

# IDPro Body of Knowledge and Certification Program Charter

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Abstract: This document is the charter for the Body of Knowledge and Certification Program.

## Mission:

To develop and provide resources for the education and career advancement of identity professionals worldwide.

## Scope:

The goal of IDPro's Body of Knowledge and Certification program, designed to last through the lifetime of IDPro, is to create and maintain a sustainable learning resource for identity professionals and an accreditation program by which the identity professionals and companies engaged in identity, may certify their knowledge and experience in the identity field.

The program has two initiatives:

1. Developing and maintaining a Body of Knowledge (BoK)
2. Developing and maintaining an accreditation program – Certification

The BoK will be started first and achieve an initial level of completeness before the certification program is started.

The program shall have the following long-term requirements:

- Support a variety of constituencies, including practitioners (at various levels) as well as other professionals not entirely focused on identity – such as application developers, managers, and policy makers
- Be of high quality
- Initial development of the BoK will be in English
- Be based on, and references currently relevant work and best practices
- Be applicable for constituencies worldwide

The program is composed of five primary entities (or participant groups):

- BoK and Certification Committee
- Staff, including: writers, editors and others as needed from time to time
- Contributors: IDPro and non-IDPro
- IDPro Board of Directors
- Adopters/Users

These entities have varying levels of responsibility and commitment to the program.

# Objectives:

## Body of Knowledge

- Produce training and reference (handbook) content for Identity professionals

## Certification

- Develop an industry professional certification program that creates value for its certified practitioners and the organizations valuing this mark.

## Phase 1: Body of Knowledge

The development of the BoK is the first phase of the BoK and Certification program. In order to accomplish the objectives of the program, IDPro must have the following resources:

1. BoK committee
2. Principal Editor and supporting staff.

## BoK Committee

The BoK Committee shall be chartered as an Other Committee (as defined in Section 4.7 of the Membership Agreement) by the IDPro Board to work on the development and maintenance of the Body of Knowledge.

The committee shall be open to any Individual Member and representatives of Organizational Members of IDPro who are in Good Standing.

The committee shall have a minimum of 5 members. Working within the constraints of availability, the board will seek committee composition striking a fair balance of Organizational and Individual Members with no more than 50% of its members from vendor companies (Corporate Members).

The committee shall strive to reach decisions by consensus. In the case that it cannot, the decisions shall be made by Simple Majority Vote.

The committee may have, as part of its membership, a member of the Board of Directors.

The committee shall have the following deliverables:

- Definitions, techniques, methods, best practices of the identity industry that are applicable in general;
- Similar materials which are specific to industries and/or jurisdictions;
- Establish the subject matter coverage goals for the BoK for each release;

- Define the development process, including origination, review and approval cycles, risk management techniques, and problem resolution methods. The methods of development and publication must support and track frequent updates and publications;
- Develop and gain approval for a program budget;
- Establish the release schedule (roadmap);
- Identify the tools with which the BoK will develop and distribute content, ensuring the tools are accessible to participants (i.e. no company restrictions on use), secure, and supports multiple editors, version and issue tracking
- Provide guidance on structure, format, and content to the Principal Editor
- Participate in draft reviews, for example providing written comments on drafts
- Propose publication drafts to the Board

## Principal Editor (Other Staff)

The Principal Editor is a non-volunteer resource for the BoK Program and BoK Committee responsible for providing overall content, editorial, and managerial services.

The Principal Editor is responsible to the BoK Committee and ultimately reports to the Board of Directors.

The Principal Editor shall be responsible for:

- Managing the deliverables and supporting the requirements of the BoK Committee,
- Subject to Board approval, selecting spot writers and spot editors on a piece-work basis up to the funding limit
- Supervising the spot writers, spot editors and copy editor (as relevant)
- Managing expenses to stay within allocated budget
- Reporting on project expenses to the board Treasurer.

## Contributors: IDPro and non-IDPro

The Contributors, comprising members and non-members of IDPro, are a volunteer resource (solicited or unsolicited) for the development, contribution, and review of the content for the BoK. The Contributors may be responsible for:

- Providing content via original writing
- Acting as a subject matter expert to assist the committee and the writing team
- Providing already published content (in accordance with the IDPro IPR Policy) for the BoK.

## IDPro Board

The IDPro Board is the body responsible for reviewing and approving all deliverables of the BoK Committee. It sets the overall strategy and goals for the BoK and Certification program and is responsible for finding and allocating funding for the program, whether that funding comes from membership dues, direct-initiative donation, or other means.

## Adopters/Users

The Adopters or Users consist primarily of the population of identity and access management professionals who will adopt, consume, use the BoK and participate in the Certification program. Non-identity professionals may find certain content useful as well, but are not expected to adopt the Certification program.

## Content Format

The content of the BoK should be provided in a form that accommodates the following:

Indexing

Printable

E-resourced (i.e. ebook)

## Resources

In order for the program to be successful, it shall require significant investment in the form of time and funding from IDPro, and its members.

## Risks

There are several identified issues in relation to developing the Body of Knowledge and Certification program that would affect the timeline, content, and sustainability of the program deliverables. These include:

1. Inadequate funding sources
2. Insufficient volunteer commitment
3. Intellectual Property claims
4. Establishing the policy, if any, regarding content protection addressing costs, benefits, member and public access
5. External forces that may impact the content of the developed work
6. Difficulties arising from acquiring content from external parties e.g. payment or legal claims

## Phase 2: Certification Program

The Certification Program is the second phase of the BoK and Certification program and is anticipated to begin its development process after the initial level of completeness of the BoK. In order to accomplish the objectives of the program, IDPro must have the following resources:

1. Certification committee (may be a continuation or extension of the BoK committee or a newly formed committee)
2. Principal Editor and writing staff
3. Curriculum expert
4. Certification Advisory Board

## Certification Committee

The Certification Committee shall be chartered as an Other Committee (as defined in Section 4.7 of the Membership Agreement) by the IDPro Board to work on the development and maintenance of the Certification program. It can be a continuation or chartered extension of the BoK committee or a newly formed committee.

The committee shall be open to any Individual Member and representatives of Organizational Members of IDPro who are in Good Standing.

The committee shall have a minimum of 5 members. Working within the constraints of availability, the board will seek committee composition striking a fair balance of Organizational and Individual Members with no more than 50% of its members from vendor companies (Corporate Members).

The committee shall strive to reach decisions by consensus. In the case that it cannot, the decisions shall be made by Simple Majority Vote.

The committee may have, as part of its membership, a member of the Board of Directors.

The committee shall have the following deliverables:

- Review similar professional certifications and provide a report and proposal for IDPro certification program, including projections for adoption goals, cost of certification, base knowledge, general relevant industries, estimation of when and how to include add-on certifications, IDPro certification marks, recertification;
- Benchmark IDPro certification against similar professional certifications;
- Identify the BoK content appropriate for the base certification;
- Define the development process, including origination, review and approval cycles, risk management techniques, and problem resolution methods. The methods of development and publication must support and track frequent updates and publications;
- Develop and gain approval for the Certification program budget;
- Establish the release schedule (roadmap);
- Identify the tools with which the Certification committee will develop, test, manage, track, and confirm the certification process and certifications acquired, ensuring the tools are accessible to participants (i.e. no company restrictions on use), secure, and supports multiple editors, version and issue tracking;
- Provide guidance on structure, format, and content to the Principal Editor;
- Participate in draft reviews, for example providing written comments on drafts
- Establish testing and piloting methods
- Propose release drafts to the Board.

## Principal Editor (Other Staff)

The Principal Editor is a non-volunteer resource for the Certification Program and Certification Committee responsible for providing overall content, editorial, and managerial services.

The Principal Editor is responsible to the Certification Committee and ultimately reports to the Board of Directors.

The Principal Editor shall be responsible for:

- Managing the deliverables and supporting the requirements of the Certification Committee;
- Subject to Board approval, selecting spot writers and spot editors on a piece-work basis up to the funding limit;
- Supervising the spot writers, spot editors and copy editor (as relevant);
- Managing expenses to stay within allocated budget;
- Reporting on project expenses to the board Treasurer.

## Certification Expert

The Certification Expert may be a volunteer or non-volunteer resource for the Certification Committee responsible for providing guidance, recommendations, and content.

The Certification Expert is responsible to the Certification Committee and ultimately reports (if non-volunteer resource) to the Board of Directors.

The Certification Expert shall be responsible for:

- Supporting the requirements of the Certification Committee;
- Providing guidance on professional certification processes, related accreditation bodies, processes for dispute resolution;
- Developing and managing the certification process, including scheduling and managing any certification events, tracking and issuing certifications, and initial adjudicator on any certification concerns.

## Certification Advisory Board

The Certification Advisory Board is responsible for, in collaboration with the Certification Expert, providing expertise, recommendations, and decisions related to the execution, maintenance, and issue resolution of the Certification Program. This board is appointed by the Board, which will also establish any compensation.

## Content Format

The content of the Certification program should be provided in a form that accommodates the testing and support requirements established by the Certification Committee and the Certification Advisory Board.

## Resources

In order for the program to be successful, it shall require significant investment in the form of time and funding from IDPro, and its members.