as is maintaining NARM's applications office with necessary equipment and

staff. To remain state of the art in testing, we must continually invest in test development and accreditation. Other projects include continued work on Item Writing and Cut Score Workshops, and education, advocacy and participation in national and international midwifery initiatives.

Our expenses are set to allow for an annual increase in net assets, so that NARM establishes a reserve fund for mandated large projects such as the job analysis and item writing and cut-score workshops. A few of our main expenses are: Consultants that run our Applications Office and the Testing Company we work with, Printing, Postage, Telephone, Conference Fees (going to conferences to promote CPMs and the Midwives Model of Care, education and advocacy initiatives), Dues/Membership in organizations such as the Institute for Credentialing Excellence (ICE), and Council on Licensure, Enforcement and Regulation (CLEAR), Insurance, Legal Fees (to be sure we stay Legally Defensible), Office Expenses and Supplies. Total expenses in 2015 came to \$367,576.60.

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North American Registry of Midwives uses Quickbooks for accounting.

We are looking forward to NARM's continued growth in 2016.

With the growth of our certification process and more Certified Professional Midwives each year, we feel honored to be doing our part to move midwifery forward and to promote the Midwives Model of Care as a viable option for women and families through out North America.



## NARM Accountability Committee

*Shannon Anton LM, CPM,  
Director of Accountability*

NARM Accountability Committee follows Complaint Review and Grievance Mechanism policies to address complaints against CPMs and CPM applicants. Legal advice is sought when appropriate. NARM Board receives regular updates regarding the activities of Accountability Committee.

NARM accountability processes work to address concerns regarding competent midwifery practice. The NARM Board reserves the right to evaluate, in its sole discretion, the appropriate application of NARM's Complaint Review and Grievance Mechanism. Complaints received by the NARM Board that do not involve issues relating to competent midwifery practice will not be addressed through NARM Complaint Review or Grievance Mechanism.

NARM will not begin the processes of Complaint Review or Grievance Mechanism with a

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CPM who is also facing regulatory investigation, or civil or criminal litigation. NARM will apply these processes only after such proceedings are concluded. It is the responsibility of the complainant to notify NARM within 90 days of the conclusion of proceeding.

Participation in peer review or peer review education is mandatory for CPM recertification. The CPM credential is renewed every three years. A CPM with inactive or expired status is bound by all policies regarding NARM Community Peer Review, Complaint Review, and Grievance Mechanism. Failure to respond to a complaint will result in revocation of the credential.

Participation in NARM Complaint Review or Grievance Mechanism is mandatory for a CPM applicant named in a complaint.

Since the beginning of the CPM credential in 1995 through 2015, this committee has addressed complaints through NARM Complaint Review 26 times and through NARM Grievance Mechanism ten times. One complaint against a

CPM Applicant was confidentially addressed through a committee of Board members utilizing the Complaint Review process. Four CPM credentials have been revoked due to noncompliance with Grievance Mechanism outcomes. Two CPM credentials were revoked due to lack of participation in response to complaints.

After confirming falsification of CPM information, another CPM credential was revoked. Revocations occurred in 2000, 2003, 2004, 2009, 2010, and 2012.

NARM Accountability received two complaints in 2015. One complaint was resolved through Complaint Review. One complaint had Complaint Review pending for the following year.



# Reports 2015

## Test Department

*Ida Darragh LM, CPM,  
Director of Testing*

Major Tasks of the Test Department in 2015 included:

1. Maintaining yearly renewal of NARM's accreditation by the National Commission of Credentialing Agencies (NCCA), the accrediting arm of the Institute for Credentialing Excellence (ICE).
2. Presenting workshops or conference sessions at several national conferences related to midwifery or to credentialing and regulation.
3. Working with the CPMs in states considering licensure. NARM board members regularly participate in e-mail and telephone discussion with midwives in states seeking licensure and sometimes visit midwives, regulatory agencies, and legislators in those states. We wrote letters regarding midwifery legislation and/or spoke on the scope of practice of CPMs for legislative

committees in several states, including Maryland and Delaware.

5. Maintaining regular communication with our psychometric services consultant, Dr Gerald Rosen, and with our computer testing company, ProvExam, under the direction of Henry Sorensen.
6. Attending the annual ICE and CLEAR conferences, participating on several committees in each organization.

## NARM Testing

The NARM Written Examination was given to 238 candidates from in 35 states, one US territory, 2 Canadian provinces, and three foreign countries. Twenty Eight states recognize the CPM for legal practice or use the NARM exam as part of the state licensure process: Alaska, Arkansas, Arizona, California, Colorado, Delaware, Florida, Idaho, Indiana, Louisiana, Maine, Minnesota, Missouri, Montana, New Hampshire, New Jersey, New Mexico, Oregon, Rhode Island, South Carolina, Tennessee, Texas, Utah,

# Reports 2015

Virginia, Vermont, Washington, Wisconsin, and Wyoming.

The NARM exam is administered by computer at over 100 College or University testing centers. The computer exam is coordinated by ProvExam based in Florida.

In 2015, the pass rate for the Written Examination was 76%. The pass rate for those taking the exam for the first time was 82%

## Test Development

Test questions are written by teams during the Item Writing workshops, and many writers continue to submit questions throughout the year. All questions are reviewed again by two teams of item writers. Final reviews are done by the NARM Board. Two forms of the exam are in use at any given time. In 2015, these forms were N and O. Item Writing work was done through June of 2015, but with the plans for a new job analysis in 2016, new item writing work will be continued after the completion of that job analysis.

## NARM Participation in NOCA and CLEAR

The NARM Test Department and Board of Directors participates in the national conferences of both the Institute for Credentialing Excellence and the Council for Licensure, Enforcement, and Regulation. In 2015, Director of Testing Ida Darragh attended the ICE conference in Portland in November and the CLEAR business meeting in Charleston in January, and CLEAR general convention in Boston in September. In addition, Ida served on the ICE Benchmarking committee, and on CLEAR's Exam Resources and Advisory Committee and Credentialing and Examination Issues committee. Ida also continues to serve on the CLEAR Board of Directors.



# Reports 2015

## Applications

*Carol Nelson LM, CPM-TN,  
Director of Applications*

In 2015, NARM issued a total of 183 new CPM credentials.

### Total 2015 New CPMs by Entry Route

- Graduates of MEAC accredited schools - 90
- Portfolio Evaluation Process (PEP) - 71
- State Licensed - 22

A total of 2851 CPM certifications have been issued since 1994

- 1982 (69.5%) have Active certification
- 28 (1%) are deceased
- 685 (24%) have Expired certification
- 136 (4.75%) have Inactive certification
- 14 (.5%) have Retired certification status
- 6 (.25%) have Revoked certification

In the year 2015, the Applications Department:

- Issued 183 new certifications
- Completed 501 recertification applications
- Processed 134 Inactive application requests
- Expired 57 CPM credentials
- Processed 8 retirement applications



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## Public Education & Advocacy

*Debbie Pulley LM, CPM  
Director of Public Education & Advocacy*

The Public Education and Advocacy director handles phone calls generated through the toll-free NARM Information phone number. Calls include requests for information on how to become a CPM, application questions, and recertification questions. There are also calls seeking general information about the NARM process or requests for midwife referrals. This office also handles press interviews.

The NARM Candidate Information Bulletin is updated regularly on the web and in print.



## Policies & Procedures

*Miriam Atma Khalsa, CPM  
Director of Policies and Procedures*

The NARM board regularly reviews existing policies for the purpose of clarifying the information in a previous policy or for establishing new policy.

**New and amended policies in 2015 include:**

- Designating some skills on the Skills Verification Form as approved for simulation rather than clinical performance
- Listing the year of revocation on the list of revoked certifications on the web page
- Adding removal of the placenta to the definition of Continuity of Care
- Clarifying that certification candidates who are applying after graduation from a MEAC-accredited program must meet all requirements for certification current at the time of application.

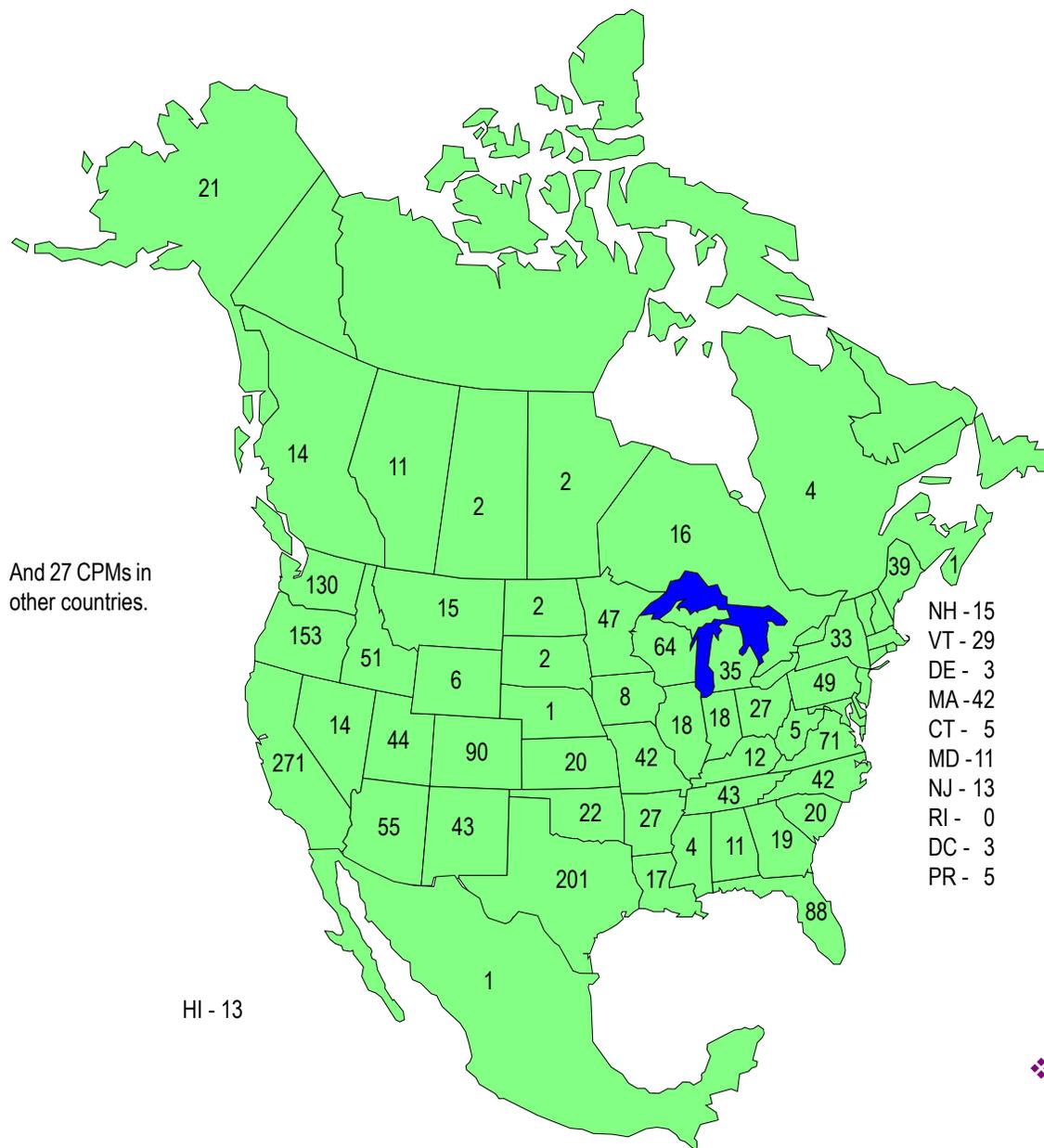
# Reports 2015

- Clarifying cancellation, no-show, and reschedule policies for the written exam, including process and fees.
- Setting December 31, 1919 as the final date for acceptance of the Experienced Midwife route to certification.
- Extending the deadline for the Expired to Retired application from December, 2015 to June, 2016.



# Reports 2015

Following is a map listing the location of CPMs in North America as of December 31, 2015.



# Board Biographies 2015

## Biographies of NARM Board Members

### Shannon Anton LM, CPM

Shannon is an apprentice trained midwife and founding member of the Bay Area Homebirth Collective in San Francisco. She co-founded National Midwifery Institute in 1995 and continues as co-director, program administrator, and instructor. Shannon served on the board of the California Association of Midwives (CAM) and piloted the initial licensing mechanism for experienced midwives in California; she holds CA midwifery license number 5. Shannon attended the NARM Certification Task Force meetings as representative of the CAM certification process. She joined the NARM Board in 1993 and serves as Director of Accountability.

Shannon has been with her life partner since 1987. They live in rural Vermont where together they built their house in 1998. Shannon was honored in 2004 with the California Association of Midwives' Brazen Woman Award.

### Ida Darragh LM, CPM

Ida attended home births in Little Rock, Arkansas for 30 years in a midwifery partnership called Birth Works with Mary Alexander. Ida has worked on the political side of midwifery from the onset, beginning with lobbying for the midwifery licensing law in Arkansas in 1983 and continuing in various positions with the Arkansas Association of Midwives and the Midwives Advisory Board of the Arkansas Department of Health.

Ida began her involvement in birth in 1975 as a childbirth educator and taught classes for both home and hospital births for 25 years. She became a midwife in 1981 and became the first licensed midwife in Arkansas in 1985. She joined the NARM Board in 1998 as the Chair of Public Education and Advocacy and became Director of Testing in 1999. In 2003, she assumed the responsibilities as Chair of the Board. As a representative of NARM, she serves on the Exam Resources Committee of the Council on Licensure, Enforcement, and Regulation and is

# Board Biographies 2015

currently on their board and has served on many committees with the Institute for Credentialing Excellence, including two terms on the National Commission for Certifying Agencies.

Ida graduated from the University of Arkansas at Little Rock in 1971. She has been married to Kramer Darragh since 1971, and they are the parents of three children and five grandchildren.

## **Elan McAllister**

Elan was elected to the NARM board in October, 2009 as the incoming public member. She is a consumer advocate, speaker, and birth policy expert in New York City. In 2004 she founded Choices in Childbirth, a New York City-based non-profit, and currently serves as Senior Advisor to the organization. She also co-founded the Grassroots Advocates Committee of CIMs and co-created that committee's jewel project, The Birth Survey. Elan sits on the Board of Maternity Neighborhood, an innovative maternity care health technology company. In addition, she is

a doula, a professionally trained dancer, and an award winning Broadway Producer.

## **Miriam Khalsa LM, CPM**

Miriam attended homebirths in Massachusetts from 1981 to 2013. She was a founding member of the Massachusetts Midwives Alliance (MMA) and served on its board in various positions for eighteen years. She co chaired the MMA Legislative Committee and worked to pass legislation for licensure of CPMs in Massachusetts. Miriam represented MMA on the Partners in Perinatal Health board for fourteen years and was the coordinator of the MANA 2002 conference held in Boston. Miriam served as an instructor for the MMA Basic Course in Midwifery Skills and is a NARM Qualified Evaluator. She has been on the Board of the North American Registry of Midwives since January 2007 serving as the Director of Policy and Procedures and managing the Skills Assessments Exam. Miriam recently moved back to her home state of northern California and became a Licensed Midwife through

# Board Biographies 2015

the California Challenge. Both of her children were born at home with the help of midwives.

## **Carol Nelson LM, CPM**

Carol lives in Summertown, TN, with Don, her husband of 42 years. She is the mother of four children, three of which were born at home, and grandmother of 8 and great grandmother of 1, all of which were born at home. She has been attending home births since 1972. She is in a midwifery partnership with five other midwives at the Farm Midwifery Center, Summertown, Tennessee. She has been actively involved with midwifery politics since 1977. Carol graduated from Oak Forest Hospital School of Nursing in 1968, was licensed by the State of Florida in 1982 as a midwife. She was on the Board of Directors of the South Florida School of midwifery from 1983 to 1988. She received her CPM in 1995, was actively involved in the Certification Task Force meetings, and was the chair of the NARM pre-approval committee. She has worked on item writing and test development of the NARM Written Exam, Skills

Assessment, and Qualified Evaluator training, and has been involved in the 1995, 2001, and 2008 Job Analysis. She has been on the NARM Board serving as the Treasurer since 1997 and Director of Applications since 2003.

Carol is co-author of the American Public Health Association (APHA) position paper, “Increasing Access to Out-Of-Hospital Maternity Care Services Through State-Regulated and Nationally-Certified Direct-entry Midwives” which was adopted in 2001 by APHA.

She is co-author of the APHA position paper, “Safe Motherhood in the United States: Reducing Maternal Mortality and Morbidity.” This was adopted in 2003 by APHA. Carol is currently active in the Maternal Child Health Section representing the profession of Midwifery and Midwifery Educators. She was the program chair for the Maternal Child Health Section of APHA for their Annual meetings for six years. In 2009 she was selected as one of the “Program Planners at large” for the APHA Annual Meeting. She is co-chair of the Innovations in

# Board Biographies 2015

Maternity Health Services Committee of the Maternal Child Health Section of APHA. This is the committee within APHA that holds the space for “normal birth.” She was on the Tennessee Council of Certified Professional Midwives, from 2000 to 2015 She works as a pro-bono lobbyist for the Tennessee Midwives Association in their legislative efforts. Since 1997 she has been the MANA Public Education and Advocacy chair helping to promote the profession of midwifery and move midwifery forward in the United States. She is on US MERA Steering Committee.

## **Kim Pekin LM, CPM**

Kim Pekin is a Certified Professional Midwife (CPM), the Clinical Director of Premier Birth Center, and the Founder of Premier Birth Center and Birth Outside the Box. She has been providing midwifery care, home birth, and birth center services as a licensed midwife since 2009 and has trained many women who have gone on to become midwives themselves.

Kim graduated from Pacific Lutheran University with a Bachelor of Business Administration in 1995. During her service as a La Leche League Leader, she was appointed the Coordinator of Leader Accreditation for Virginia and West Virginia in 2002. Kim is a graduate of National Midwifery Institute, a MEAC-Accredited school of midwifery. She became a CPM and Virginia Licensed Midwife in 2009.

In addition to her work in her midwifery practice, Kim serves as the Director of Special Projects on the Board of Directors for the North American Registry of Midwives (NARM), was appointed by the governor to serve as vice-chair of the Virginia Board of Medicine’s Advisory Board on Midwifery, and is the Vice-President of the Virginia Midwives Alliance. Kim and her husband have 7 children and live in Loudoun County, Virginia.

# Board Biographies 2015

## **Debbie Pulley LM, CPM**

Debbie has had a home birth practice in Atlanta, Georgia since 1982. Shortly after receiving her CPM certification in 1995, she started working with NARM in the Applications Department. She now serves on the NARM Board as Secretary and is Director of Public Education & Advocacy.

Debbie has been very active in state midwifery politics. Although direct-entry midwifery is not currently recognized by the state, she still is very involved in coalition building. She acts as liaison for the State's Vital Records division for out-of-

institution birth registrations. In 2000, Debbie was one of four MANA members selected to serve on the MANA/ACNM Liaison Committee and now serves as NARM's alternate member on the US MERA Steering Committee.

Debbie began attending births in 1970 while living in Hong Kong. She moved to Atlanta in 1971 and married Don in 1973. They have two children and three wonderful grandchildren. Debbie is on the US MERA Steering Committee.



# Job Descriptions 2015

## Chairperson

*Ida Darragh LM, CPM*

The Chairperson:

- Facilitates weekly Board meeting call
- Facilitates twice-yearly Board meetings
- Maintains contracts with state licensing agencies



## Treasurer

*Carol Nelson LM, CPM*

NARM by-laws state that, “The Treasurer shall have charge of all funds of the Corporation. The Treasurer shall see that a true and accurate accounting of all financial transactions of the Corporation is made and that reports of such transactions are presented to the Board of Directors at each of the regular meetings or at special meetings as called.”

The Treasurer:

- Is responsible for and keeps an accurate accounting of all funds
- Does all of the bookkeeping and accounting of the funds, makes deposits and pays all bills
- Creates reports and presents them at all regular board meetings, including income and expenses for the year to date, quarterly, end of year and comparisons of similar time frames
- Creates proposed budgets for the upcoming year
- Answers all correspondence, e-mails, and phone calls involving NARM’s finances, including audits.

The Treasurer makes recommendations to the Board. The Board makes final decisions about the use of discretionary funds.



# Job Descriptions 2015

## Secretary

*Debbie Pulley CPM*

The secretary is responsible for the following:

- Arranging lodging/meeting space for Board meetings
- Setting the agenda and taking and distributing minutes of all Board meetings and conference calls
- Managing the Board Listserv



## Public Education and Advocacy

*Debbie Pulley CPM*

The Public Education and Advocacy department's main responsibilities are to:

- Answer phone calls for the NARM 800 number
- Answer emails

- Send out information.
- Route calls and e-mails to the appropriate departments
- Manage the Board e-mail list
- Keep minutes for Board calls and meetings
- Oversee webpage updates
- Acts as PR liaison to the press
- Assist in formatting and arranging printing for NARM documents.
- Present NARM workshops
- Attend various conventions as an exhibitor for NARM



# Job Descriptions 2015

## Accountability

*Shannon Anton LM, CPM*

The tasks of the NARM Director of Accountability are as follows:

- Answer phone calls and emails regarding accountability issues and questions
- Send out information and refer to NARM website for Accountability documents
- Receive complaints regarding NARM CPMs
- Respond to complaints following NARM's process for Complaint Review and Grievance Mechanism
- Regularly update the NARM Board regarding the activities of Accountability Committee
- Seek legal advice when appropriate
- Write an annual report



## Test Department

*Ida Darragh LM, CPM*

A detailed description of Test Department tasks is kept on file in the Test Department.

The general duties of the Test Department include the following:

- Correspond with state licensing agencies regarding verification of certification when requested by the CPM
- Send Agency Packs for Agency Candidates taking the exam for licensure
- Monitor computer based testing through ProvExam
- Track and record all testing results; send retake information when needed
- Keep current list of QEs
- Review and update QE Handbook
- Coordinate communication between Board and NARM's testing vendor

# Job Descriptions 2015

- Participate in weekly NARM Board calls, follow up on specific tasks as defined by Board
- Keep current list of Test Department tasks, policies and procedures
- Answer or return phone calls to the Test Department
- Prepare Test Department report for NARM Board meetings, written reports for Fall and/or Spring Board meetings, and final, year-end report
- Maintain all appropriate information for NCCA accreditation, file annual report with the NCCA, submit re-accreditation application every five years



## Applications Department

*Carol Nelson LM, CPM*

The Applications Department responsibilities include:

- Oversee the Applications Staff who review and process all applications
- Correspond with individual applicants
- Create all administrative forms used in this department
- Create and maintain applicant database tables and forms (the complete database)
- Oversee incoming monies and reports sent to the Secretary
- Oversee outgoing Application packets
- Oversee continued supply of printed Application packets.
- Maintain CPM table
- Maintain CPM statistics tables
- Issue certificates and wallet cards for new and renewed CPMs

# Job Descriptions 2015

- Oversee distribution of *CPM Newsletter*
- Develop detailed Policies and Procedures for the Applications Department
- Update and revise application packet
- Prepare Year End Report for NARM Board meeting and Annual Reports



## Policy Management

*Miriam Atma Khalsa CPM*

Policy Management involves organizing, categorizing, and filing of all NARM Policies and Procedures.

Policy Management responsibilities include the following specific duties:

- Maintain current Policy and Procedure Manual
- Make sure all policies are updated and current
- Provide current copies to Board Members either by mail or at Board meetings

- Archive old policies when replaced, changed, or retired
- Keep a history of when these changes are made



## Special Projects

*Various Board Members*

Special NARM Projects include:

- Provides ongoing assessments of the status of projects
- Keeps ongoing task list from Board calls and meetings and send the list weekly to Board members
- Keeps ongoing list of ideas for the CPM E-blasts
- Oversees the website redesign process and materials review

