2020 was an extraordinarily challenging year for all of us involved in the senior living and health services industry and profession. Our industry members who are on the front lines of the COVID pandemic have provided heroic services to their residents and clients over the past year. We salute them with deep gratitude for their dedication to the profession.
On The Inside
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Support

NAB is the impartial organization advancing public protection along the senior living and health services continuum through enhanced professional standards for Health Services Executives.

- NAB is the only organization that affords collaboration among State Board Executives and State Board Members for development of best practices, model standards and credentialing resources.
- NAB engages its members in shaping and influencing the Health Services Executive profession.
- NAB is the only organization that accredits Health Services Executive degree programs for colleges and universities.
- NAB is the only organization that assures that quality Continuing Education is relevant, practical and accessible to the greatest number of Health Services Executives.
- NAB has developed valid and defensible examinations for the Health Services Executive profession for more than four decades.
Message from the Chair and President

2020 was an extraordinarily challenging year for all of us involved in the senior living and health services industry and profession. Our industry members who are on the front lines of the COVID pandemic have provided heroic services to their residents and clients over the past year. We salute them with deep gratitude for their dedication to the profession.

As we reflect on a challenging year, we look forward to 2021 with great hope for restoring a sense of health and safety of our families, friends, and colleagues and a return to some sense of normalcy and the ability to, once again, enjoy the networking and collegiality that NAB provides us.

We started 2020 with a high level of excitement as we prepared to launch an update of the professional practice analysis (PPA). The results of the PPA infuse new insights and direction into all of NAB’s programs and services and set us on a path of reinventing all that we do. We were fortunate to identify a very diverse and enthusiastic job analysis committee (JAC) that met in person in February to begin the work of the PPA. We are so thankful to the members of the JAC who stayed with us virtually to complete the work throughout the year despite tremendous challenges in their professional and personal lives.

In March, life changed for all of us. As the Executive Committee met in March of 2020, the World Health Organization (WHO) declared COVID to be a global pandemic. The Executive Committee acted quickly to make decisions to ensure ongoing operations, contingency plans for how we would conduct our work and meetings over the next few months, and assessed the impact on NAB’s programs and services and took executive action to adjust policies and procedures accordingly in support of candidates and the profession.

Despite the extreme challenges faced by our members in the profession, the work of NAB’s committees continued. The level of dedication by our volunteers was phenomenal and they persevered with many hours of virtual meetings to assure that the PPA and ongoing exam development work continued. The CE Committee quickly reacted to support a transition to virtual conferences and events and the Education Committee began planning for virtual site visits for academic accreditation. After exam test sites shut down, NAB was successful in appealing for limited early opening for testing based on the need to license essential workers and ensure an adequate pipeline into the profession. Fortunately, the NAB office was well positioned with the tools and resources to quickly pivot to a virtual work environment and there was no interruption to NAB’s operations.

The NAB is grateful to the 2018-2020 elected and appointed leadership team, committee members, members and staff for their hard work and dedication over the past two years and their ability to meet most of the work of the strategic plan over the past two years. We also want to give a huge thank you to the NAB 2018-2020 leadership team for graciously extending their terms of office for an additional four months until elections could be held in October.

Although it was disappointing not to celebrate NAB’s 50th anniversary in person, the NAB leadership and staff executed a very successful virtual Annual Meeting in October with strong participation. Some of the highlights of the Annual Meeting included adoption of a strategic plan for 2020-2022, the election of NAB officers, and adoption of the PPA. NAB celebrated and recognized the outstanding contributions of NAB Past President John Hogan with NAB’s newly renamed “Randy Lindner Distinguished Leadership Award” and celebrated NAB CEO Randy Lindner’s 25 years of service to NAB. In lieu of a fundraising event, we are so proud that NAB and the NAB Foundation joined together in a fund raising effort which provided $5,000 in financial support to CNAs for Quality Care (C4QC). The donation was accepted by C4QC Executive Director Lori Porter who delivered an emotional and heartfelt message of thanks for the support to the frontline workers who provide direct care to their residents while risking the health and safety of themselves and their families every day. Funds were directed to assist CNAs in dire financial situations with support for the essential needs of their families during the pandemic.

Despite the pandemic, we have so much to be thankful for — we met the challenges, we did not just survive, we thrived, and kept our strategic focus moving forward. We are excited and look forward to 2021, celebrating NAB’s 50th Anniversary in person, and the work ahead to bring the new PPA to life in early 2022.
As the world navigated a very tumultuous year, during which the senior living and health services profession faced endless attacks and negative press, the need for leadership expertise across the continuum of care was greater than ever. While it is still unknown what the long-term care profession will look like post-COVID, NAB’s Health Services Executive (HSE™) qualification evaluates the skill sets of our most talented administrators through education, experience, and examination.

As the world came to a halt, the rate of the state rollout of the HSE™ acceptance through equivalency or licensure decreased as well. In June 2020, South Carolina joined the other 18 states and began accepting the HSE™ as meeting the licensure requirements for NHA licensure. In 2020, NAB received 40 HSE™ application submissions bringing the total number of applications to 511. The year 2019 also brought in an additional 16 HSE™-qualified administrators bringing the total count of Health Services Executives to 258.

The year ended with the release of the White House Executive Order on Increasing Economic and Geographic Mobility. The goal of this order is for federal leaders to work with their state, local, or tribal counterparts to better align state and federal regulations while eliminating those that are unnecessary for public protection or drive up costs. In 2021, the NAB Credentialing Commission will be reviewing this in collaboration with the State Governance and Regulatory Issues Committee to provide more information on how your state can be involved.

Finally, a special thank you to the NAB Credentialing Commission for their work over the past four years to advance the HSE™ qualification. Your dedication and expertise is greatly appreciated!
Exams

2020 was unprecedented in many ways as both NAB staff and volunteers alike navigated the COVID-19 pandemic, which resulted in nationwide lockdowns, cancelled events, and many virtual meetings. Despite the challenges that the COVID-19 pandemic brought, NAB initiatives continued to move forward with the discreet celebration of the organization’s 50th anniversary in October to the completion of the Professional Practice Analysis (PPA), conducted every five years, which was approved in November. The implementation of the PPA will begin in early 2021, with the first exams aligned with the updated Domains of Practice released in March 2022.

The 2020 PPA work group analyzed NAB’s current Domains of Practice, utilizing these to develop the job analysis survey, which was sent to 24,778 licensed professionals across the nation. Of those professionals who received the survey, 25% (6,211) responded to all or part of the survey. When the data was analyzed, 2,076 of the survey responses contained complete, usable data and were counted within the final report. The resulting set of Domains of Practice are available on the NAB website. Click here to view.

NAB continues to support, as it has done over the past five decades, state regulatory boards across the United States who license professionals serving along the continuum of senior living and health services administration through the development of national examinations that are both valid and defensible. Despite lengthy test center closures, NAB’s national licensing exams continued to perform well throughout 2020. 5,387 CORE General Knowledge and Line of Service (LOS) examinations were administered in 2020, which was an 8% decline from 2019. The decline was attributed to test center closures along with apprehension of being in public spaces during the pandemic. The table below outlines the 2020 data per exam module.

In addition to the national examinations, NAB administers the National State-Based Licensing Exams (NSBL) for both NHA and RCAL on behalf of select state licensing boards and agencies. In 2020, NAB administered 1,108 NSBL NHA/RCAL exams representing 10 states: Florida, Maryland, Missouri, New Hampshire, Ohio, Oklahoma, Pennsylvania, South Carolina, Texas, and Wisconsin. This was a 7% decrease from the 2019 totals due to the pandemic, as well as the discontinuation of the Michigan state exam requirement at the end of 2019.

NAB sincerely thanks each subject matter expert (SME) involved in the exam development process, from the item writers responsible for the question development to the committee members who review the final examination forms prior to publication. Without your expertise, the past 50 years would not have been possible.

<table>
<thead>
<tr>
<th>Exam Type</th>
<th>Total Exam Taken</th>
<th>Percentage of Exams Taken</th>
<th>Exam Pass Rate Percentage</th>
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<tbody>
<tr>
<td>General Core of Knowledge</td>
<td>2,313</td>
<td>43%</td>
<td>87%</td>
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<tr>
<td>NHA Line of Service</td>
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<td>64%</td>
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<td>RCAL Line of Service</td>
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<td>8%</td>
<td>66%</td>
</tr>
<tr>
<td>HCBS Line of Service</td>
<td>50</td>
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<td>72%</td>
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NAB 2020 5 ANNUAL REPORT
The National Continuing Education Review Service (NCERS) remained strong and agile throughout 2020, especially during a time of significant change brought on by the COVID-19 pandemic. Staff worked closely with Continuing Education (CE) Sponsors to ensure modifications and updates to programs were made quickly and efficiently to meet the CE needs of senior living and health services executives.

NAB is thankful for the 53 volunteer reviewers that represent over 20 states. In 2020, the NCERS approved 4,899 programs and reviewed 364 in-person and 2,348 distance learning programs! Nearly 130 in-person programs were cancelled due to COVID, but many of those transitioned into a distance learning format at no additional charge. While we did expect to see a decline in program submissions and approvals, the NAB ended the 2020 calendar year with an increase in new sponsorship with over 400 active NCERS Sponsors.

Each year, the CE Committee reviews and approves sponsors for Certified Sponsor status. This status eliminates some requirements in place for a standard sponsor and ensures quicker approval of submissions. In the fall of 2020, the committee approved two new sponsors, bringing the total of active certified sponsors to 124. Additionally, in 2020 the NCERS renewed its first group of Certified Sponsors. Six active certified sponsors were approved for five years. This initial group of six also assisted the NAB in navigating and testing the new online renewal portal. We will continue to renew small groups of Certified Sponsors each year in June and November.

The National Continuing Education Registry continues to grow. The CE Registry currently has over 32,800 active administrators including 887 individuals who do not report to a NAB Member Boards. Those using the CE Registry and not licensed by a NAB Member board currently pay an annual $20 access fee. Four states have made the CE Registry mandatory for reporting CEs for licensure renewal and 33 states have made the CE Registry voluntary for renewal. All state licensing boards have access to the CE Registry of administrators licensed within their jurisdiction. They can review an individual’s CE Registry or retrieve multiple administrators’ records based on a license cycle.

Approved in 2019, NAB officially launched the NCERS Affiliate discount program for NABs Sponsors affiliated with state organizations. Sponsors affiliated with Argentum, LeadingAge, AHCA, NCAL, ACHCA, or any other state organization will receive a discount on all program submission fees. The discount is based off the affiliate association’s gross annual revenue for the most recent year. We are excited to welcome those state associations to NAB!

The CE Committee met one time in 2020 during the Virtual NAB Annual Meeting held in October. The committee reviewed the revised strategic plan for the upcoming year. The committee will be looking forward to diversifying and recruiting new NCERS reviewer volunteers and launching the new professional practice analysis to sponsors.
Every year at the NAB Annual and Mid-Year Meetings, there is a flurry of activities and accomplishments. From new member and exam development orientation to forum and committee meetings to the Board of Governors meeting, NAB volunteers meet to discuss senior living and its related components.

With health services being acutely impacted by COVID-19 in 2020, it was more difficult, but also more important, that the NAB held its yearly meetings. In 2020, the NAB was only able to hold the Annual Meeting virtually October 26-30, 2020.

A major accomplishment in 2020 was the completion of the new Professional Practice Analysis. The results were presented to the Board of Governors, as well as a request to increase the number of pre-test exam questions and seat time in the future. The University of Minnesota achieved initial HSE™ accreditation, and three schools had their accreditation site visits postponed until 2021 due to campus restrictions. The definition of an “active status” certified sponsor was updated and two new certified sponsors were approved. Due to current events, the NAB bylaws and policy were updated to allow an Annual Meeting to take place at any time during the year to perform association business. Additionally, a slate of officers was presented for the 2020-2022 term and the election was held, followed by the installation of officers for the next 2-year term.

The general session, “Long Term Care and Post-Acute Services, Partners and COVID-19,” was of great interest to attendees. Panelists discussed how the pandemic impacted not only senior living, but also higher education, continuing education providers, and state licensing boards.

With the current officers’ terms coming to an end with the 2020 Annual Meeting, outgoing chair, Lisa Hahn, thanked the Executive Committee, committee chairs, vice-chairs, and forum conveners and recorders, as well as the rest of the NAB volunteers. She also announced the renaming of the Distinguished Service Award to the “Randy Lindner Distinguished Leadership Award,” as well as its recipient, John Hogan for his dedication and service to NAB over the years. Finally, Lisa Hahn was presented with the 2020 Outstanding Leadership Award for her years of service to NAB.
The Education Committee continued to work toward its goal to attract and accredit new HSE™ degree programs by approving the Health Services Management bachelor’s degree at the University of Minnesota (St. Paul). There are now 10 HSE™-accredited programs and 15 NAB-accredited schools overall. COVID-19 forced the volunteer reviewers to perform a virtual site visit and necessitated rescheduling those schools that were up for academic accreditation renewal in 2020. After Ohio University notified the NAB that they would be sunsetting their Health Administration program, which is HSE™-accredited, the committee agreed their accreditation would end December 31, 2021. It was also confirmed that the accreditation criteria aligned with the current NAB Domains of Practice, as outlined in the 2018-2020 Strategic Plan.

The NAB saw continued growth and engagement across its social media channels in 2020. Our Facebook channel saw a 43% increase in followers, Twitter followers increased by 24%, and our new LinkedIn company page garnered over 500 followers.

Our #FridayFeature posts highlighting recent administrators who earn the Health Services Executive (HSE™) qualification continue to drive engagement and expand our organic reach. In 2021, we will continue to highlight and expand our efforts to promote the HSE program, as well as increase awareness for various NAB resources and tools.

As a reminder, we are always open to new topics and content for our social media channels. Feel free to reach out or submit an idea here.
The NAB Foundation (NABF), a 501(c)3 organization, serves to advance quality leadership through support of: education, research, activities, and collaborations.

The NAB Foundation Board of Trustees held its first meeting of 2020 on March 13, 2020 as the COVID pandemic was breaking into a full health emergency. It was clear that business as usual would be disrupted for some time. Following the approval of the new Strategic Plan in November of 2019, the Trustees focused the meeting on assigning workgroups to various parts of the plan.

The Trustees approved a revision to the Foundation’s investment policy to better position investments in alignment with NAB’s investment policy and to adjust to the growth in assets from the previous year. The Foundation has been fortunate to continue to increase its net assets each year.

The NAB Foundation’s strategic focus and 2020 budget were focused on two primary initiatives: Vision 2025 and the National Emerging Leadership Summit. The goal of Vision 2025 is to advance a national strategy to enhance and expand robust and strong health services and senior living executives degree programs. Although Vision 2025 scheduled for July of 2020 was cancelled due to COVID, significant work continued through the seven primary work groups. Those work groups and goals are as follows:

**Infrastructure:** Development of infrastructure and Future Funding Model

**Directory of Programs:** Data base of viable and sustainable undergraduate programs that are available for students seeking a career in the leadership senior care sector.

**Internships:** Develop the recommended definition(s) of a quality internship program. Specifically, the length of program and curriculum(s)

**Demand Study:** Advance a credible and partner-oriented supply and demand study of the predicted supply and demand needs for the senior care and services sector of leadership.

**Pathways:** Create tools that describes career pathways and opportunities in senior care leadership positions for high schools, early undergraduates and second career students

**Partnerships between Providers and Universities:** Have 25 robust and strong University and College Programs focused on senior care and services leadership by 2025.

**Commitment of University Leadership:** Secure higher administrative leadership support from all identified Universities and Colleges.

The Foundation continued in its 11th year as a co-sponsor of the National Emerging Leadership Summit for Healthcare Administrators in Aging Services (NELS). Like Vision 2025, the in-person NELS event was cancelled. To maintain the visibility of NELS, a shortened virtual event was held. While NELS typically attracts 30-40 participants, the virtual format allowed more than 100 emerging leaders to participate. We are encouraged that this will lead to significant interest in the next in-person event. The purpose of NELS is for professionals in health and aging services to engage with fellow emerging leaders in an unrivaled opportunity to strategize, advocate, connect, and innovate the future of the health and aging services executive profession.

Although 2020 was a challenging year, the Foundation’s Trustees met the challenge and maintained momentum on its primary strategic goal: Advancing Quality Leadership Through Support of: Education, Research, Activities and Collaborations.
The events of 2020 had a significant impact on NAB’s program revenues with overall revenue coming in at -$277,029 (9.5%) below annual budget. The biggest decline was in the National Continuing Education Review Service (NCERS) coming in under budget by -$139,204 (15.47%) due to the cancellation of major in-person conferences and events, followed by state exam administration revenues which were under budget by -$53,513.20 (22.3%) due to reduced mobility and academic accreditation was -$22,250 (74%) under budget due to cancellation of spring site visits.

All exam programs were under budget by minor percentages and despite the one month shutdown of testing centers, revenues recovered well over the remainder of the year. Fortunately, NAB’s expenses were under budget by -$521,787.75 (18%), primarily due to cancellation of all in-person meetings following the March Executive Committee Meeting. Meetings and related travel expenses for NAB leadership, Exam Committee meetings and our Annual and Mid-Year Meetings are a significant cost to NAB.

Our continued success and stability is due to the dedication of our elected and appointed leaders, committee members, reviewers and Board delegates who carried on the work and business of NAB virtually and without interruption. In addition, our investments performed very well despite the early jolt to the financial markets in the first quarter of the year. NAB ended the 2020 fiscal year with an operating surplus of $370,079.55. A gain on investments of $208,223 and allocation to reserves of $227,500,000 leaves year end excess funds of $350,802.25, which will be allocated between the general, and exam security funds after completion of the audit. NAB’s major programs and services continue to provide a diverse source of revenue, allowing NAB to keep member dues at less than three percent (3%) of annual revenue, compared to association industry averages of forty percent. We continue to benefit from the investments made in restructuring our exam programs, which has positioned the Residential Care/Assisted Living (RCAL) exam to operate with a surplus for a second year in a row. We look forward to returning to some level of normalcy and predictability in 2021 and are fortunate to be in such a strong financial position despite the many challenges of 2020.
NAB Would Like to Thank Our Leadership Team for Their Invaluable Contributions in 2020:

Lisa Hahn (Virginia)—Chairman
Mary Ellen Wilkinson (Nevada)—Chair-Elect, Bylaws Committee Chair
Gaylord “Z” Thomas (Oklahoma)—Treasurer
Michael Hickey (Washington)—Secretary
Delvin Zook (Oregon)—Immediate Past Chairman, NAB Foundation Chair
Eric Hadley (South Carolina)—Continuing Education Committee Co-Chair
Jennifer Johns-Artisensi (Wisconsin)—Continuing Education Committee Co-Chair
Kathie Will (Ohio)—Education Committee Chair
Keith Knapp (Kentucky)—Education Committee Vice Chair
Denise Boudreau Scott (New Jersey)—Member Relations and Outreach Committee Chair
Jody DePriest (Louisiana)—Member Relations and Outreach Committee Vice Chair
Peggy Krikava (North Dakota)—State Governance and Regulatory Issues Committee Chair
Katrina Magdon (Alabama)—State Governance and Regulatory Issues Committee Vice Chair
Randy D. Snyder (Minnesota)—Credentialing Commission Co-Chair
Margaret McConnell (Nevada)—Credentialing Commission Co-Chair
Philip Jean (Massachusetts)—Examinations Committee Chair
Michael Coury (Ohio)—Examinations Committee Vice Chair
Katrina Magdon (Alabama)—NHA Examination Committee Chair
Bryan Bee (Wisconsin)—NHA Examination Committee Vice Chair
Douglas Sinclair (Nevada)—RCAL Examination Subcommittee Chair
Susan Hunter (Oregon)—RCAL Examination Subcommittee Vice Chair
Katie Davis (Minnesota)—HCBS Examination Subcommittee Chair
Ben Higgins (Virginia)—HCBS Examination Subcommittee Vice Chair
John Hogan (Oregon)—Bylaws Committee Vice Chair
Donna Alexander (Ohio)—Academic Forum Convener
Sarah Doctor Greenwade (South Carolina)—State Board Member Forum Convener
Deb Veley (Ohio)—State Executive Forum Convener
Sharon Parver (District of Columbia)—NCERS Forum Convener

NAB Staff
Randy L. Lindner—President and CEO
Michelle Grachek—Chief Operating Officer (COO)
Julie Elfand—Senior Director of Meetings
Kristi Wolford—Program Manager
Lisa Longfellow—Program Manager
Nerissa Hart—Associate
Lisa Wetherald—Content Marketing Manager

NAB
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